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Worthing Retail & Main Town Centre Uses Study

Final Report, August 2017



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For and on behalf of GVA Grimley Ltd

1 Introduction

- 1.1 In September 2016, GVA was instructed by Worthing Borough Council to undertake a borough-wide retail and commercial leisure study. The purpose of our study is to provide the Council with an up-to-date understanding of the current health and performance of the Borough's retail and leisure offer within the existing network of town centres, set out current and future needs for additional floorspace for the Borough over to the period 2033, and provide the Council with recommendations regarding the suitability of their existing policy approach in respect of retail and town centres. This evidence based study will be used by the Council to inform the emerging Worthing Local Plan which will guide development in the Borough until 2033, and will remain at the Council's disposal to assist in the determination of planning applications for new development in the Borough.
- 1.2 Our terms of reference are to:
- Establish the extent to which the current retail and leisure provision in the borough satisfies the level and nature of consumer demand within the catchment;
 - Estimate the scale and nature of change in this position that may arise in the light of potential increase in population and forecast changes in retail expenditure;
 - Identify the scale and nature of additional convenience and comparison retail provision that may be appropriate across the borough to the period 2033 and intervening five year periods;
 - Assess the scope for new retail and leisure development and the potential to accommodate this within the borough through a recommended town centre strategy; and
 - Assess the appropriateness of the existing Core Strategy policy approach for retail and main town centre uses across the Borough in order to inform new emerging policies for the new Worthing Local Plan.
- 1.3 In addition to on-site and desk based evidence gathering, this report is informed by a new household telephone survey covering 500 households across five survey zones (**Plan 1**). GVA designed the survey questionnaire in consultation with Worthing Borough Council and NEMS Market Research who undertook the interviewing and data processing in September 2016. The findings of the household telephone survey are used to identify where residents in the Borough (and wider 'survey area') are undertaking their food and non-food shopping, which informs the assessments of future retail capacity which this study identifies. It also identifies where residents are undertaking their commercial leisure visits, and what residents like and dislike about the centres in the Borough which they use for shopping and leisure.
- 1.4 Alongside this main report are a series of plans, which show the household survey area mentioned above, and the 'market shares' of key shopping locations in the Borough. Supporting data is set out in the accompanying appendices. A glossary of key terms is appended to this report.

Structure of report

- 1.5 This report is structured as follows:
- **Section 2** summarises the national, strategic and local planning policies relevant to retail and town centre uses in Worthing Borough;
 - **Section 3** considers national trends in the retail sector, and in particular the implications of economic fluctuations and technological advances which are impacting on shopping habits;
 - **Section 4** considers the wider sub-regional context and identifies key centres which compete directly with Worthing for market share. We also provide a review of each of the competing centres and set out a high level review of composition;
 - **Section 5** reviews the composition, role and function of Worthing town centre through a 'health check' assessment, drawing on on-site surveys and the outputs from the Household Telephone Survey;
 - **Section 6** outlines the composition, role and function of the three District centres in the borough (Goring, Broadwater and West Durrington) through 'health check' assessments, and again, draws on on-site surveys and the outputs from the Household Telephone Survey. We set out a high level overview of the medium and small local centres;
 - **Section 7** considers the current provision of commercial leisure uses throughout the study area and identifies any gaps or deficiencies in provision that a future town centre strategy should seek to address;

- **Section 8** sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace in Worthing until 2033 (the Plan period);
- **Section 9** sets out our recommendations in respect of identification of town centre boundaries and frontages, and also reviews the robustness of the Council's current approach in respect of its policies for retail development and town centres; and
- **Section 10** draws the analysis together and sets out our conclusions and recommendations in respect of the current health and composition of the Borough's main town centres and the need and opportunities for further growth.

2 Planning policy context

- 2.1 In this section we summarise the key features of national, and local planning policy guidance which provide the context and framework for the remainder of this study, and also identify the key opportunity areas in Worthing town centre which we refer to throughout the duration of this report.

National Planning Policy Framework (NPPF), March 2012

- 2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012, sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.
- 2.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.
- 2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a network and hierarchy of centres that are resilient to anticipated future economic changes;
 - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
 - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
 - Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available;
 - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
 - Recognise that residential development can play an important role in ensuring the vitality of centres; and
 - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia:
- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and

- The capacity of existing centres to accommodate new town centre development.
- 2.6 Local Plans will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:
- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
 - Justified i.e. the most appropriate strategy, when considered against the alternatives;
 - Effective i.e. deliverable over its plan period and based on effective joint working; and
 - Consistent with national policy i.e. enable the delivery of sustainable development
- 2.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

National Planning Policy Guidance (NPPG) (2014)

- 2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through the production of a positive vision or strategy for town centres.

Permitted Development

- 2.9 An important change since the Council's previous retail evidence base study is the introduction of Permitted Development Rights covering class A1 retail units, meaning that they can now be converted to other uses without the need for planning permission. Specifically, the Permitted Development Rights made permanent on 15th April 2016 allow for the conversion of class A1 retail shop units to the following uses:
- Class A2 (financial and professional services);
 - Up to 150 sq.m class A3 (restaurants and cafes), subject to prior approval;
 - Up to 200 sq.m class D2 (assembly and leisure), subject to prior approval and if the premises were in class A1 use at 5th December 2013;
 - Class C3 (dwellinghouses), if the cumulative floorspace of the building is under 150 sq.m and subject to prior approval.
- 2.10 Councils have the power to remove national permitted development rights under what is known as an 'Article 4 Direction'. Article 4 (1) of the Town and Country Planning (General Permitted Development) (England) Order 2015 states that a Council when making a direction must be satisfied that it is expedient that development that would normally benefit from permitted development rights should not be carried out unless a planning permission is granted. Paragraph 200 of the NPPF states that the use of Article 4 directions to remove national permitted development rights should be 'limited to situations where this is necessary to protect local amenity or the wellbeing of an area'. Paragraph 038 of the Planning Practice Guidance states that in deciding whether an Article 4 direction would be appropriate, Councils should identify clearly the potential harm that the direction is intended to address.
- 2.11 We are aware of a number of local planning authorities that have introduced Article 4 directions covering their network of town centres as a mechanism of protecting the retail function of their centres and protecting their overall vitality and viability. The removal of permitted development rights ensures that any applications for changes of use within defined Article 4 areas are assessed against the Council's development plan.
- 2.12 A summary of the changes allowed under permitted development in respect of A-class and Sui Generis uses is provided in **Figure 2.1** overleaf.

Figure 2.1: Summary of Permitted Development Rights, A-class and Sui Generis uses

From	To
A1 (shops)	A2 , or up to 150m ² A3 subject to Prior Approval, or up to 200m ² D2 subject to Prior Approval and only if the premises was in A1 use on 5th December 2013. A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
A2 (professional and financial services) when premises have a display window at ground level, but excluding betting offices or pay day loan shops	A1 , or up to 150m ² A3 subject to Prior Approval, or up to 200m ² D2 subject to Prior Approval and only if the premises was in A2 use on 5th December 2013. A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
A3 (restaurants and cafes)	A1 or A2
A4 (drinking establishments)	AA
A5 (hot food takeaways)	A1 or A2 or A3
AA (drinking establishment with expanded food provision)	A4
Sui Generis (casinos and amusement arcades/centres)	D2 , or only if existing building is under 150m ² A3 or subject to Prior Approval. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
Sui Generis (betting offices and pay day loan shops)	A1 or A2 . C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval. A mixed use comprising a betting office or a pay day loan shop, or an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions.

Source: Planning Portal

Local Policy Framework

Worthing Borough Adopted Core Strategy (April 2011)

- 2.13 Worthing Council adopted their Core Strategy document in April 2011. The document is a part of the Local Development Framework and it contains the planning vision and strategy for place-making in Worthing Borough. Furthermore it sets out a broad policy framework for all the documents comprising the Development Plan for the period up until 2026, to guide development in different parts of the Borough.
- 2.14 Strategic Objective 2 seeks to revitalise Worthing's town centre and seafront. As such these areas will be the central focus for change and regeneration over the plan period to ensure continued economic growth and creation of new jobs within the borough. Investment in and delivery of retail and other commercial development will be key to bringing about this change. The Council hope to bring forward development through utilising key identified sites for mixed use development (see Policy 2 below).
- 2.15 Further to this, a key desired outcome of the strategy is to achieve increased connectivity between the town centre and the sea front, in order to allow for a more integrated retail and tourism/leisure offer.
- 2.16 In planning for growth, Core Strategy Policy 2, Areas of Change, promotes the focus for regeneration and development proposals to be directed towards 12 'Areas of Change'. The Areas of Change include the following:
- **Aquarena Site (Area of Change 1)** – this Area of Change relates to the former Aquarena swimming pool site outside of the designated town centre boundary to the east. The site is recognised as a gateway site into the town centre and it is proposed that a mix of uses is promoted including hotel, café/ restaurant, residential and

supporting retail and leisure. Further to this there is opportunity for a landmark building. The new Splashpoint Leisure Centre which opened in May 2013 has addressed the policy requirement for delivery of a new public swimming pool.

A proposal for the demolition of the swimming pool and car park and erection of 147 residential apartments, including 39 affordable units in buildings of 14-21 storeys including parking and associated landscaping was refused planning permission by the Council in October 2015; this refusal was the subject of an appeal, although the appeal was withdrawn in May 2017¹. A revised application² for the redevelopment of the site was submitted in October 2016, and has subsequently been approved.

- **Stagecoach Site (Area of Change 2)** — this Area of Change relates to the Stagecoach Bus Depot which holds a prominent position on the seafront at Marine Parade, east of the Pier. The site sits adjacent to the Steyne Gardens and Warwick Gardens Conservation Areas and the Grade II listed Dome Cinema. The long linear nature of the site which is constrained either side by buildings makes for difficult egress and access. The site is considered suitable for mixed use development including retail, residential (upper floors) and cultural uses. It is proposed that an accessible pedestrian link from Marine Parade to Warwick Street should be implemented.
- **Grafton Site (Area of Change 3)** – this Area of Change relates to the multi –storey car park with bowling alley below ground level, which is located on the seafront on Marine Parade opposite the Lido. The rear of the site has a pedestrian link to Montague Street and the site itself sits adjacent to the Marine Parade and Hinterland Conservation Area and the South Street Conservation Area. The Grafton site is one of the key strategic sites for development and has long been identified for its potential to improve linkages between the town centre and the seafront.

A key objective for the site is to create a new landmark on the seafront as part of a mixed use development incorporating retail, leisure and residential uses. There is a desire to develop this site along with upgrading of the Lido to provide a range of seafront leisure activities to create stronger visual and physical connections with Montague Street.

- **Union Place South (Area of Change 4)** — this Area of Change relates to a number of underutilised or vacant parcels of land which together comprise the rectangular shaped site bounded by Chapel Road to the west. The wider site comprises a large surface car park, vacant land previously occupied by the former police station, and the Guildbourne Centre.

The proposals for the site include comprehensive redevelopment to create a new retail quarter providing modern retail floorspace and high density residential development. High quality public spaces and pedestrian/cycle routes to create active street frontages is an important consideration in development of this site.

- **Teville Gate (Area of Change 5)** — this Area of Change relates to the site which is located just south east of Worthing railway station. The site comprises the former Teville Gate House (vacant office building), Teville Gate multi-storey car park and a number of derelict buildings the majority of which were formerly retail units. In 2011 planning permission (for retail, cinema and leisure and residential uses) was granted (subject to a legal agreement) for a mixed use development including 260 flats and a mix of leisure/retail facilities. Funding issues prevented that development proceeding and the legal agreement was not signed.

The site is considered suitable for mixed use development incorporating leisure, residential and supporting retail uses, which complement the town centre's existing retail offer. Integration of pedestrian and cycling routes will be important on site to maximise the strategic transport link which Broadwater Road creates. The majority of the site was purchased in 2015 by an investment company, and a variety of options are currently being explored with an expected planning application 2017.

- **Newland Street Superstore Site (Area of Change 6)** — this Area of Change relates to the Morrisons foodstore and wider site area. Although the site is occupied, it is understood that the current occupier has had long term plans to enhance and redevelop the remainder of the site. In 2010 planning permission was granted for an extension of 668 sq.m net of additional retail floorspace and two shop units (112 sq.m) and extension to the south to provide for a new café (357 sq.m). Morrison's have made significant improvements to the store and surrounding area since occupying the unit, and implemented the extension.

Although there is still some potential for further improvement/intensification on parts of the site there are currently no proposals for this. There will be wider opportunities to integrate this site into the surrounding area when the Teville Gate / Station Gateway proposals come forward.

- **British Gas Site – Lyndhurst Road (Area of Change 7)** — this Area of Change relates to the site situated to north east of the main shopping area and directly to the east of Waitrose. The site is in a central location and is

¹ LPA ref AWDM/1636/14 / Appeal ref AWAP/0054/15

² LPA ref AWDM/1633/16

occupied by a redundant gasholder and depot buildings. Access to the site is via Park Street or the Waitrose car park. Additionally, the site is in private ownership. Although there have been no proposals for the site, it may be – subject to further testing – suitable for a mixed use scheme to include residential uses. A prior notification³ to demolish the gasholder has been submitted and approved.

- **Land Adjacent to Martlets Way (Area of Change 8)** — this Area of Change relates to the currently vacant 4 hectare site, to the direct north of Goring-By-Sea and northwest of Worthing. The site has three owners and was previously made up of West Worthing Waste Water (sewage treatment works), a British Gas holder and an open area of land. Access to the western part of the site is currently through the Goring Trading Area via Martlets Way. Providing access and land ownership issues can be overcome, the site presents an opportunity to deliver a mix of employment and residential uses.
- **The Warren – Hill Barn Lane (Area of Change 9)** — this Area of Change relates to 10,000 sq.m of floorspace, located at the north eastern edge of the borough. The site is accessible via Hill Barn Lane and has frontage onto the A27/A24. The site was previously occupied by Aviva, but was put on the market due to the company's relocation, but remained vacant for over 18 months.

It was accepted that a flexible approach was needed in respect of a range of employment generating uses, and an application to change the use of the site from offices to education was approved in May 2012. Worthing College has now moved to the site and the college was opened to students in 2013; additionally, development of 36 dwellings to the north of The Warren was approved to help fund the wider scheme, and this has also been delivered.

- **The Strand (Area of Change 10)** — this Area of Change relates to pockets of land around the suburb of Worthing, known as The Strand. Specifically the opportunities for change in the area focus on the former Worthing College, prior to their move to The Warren, and the former Lloyds TSB, The Causeway. The area includes a mix of uses and is close to the A259 and Durrington Station.

Under permitted development the former Lloyds tower has been converted to 68 flats. A subsequent application was permitted for a further 4 flats on the roof – now completed. Approval has since been granted for 74 flats and a doctor's surgery on the former site of the banking hall, and this work has commenced.

- **Northbrook College, Durrington and Broadwater Site (Area of Change 11)** – Northbrook College occupies two sites – at Durrington and Broadwater. At the time of adopting the Core Strategy the College had not announced its investment plans and, as such, the AOC was flexibly written to allow for different options for each (or both) sites.

Following the adoption of the Core Strategy the College announced its investment plan. This sought to retain both sites for college use but with surplus land at both locations developed to help raise money to fund the necessary improvements. This has resulted in:

Durrington Campus:

- Phase 1: 117 houses / car showroom / Guild Care dementia unit. Construction commenced in July 2013 and is now complete (Ref: AWDM/0521/12);
- Phase 2: Lower Northbrook Farm permission granted for 38 dwellings and Day Care Unit. Under construction (Ref: AWDM/0055/13);
- Phase 3: Permission granted for removal of existing college buildings and erection of 42 dwellings. Under construction (Ref: AWDM/0184/14).

Broadwater:

- As part of a £30m investment package for schools in Worthing the County Council granted permission for a 900 pupil Academy on land south of the existing College. Bohunt Education Trust sponsor the academy and the new £18m school building opened in September 2016.
- **Decoy Farm (Area of Change 12)** – This Area of Change consists of 7.7 hectares set on the eastern fringes of Worthing's major industrial estates. The site acts as a buffer between Worthing and Adur and was formerly a landfill area. The site has clear evidence of existing contamination and flooding problems, therefore because of this; the site has remained undeveloped, with no major applications for redevelopment submitted.

Due to the surrounding uses, the development site has been outlined as an area that could add to the overall supply of small industrial units as well other employment sectors, such as general industrial and larger warehousing. The site is unlikely to be suitable for residential use, given the environmental and flooding constraints, and contamination issues.

³ LPA ref AWDM/1949/16

- 2.17 Development proposals on these sites will have the support of the Council if they contribute towards delivering the Vision and Strategic Objectives of the Core Strategy and identified uses allocated to each site. In Areas 1-6, the Council will seek a mix of uses to include residential, retail and leisure cultural uses. This reflects the need for development of housing to be a key driver in achieving growth in the Borough.
- 2.18 In terms of regeneration, Core Strategy Policy 6, Retail identifies two prominent shopping areas of focus for redevelopment which include the Guildbourne Centre and incorporation of additional retail space in Union Place (Union Place Area of Change). This is to ensure the continued vitality and viability of the designated town centre within the retail hierarchy (see **Figure 2.2**) and to promote consolidation of the existing retail provision in Worthing town centre.
- 2.19 With regards to the existing hierarchy of town, district and local centres within the Borough, Core Strategy Policy 6, Retail, states the Council will continue to identify, protect and enhance the borough's network of town centres. Core Strategy Policy 6 'Retail', requires that the scale and function of the retail offer is appropriate to each centre within its level of the hierarchy and as such will ensure that district and local centres comprise of convenient and accessible shopping facilities which meet day to day needs of residents.

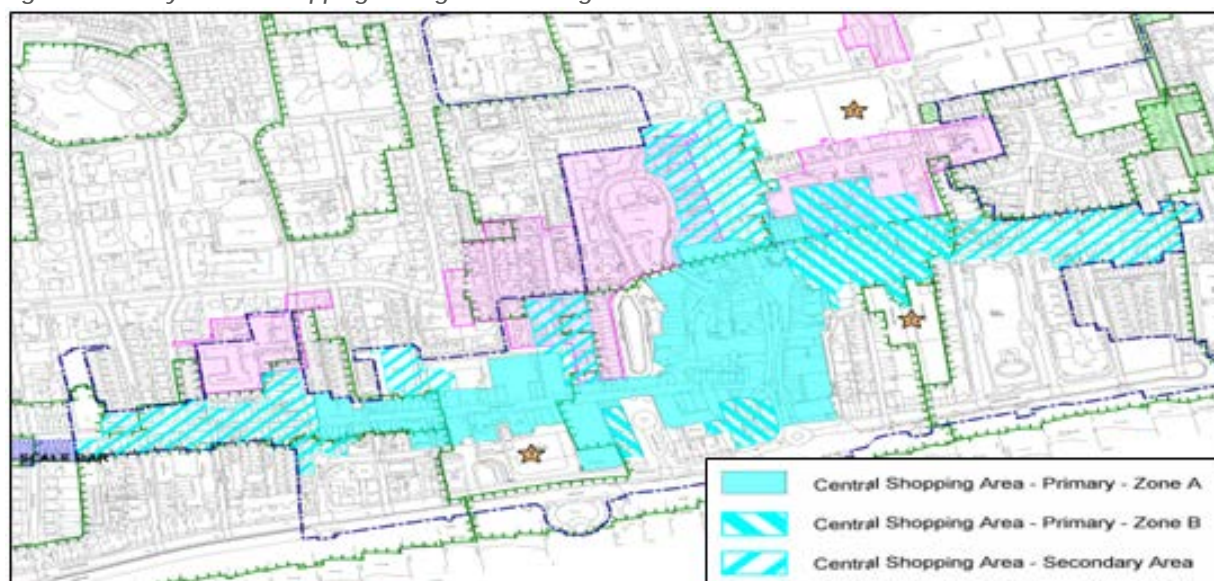
Figure 2.2: Worthing Borough Retail Hierarchy

Town Centre	To ensure that Worthing town centre continues to fulfill its sub-regional role, it is important to provide development that meets both quantitative and qualitative needs. New retail, leisure and office development will therefore, be directed to the town centre, although a significant amount of office development is expected to be out-of-centre.
District Centres	<i>Broadwater/Goring Road/West Durrington:</i> Development required to meet the needs of the area served by the centre, is of a scale appropriate to the centre and will not adversely impact on the vitality or viability of other nearby centres will be allowed.
Local Centres	Medium-scale local centres: <i>Findon Valley/Tarring Road/South Farm Road/The Strand/Thomas A. Beckett/Ham Road/Rowlands Road/The Mulberry.</i> Small-scale local centres: <i>Aldsworth Parade/Boxgrove/Broadwater Street East/Limbrick Corner/Lyndhurst Road/Manor Parade/Selden Parade/Alinora Crescent/Broadwater Road/Salvington Road/South Farm Road (North)/South Street Tarring/Brighton Road/Dominion Road/Downlands Parade</i> No proposed development will be allowed within these centres, unless it can be demonstrated that it is to meet local needs, is of a scale appropriate to the centre and will not adversely impact upon the vitality or viability of other nearby centres.

Source: Worthing Core Strategy (2011), Policy 6

- 2.20 In order to protect the retail function of Worthing town centre, Core Strategy Policy 6, Retail, seeks to encourage flexibility in the Plan policy without losing control over certain shopping frontages. Therefore the policy designates a Central Shopping Area and provides a distinction between Primary and Secondary Shopping Zones (see Figure 2.2) to address this. The Primary Shopping Zones are sub-divided into A and B zones, where A protects A1 uses and Primary Zone B enables a more flexible approach to A3/A4 uses. The Secondary zones are more flexible and encourage a mix of retail, commercial and cultural development uses (Plan 2). We discuss the continued robustness of the Council's Core Strategy policies in respect of retail and main town centre uses in Section 9 of this report.
- 2.21 Policy 5, The Visitor Economy promotes the retention, upgrading and enhancement of existing visitor attractions and the Council will support new tourist and leisure facilities, particularly those which focus on the town centre and seafront area. The policy indicates that the Council are looking to achieve a stronger tourism sector all year round and to reduce 'seasonality'. Accordingly, the Council plan to work in partnership with relevant stakeholders to promote the arts, creative industries and tourism sector to attract more visitors to Worthing town centre. Whilst it is not within the remit of this study to specifically review the tourism role of Worthing, it is recommended that the Council seek to carry forward a policy into its new Local Plan which seeks the diversification and enhancement of the visitor economy, as this will in turn deliver positive benefits to the overall vitality and viability of the town centre.

Figure 2.2: Policy-defined shopping frontages in Worthing town centre



Source: Worthing Core Strategy (2011) Proposals Map

A New Local Plan for Worthing – Emerging Policy

- 2.22 Subsequent to the adoption of the Core Strategy 2011, revisions to the planning system at national level and changes to the national economy, the document has become increasingly out of date. In response, Worthing Council is in the process of preparing a new development plan, called the Worthing Local Plan which will guide development in the Borough to the period 2033. This Retail and Main Town Centre Uses Study will provide part of the evidence to feed into the preparation of the new Worthing Local Plan.

Summary

- The NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA's to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- The Worthing Local policy framework seeks to promote the town centre and seafront as one integrated and combined destination, promoting linkages and integration between the two – primarily through the identification of key Areas of Change and opportunities to 'break-through' the built form to create new linkages.
- Areas of Change sites 1-6 are those most closely related to Worthing town centre and retail and commercial leisure uses. The Grafton Site (3) and Union Place South (4) are identified as key opportunities to accommodate commercial retail/leisure uses in and adjoining the town centre, and are identified under Core Strategy Policy 6 as the key areas of focus for redevelopment to accommodate retail floorspace.
- Teville Gate (5) and the Aquarena (1) are identified as key gateways to the town centre able to accommodate a mix of uses including large scale commercial leisure. The Stagecoach site (2) has greater physical constraints, but being located adjacent to the Dome Cinema, can be considered to offer potential for some retail/leisure uses.
- Core Strategy frontage policies aim to promote protection of core A1 retail uses whilst also ensuring flexibility to accommodate a mix of other town centre uses (A2-A4) elsewhere. This policy framework pre-dates changes to Permitted Development legislation and must be reviewed as part of this evidence base.

3 Study Context

- 3.1 In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in Worthing.

A return to growth – but a slowing recovery

- 3.2 Analysis published by Experian identified that following several years of subdued performance, including the period of recession; a ‘strong economic upswing’ subsequently took place, driven by increases in consumer spending and business investment.

- 3.3 In their Retail Planner Briefing Note (November 2016), Experian comment that:

‘The UK recovery has continued into 2016. However, there has been some moderation to the pace of upswing since 2014... the recovery has become increasingly reliant on consumer spending as investment has slowed. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year’.

- 3.4 In terms of future projections of consumer spending, Experian’s outlook is noticeably cautious, stating that:

‘We expect consumer spending to begin to weaken over 2017, suffering from higher inflation in the wake of the steep fall in the sterling’s exchange rate since the referendum. Wage growth remains modest and is likely to be overtaken by higher inflation, which in turn will constrain spending power’.

- 3.5 Experian conclude that ‘the outlook for the next two years for the UK economy has weakened significantly following the Brexit vote’. In the medium term, Experian consider that ‘the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude, and in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans’.

- 3.6 There has therefore been a return in confidence to consumer spending in recent years, which offers potential for strongly-performing town centres to capitalise on, although the most recent guidance from Experian suggests that this recent return to confidence is now being challenged by the uncertainty arising from the referendum vote in June 2016 — as well as other changes in the retail sector which we discuss below.

Changing Retailer Space Requirements

- 3.7 During the recession retailers’ margins were squeezed, and whilst other costs continued to increase, a raft of multiple and independent retailers collapsed or significantly reduced their store portfolios. Post-recession, retailers are feeling an increasing pressure to be continually updating their image and product to compete in the market, as evidenced by the recent collapse of British retailers BHS and Austin Reed and the proposed closure of approximately 30 UK stores by Marks and Spencer.

- 3.8 Retailers are reacting to market drivers and subsequently adapting to meet these market requirements. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. Whilst Worthing is perhaps not a higher order ‘strategic’ location/town centre, it remains a large town centre with a regional/sub-regional influence, and should aspire to attract flagship and/or smaller satellite stores, although current levels of demand from comparison goods operators for Worthing appear relatively limited (see Section 5). Many operators are continuing to close stores in less-profitable locations, particularly smaller centres, as leases expire in response to a rise in rental values.

- 3.9 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, often supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This ‘polarisation’ of retailing is enabling larger dominant centres to continue to

attract key flagship formats, and can pose a particular challenge to smaller and medium-sized centres, where there are higher order centres in close proximity. Brighton is an example of a successfully functioning, higher-order centre which benefits from a well-developed retail offer (including an extensive specialist retail offer), although the centre also suffers from issues of a lack of larger-format floorspace. The sheer size, range and depth of the retail offer in Brighton is not something that Worthing will be likely to directly compete with on account of the smaller physical size of the town centre, the more limited range of larger-format units, and a more limited comparison goods shopping catchment relative to Brighton. However, we set out in Section 5 a number of aspirational retailers which Worthing could, over time, seek to attract to broaden its retail offer. Several of the retailers which we are identify are already trading in Brighton but could potentially seek additional representation if a sufficiently attractive catchment and demographic were to evolve.

- 3.10 An often inevitable consequence of the above ‘polarisation’ trend is that smaller and medium-sized centres become home to more, value-orientated retailers – i.e. Poundland, Wilko, Primark – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. Such is the case with Worthing, which hosts a significant proportion of discount retailers — including a recently-opened Poundworld Extra in the former BHS unit — and lacks a strong representation from higher quality retailers.
- 3.11 Worthing appears to have weathered reasonably well since the occurrence of the global recession in 2008, although it could be performing more strongly in terms of its primary shopping offer. Despite the fact that the town centre recently lost BHS and is soon to lose Next to an out-of-centre location near Rustington, the town centre retains a selection of prominent high street retailers including Debenhams, Topshop, New Look, River Island and H&M in its Central Shopping Area. However there are a significant number of discount/budget retailers trading in the town centre, including from large units — the former BHS unit (approximately 1,600 sq.m net) which is now occupied by Poundworld Extra is an example of where Worthing needs to be proactive and harness these types of opportunities to draw in higher quality retailers in order to compete.
- 3.12 Positively, Worthing has managed to retain its specialist comparison offer and has also begun to boost its commercial leisure offer through the introduction of a number of good quality independent A3/A4 food and drink establishments including drawing in national operators such as Slug & Lettuce. Food and drink operators who are expected to occupy units in the near future include Patisserie Valerie, Nando’s and Carluccio’s as part of the recently-approved Montague Place redevelopment in the town centre. There have also been a number of new openings by independent operators, which help add to the diversity of the town centre and provide options for those customers not wishing to visit national chains. Current forecasts from Experian suggest that growth in commercial leisure spending, and in particular on food and drink, is likely to be strong in the short-to-medium term and therefore there is likely to be an increasing amount of expenditure available to support further growth of these uses, particularly if the affluence of Worthing town centre’s catchment increases.

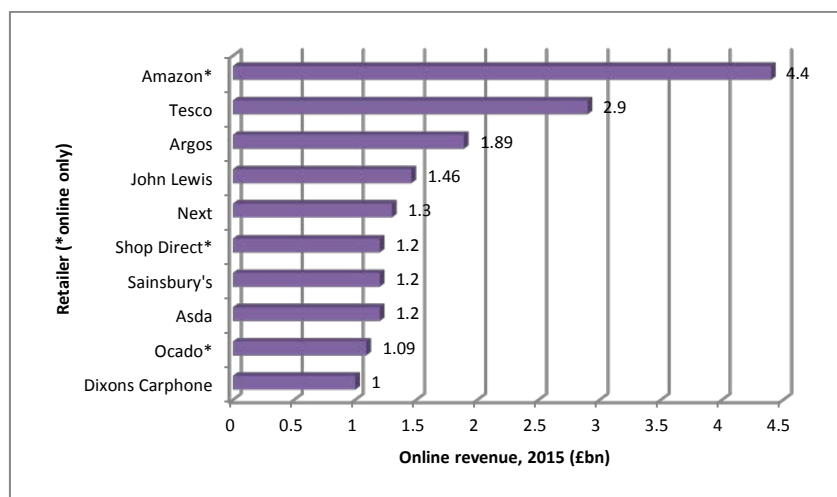
Internet Growth & Multichannel Retailing

- 3.13 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better ‘browsing’ experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.
- 3.14 The ‘Click and Collect’ market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict comment that ‘the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement’. As such, understanding the ‘shopper mentality’ and striking a balance between attracting in-store buyers and virtual shoppers is vital.
- 3.15 It is clear that ‘Click & Collect’ is an important tool which can support the role and function of town centres and has great potential to generate increased footfall. Creating improvements to this service, by way of in-store tablets, ipads and up-to-date ordering systems will only be beneficial. ‘Click & Collect’ can also be facilitated through secure locker collection point facilities, such as the Amazon Lockers which are installed in the Montague Centre, for example.
- 3.16 Many national retailers now operate ‘Click & Collect’ facilities, with examples in Worthing including Sainsbury’s Lyons Farm Retail Park; Tesco Extra West Durrington; Waitrose High Street; and Argos on Montague Street. It is noteworthy that of the top ten online retailers in 2015, seven have a physical presence on the UK High Street, and all of these offer ‘Click & Collect’ facilities (Figure 3.1). Of these, four are currently trading in Worthing outside the main town centre

(Tesco, Waitrose (for John Lewis), Sainsbury's, Argos) and another Argos is trading in the town centre at Montague Street.

- 3.17 Despite being a relatively new concept for the retail sector to embrace, 'Click & Collect' is therefore affirming that physical stores can continue to have a role in the multichannel shopping environment. Further to this, the significant rise in the number of discount stores (i.e. Wilko, Sports Direct, Poundland), some of which do not have well developed internet sites indicates that online retailing is not always key.
- 3.18 The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition. The 'Click & Collect' phenomenon can be expected to drive an occupier desire to maintain a representation of physical store units across town centres.

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also has Click & Collect facilities available via Waitrose stores

The Role of the Town Centre

- 3.19 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on), and the popularity of retail parks, many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the final quarter of 2015⁴, emphasising the need for centres to offer as broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.
- 3.20 As previously stated, Worthing is managing to position itself as a town centre which is delivering an increasingly better quality restaurant, café and bar offer within the town centre. Our health check assessment of Worthing town centre (Section 4) confirms this and goes into more detail with regards to where these leisure uses are located.
- 3.21 Enhancing the non-retail offer so town and district centres function as more than just retail locations will help drive footfall, increase dwell time and ultimately promote the viability of the town centre. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness. This is especially important to bring back the footfall which is being lost to internet shopping.
- 3.22 In Worthing there is potential to further enhance the town centre and existing retail offer through integration with and increased accessibility to the seafront. There is an opportunity for the seafront to be a unique selling point which in turn raises the profile of Worthing as a successful seafront town and help to strengthen the retail and leisure offer. Brighton, is an example of a centre which successfully plays to its strength of being a popular day-trip and seaside resort destination. It has become known for its high quality and extensive retail and leisure offer in addition to its art scene

⁴ Source: British Retail Consortium, January 2016

and its internationally renowned festivals. In comparison, Worthing fares lower in terms of its overall town centre provision and its consequent popularity with visitors and tourists.

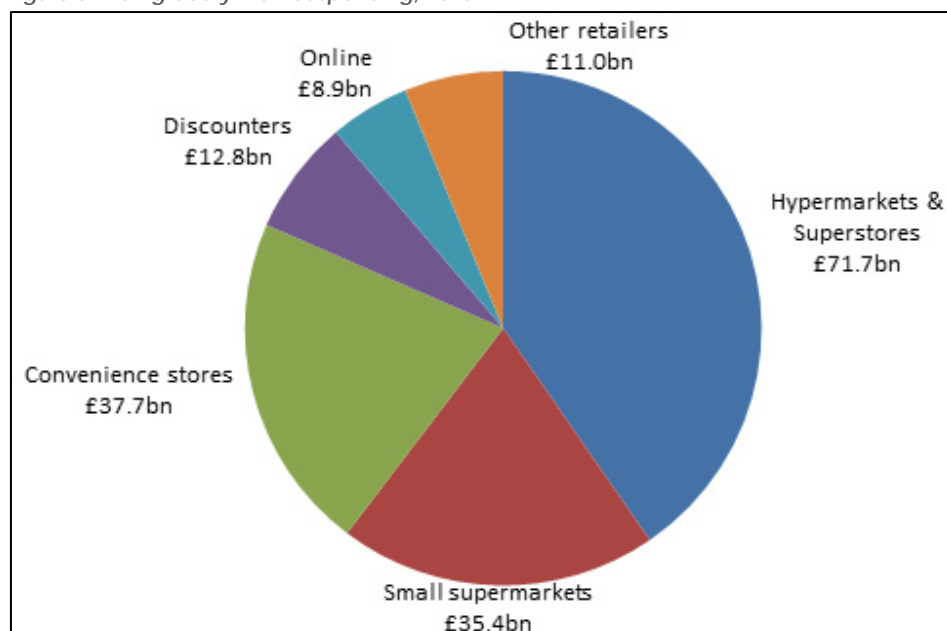
- 3.23 Delivering a mix of town centre uses to enhance the attraction of a centre should form a part of the key strategy to increase frequency of visits and dwell time. Another vital component to making town centre more attractive to shoppers and visitors will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives.
- 3.24 Worthing is taking steps to improve its public realm through preparation of a public realm strategy and car parking strategy to encourage a more 'walkable' town centre and to attempt to pull in more shoppers and higher end retailers. Worthing Council has also been working in partnership with West Sussex County Council to deliver town centre improvements to Montague Place. Phase 1 of the works have been completed and have introduced a modern bandstand; an enhanced open space for public events; improved, more durable public paving including LED lighting and wayfinding; installation of new street furniture; and removal of dated seating. Worthing Borough Council and West Sussex County Council are working on an investment prospectus to secure funding for a second phase of the project, which will include pedestrianisation of Montague Place and part-pedestrianisation of Portland Road. These improvements are a positive step towards realising the Council's desire to create a link between Montague Place and the town centre as envisioned originally within the Worthing Town Centre and Seafront Masterplan (2006).
- 3.25 Worthing Council also published an 'Investment Prospectus' in 2016 to help attract inward investment into the town centre. The Investment Prospectus sets out the Council's vision for the key opportunity sites in the town centre (as discussed in the previous section), as well as identifying public realm improvements such as Montague Place, and sets out how the Council and other local partners will support investment in the centre.
- 3.26 A number of town centres have sought to establish partnerships which seek to develop support and promote their town centres. Quite often, these take the form of Business Improvement Districts (BIDs). Typically, BIDs levy an additional charge on top of business rates which fund events and schemes within town centres to enhance their attractiveness as shopping destinations. The levies typically range between 1-1.5%, of the rateable value of businesses in the area.
- 3.27 Worthing first proposed the Worthing Business Improvement District (BID) in July 2007 and in this period £1 million of funding was invested into improving the town centre boosting footfall in 2011 by 10.4% in comparison to the national average which saw a decline in footfall of 11% (source: Worthing Town Centre Initiative), although data provided by the Worthing Town Centre Initiative suggests that footfall in the town centre has more recently experienced a decline (see Figure 5.7, Section 5). The BID runs for a five year period and subsequently Worthing is now in its second term which started in April 2013 and will run until 31st March 2018. The Worthing Town Centre Initiative is currently working on the third term business plan and proposal which will go to ballot in October 2017. If successful it will run for a period of 5 years from 2018 to 2023.

The Convenience Sector

- 3.28 The convenience goods market has witnessed a fundamental change in shopping patterns in recent years, as people increasingly prefer to shop more frequently in smaller-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-operative, Marks & Spencer Simply Food and Little Waitrose. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrison's announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016.
- 3.29 The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and both are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. This study identifies that Lidl is one of the best performing stores in Worthing and the Council has advised us that Aldi is also keen to secure representation in the Worthing area. There has also been growth at the 'premium' end of the convenience goods market, with both Waitrose and M&S Food growing store numbers (with both retailers being represented within Worthing), although both Waitrose and M&S have also recently stated intentions to close a small number of underperforming stores.
- 3.30 **Figure 3.2** (below) shows the composition of the convenience goods sector in 2015, based on data collected by The Institute of Grocery Distribution (IGD). IGD estimate that the UK grocery market was worth £177.5bn in 2015, and of this 'convenience stores' (defined by IGD as stores under 280 sq.m net) claimed £37.7bn (21.2%). However, as Figure 3.3 shows, notwithstanding the unquestionable growth in the popularity of 'convenience' stores, most of the food

shopping spend is still accounted for by larger-format stores — £71.7bn was spent in ‘hypermarkets and superstores’ (stores over 2,320 sq.m net) in 2015, and a further £35.4bn in ‘small supermarkets’ (stores between 280 and 2,320 sq.m net).

Figure 3.2: UK grocery market spending, 2015



Source: IGD UK Grocery Market and channel forecasts 2015-20. Data is for year to 31st March 2015.

- 3.31 There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, and indeed these remain the principle format of convenience goods shopping for the borough, but more widely speaking operators are opening more, smaller format stores than was the case at the time of the Council's previous evidence base studies. Operators with ‘hyper-market’ format stores (over c.5,600 sq.m net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury's are trialling Argos concessions, and branches of Tesco Extra include either concessions from retailers such as Holland and Barrett, Dorothy Perkins and Burton.
- 3.32 These examples confirm that there remains appetite from foodstore operators to open new stores where suitable opportunities arise, although the size of foodstores being committed to is generally less than has previously been the case. We expect the ‘big four’ retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Figure 3.3: Lidl, North Street, Edge of Worthing Town Centre / Figure 3.4: Sainsbury's, Lyons Farm Retail Park, Worthing



Out-of-Centre Retailing

- 3.33 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 3.34 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M.
- 3.35 Retail parks in Worthing are generally focused on the more bulky goods categories, but such destinations are continually seeking means to adapt, and the Council should be cautious in respect of town centre competition and the creation of 'destination' shopping. Worthing town centre is experiencing competition from out-of-centre retail parks beyond the borough boundary including, for example, the Holmbush Centre at Shoreham and Goldstone Retail Park in Hove.

Figure 3.5: Next at Home, Holmbush Centre, Shoreham-by-Sea



Commercial Leisure

- 3.36 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Increasingly consumers are choosing to spend their money on 'experiences' such as dining, health and beauty and the cinema rather than clothing and objects. Research suggests that shopping has become part of a wider leisure outing experience for town centre visitors instead of being the sole reason for why they would choose to visit a town centre. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes. Margate is an example of a town which has invested a substantial amount of money into restoring its seafront leisure facilities, while Hastings and Rye capitalise on their heritage assets to boost tourism alongside their town centre retail offer.
- 3.37 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. In recent years, expansion in the restaurant sector has been driven by 'casual dining' operators such as Byron, Giraffe, GBK, Wagamama, Carluccios and Pizza Express. Worthing town centre has attracted some of these

operators, however there is still an opportunity to attract more of these types of commercial leisure retailers to the town centre in order to diversify the current offer and encourage an increased level of footfall.

- 3.38 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers, albeit more slowly outside of London. Worthing has experienced in recent years a rise in its 'café culture' scene with a number of large chains and smaller independent operators setting up in the town centre, particularly in Warwick Street, Montague Place and Bath Place.
- 3.39 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that 'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub' (our emphasis). The report goes on to identify 'the need to improve the leisure and food and beverage offer, and to develop the evening economy through restaurants and in-town cinemas'.
- 3.40 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline has continued at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon (operator of The Three Fishes in Worthing⁵) have achieved sales growth in recent years and continue to undertake modest expansion. The popularity of specialist pubs offering craft beers and local ales also remains strong, and this is a trend which is now becoming popular in other urban areas.
- 3.41 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym (none of which currently have a facility within Worthing, although we understand a new 24hr gym has recently opened on Chapel Road). This new type of facility aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer. Although no large budget gyms are currently located in the town centre, we understand from the Council that a large operator is currently considering locating in the Guildbourne Shopping Centre.
- 3.42 The cinema market is also continuing to perform strongly, and in recent years has overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK.
- 3.43 Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate complementary 'family dining' restaurants such as Nando's and Pizza Express, as well as coffee shops, enabling them to act as leisure 'destinations' in their own right. For example, Cineworld has experienced substantial growth over the past few years acquiring Picturehouse in 2012 and opening eight new sites since 2015; Odeon has opened fewer new sites (six since 2012) but also continues to open in smaller centres, such as Llanelli and Trowbridge. Everyman and Curzon cinemas offer a more 'boutique' cinema experience and generally gravitate to smaller and medium size town centre locations.

Summary

- The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. Whilst confidence is now returning to consumer spending — particularly in terms of comparison goods spending — the growth in online shopping, including multi-channel retailing, acts as tough competition for the high street. It also however presents an opportunity for the high street to capitalise, by

⁵ JD Wetherspoon operated a second public house in Worthing, the Sir Timothy Shelley, however this closed in early 2017 following the sale of the freehold to the building. It is understood a restaurant operator will take over the site.

maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences. A number of the stores in Worthing are utilising the click and collect approach in order to draw in shoppers both online and in store.

- Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Many retail parks are seeking to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times. Worthing currently is experiencing competition from out of centre retail parks and will need to continue to strengthen its own retail offer to remain competitive.
- Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets including cinemas, arts venues, cafés, bars and restaurants to increase length of stay and spend.
- It will be important, therefore, for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place. Worthing has already made steps in the right direction towards achieving a multifaceted town centre offering retail, leisure and cultural facilities.

4 The Sub-Regional Context

- 4.1 This section examines the retail performance of Worthing town centre in the context of the retail network across the wider sub-region and examines the influence of key competing strategic centres on the current and future role of the Borough's retail hierarchy.
- 4.2 Our analysis draws extensively on the household telephone survey data, which underpins the entire retail/town centre study, and a number of other published data sources referenced where relevant. These identify the main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence future shopping patterns in the region. Qualitative research was also undertaken to establish major pipeline development proposals in competing centres.
- 4.3 Worthing is located central to the survey area and is the most dominant and influential centre within this catchment. Worthing town centre has a comparison goods trade draw of £292.5m from the household telephone survey area which we have used as the basis of our study (see **Plan 1**). The comparison goods trade draw of £292.5m is equivalent to 24.3% of the total available comparison goods spend available to the survey area. The remaining available comparison goods expenditure is spent at a variety of competing destinations across the sub-region, with those attracting the highest amount of comparison goods spend being:
- **Brighton** (£95.1m of comparison goods spend from survey area)
 - **Horsham** (£56.5m of comparison goods spend from survey area)
 - **Holmbush Centre, Shoreham-by-Sea** (an out-of-centre development with large branches of M&S, Next Home & Garden and Tesco Extra) (£68.0m of comparison goods spend from survey area)
 - **Shoreham-by-Sea** (£49.6m of comparison goods spend from survey area)
 - **Chichester** (£40.4m of comparison goods spend from survey area)
 - Smaller amounts of comparison goods spend are also directed towards other locations including **Central London, Crawley, Guildford and Burgess Hill**. In each of these cases the amount of comparison goods spend is under £10m.
- 4.4 Brighton, Horsham and Chichester all have a comparison goods retail offer which can be considered to be of a sub-regional nature, meaning they draw trade from a wide catchment, including exerting a considerable influence of the shopping patterns of residents in Worthing Borough. We present a review of the retail and leisure offer in these centres below, before discussing the offer of Worthing itself in greater detail in the following section. We do not consider Shoreham in detail as whilst it acts as a popular comparison goods shopping destination for many residents in the survey area, this is largely a reflection on its proximity to the survey area.

Brighton

Venuescore Retail Ranking⁶: 6 | Trade draw from survey area: £95.1m / 7.9% market share

- 4.5 Brighton is approximately 16.5 km east of Worthing. Brighton is identified as a Regional Centre in the Brighton and Hove City Plan (Part One). A renowned tourist, cultural and shopping destination, Brighton has a strong reputation for its specialist and independent retailers alongside its multiple retail shopping offer. Venuescore ranks Brighton in 6th position in the 2014-2015 Index and identifies Brighton's market position as 'Upper Middle'. The Experian Goad category report for Brighton (2016) identifies a total of 221, 950 sq.m of total retail floorspace across 1,158 retail units.
- 4.6 Brighton offers a number of shopping areas including the Lanes, Brighton Marina, Brighton Churchill Square and Western Road and North Laine. Brighton is predominantly performing a comparison shopping function that is generally performing in line with the national average both in terms of unit count (+5.23%) and floorspace (+0.17%). Brighton offers both high street retail shops such as H&M, Primark, River Island, Next, H&M, Topshop and New Look in addition to

⁶ Venuescore is an annual survey compiled by Javelin Group, which ranks the UK's top 3,500+ retail venues (town centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on a number of factors including scale of offer, presence of key attractors/ 'anchor' stores and market positioning (a 'lower' market position indicates a value/discount-orientated retail offer, whilst an 'upper' market positioning indicates an upmarket/quality/exclusive retail offer). In reality, most centres fall within the 'upper middle', 'middle' or 'lower middle' market positions, depending on how diverse the quality of their retail mix is.

higher quality retailers such as Hotel Chocolat, Whistles, The White Company, Reiss, Hugo Boss, Levi's, Jaeger, Jigsaw and Joules.

- 4.7 The Churchill shopping centre is located in the town centre and hosts over 80 shops, restaurants and cafes, including two car parks offering a 24 hour 365 day service a year (1,600 total car parking spaces). Retail tenants who anchor the shopping centre include Debenhams, Zara, and Topshop, Next and HMV. Specialist and independent retail operators can be found at London Road and Open Market, north of the city centre, and Kemptown which is located east of the city centre.
- 4.8 In terms of its commercial leisure offer, Brighton is dominated mainly by independent eating and drinking establishments in addition to main stream operators such as Bella Italia, Pizza Express, Ask Italian, The Breakfast Club and Be at One. Cultural leisure facilities include an Odeon Cinema, The Brighton Centre Theatre, Theatre Royal Brighton and a number of fitness centres, casinos and social clubs.

Out of Centre Retail in Brighton

- 4.9 Hollingbury Retail Park is located approximately 4.90km north of Brighton and comprises Matalan and Brantano Footwear, Marks and Spencer, Next and Argos. Brighton Marina is located east of Brighton town centre and offers a strong commercial leisure offer including a Cineworld cinema, Bowlplex Bowling and a number of A3/ A4 uses including operators such as Pizza Express, Frankie and Benny's, Nando's and Five Guys Burgers.

Planned Development and Regeneration

- 4.10 There has been a significant amount of change in Brighton in recent years and further regeneration is proposed. Outside of Brighton Regional town centre, planning permission was granted in July 2006 at Brighton Marina (BH2006/01124) for 853 new homes, 1,933 sq.m Class A retail floorspace and community uses. Phase 1 is complete and Phase 2, comprising of approximately 240 additional apartments, is currently under construction.
- 4.11 Another redevelopment scheme to include retail, outside of the regional town centre is the redevelopment of Preston Barracks. The £150 million scheme on Lewes Road is part of a wider regeneration project and proposals will deliver a mix of uses to include 2,300 sq.m of retail space. There is also a pending application (BH2015/02789) for a change of use to provide a mixed use development at Preston Road to include 366 sq.m of Class A1 and 52 sq.m of A3/ A4 retail use.

Horsham

Venuescore Retail Ranking: 125 | Trade draw from survey area: £56.5m / 4.7%

- 4.12 Horsham is approximately 28km north of Worthing and is identified as the 'Primary' town centre in the borough, according to the Horsham District Planning Framework (2015). Horsham benefits from a strong comparison goods offer in addition to offering a significant range of employment and leisure facilities. Venuescore ranks Horsham in 125th position in the 2014-2015 index ranking and places the Primary town centre in the 'Upper Middle' market position classification. The Experian Goad category report for Horsham identifies a total of 90,041 sq.m of total retail floorspace spread across 371 retail outlet shops.
- 4.13 The centre hosts national multiple retailers including Marks and Spencer, Wilko (both located in the Swan Walk Shopping Centre), TK Maxx, Next, Clarks and Argos. The majority of the retail offer comprises of high street shops as opposed to high quality or boutique retail shops, however there is a good range of specialist retail shops which can be found in Piries Place covered shopping area. When measured against the Experian Goad indexing system, Horsham's comparison shopping performs above that of the UK national average both in terms of floorspace (+14.58%) and unit count (+7.53%).
- 4.14 Horsham has a good offer of restaurants and cafes, although according to the Experian Goad report for Horsham (2015), the town centre is performing below the UK national average (-10.3% below UK national average floorspace). Food and beverage retailers who are operating in the town centre include Costa, Pret a Manger, Caffè Nero, Bill's, Nando's, Prezzo, Wagamama, Cote Brasserie, Ask Italian and Pizza Express. These large chain retailers are supplemented by a number of independent eating and drinking establishments. The focus for food and beverage offer in Horsham is positioned mainly around East Street which has benefitted from significant investment in the public realm in recent years and in turn has become an eating and drinking destination for the town centre.
- 4.15 Within walking distance of East Street is the Capitol Horsham Arts Complex on North Street which compliments the commercial leisure offer of Horsham.

Out of Centre Retail in Horsham

- 4.16 Tanbridge Retail Park is located within walking distance of the town centre to the west and hosts Curry's/ PC World and Staples. John Lewis at Home and Waitrose are located just north of the Retail Park at Albion Way. The £11m John Lewis/ Waitrose at Home development led by the John Lewis Partnership (opened June 2015) is the most significant development for the town centre in recent years. This development has increased the shopping opportunities for individuals within and outside of the borough. Customers now have access to approximately 16,000 products and a click and collect service at John Lewis, while the Waitrose offers a juice bar, wine and beer bar and a bakery and café.

Planned Development and Regeneration

- 4.17 A planning application (ref no. DC/16/1371) was submitted in June 2016 for an extension to the Swan Walk Shopping Centre for 1,641 sq.m Class A1 floorspace, 1,581 sq.m Class A3 floorspace, 2,176 sq.m Class D2 floorspace and other floorspace of 1,792 sq.m. The proposals include reconfiguration of the existing internal floorspace to allow for a new large format comparison retail store, five new Class A3 units and a new cinema which will be integrated into the existing shopping centre. To date, a decision has not yet been made for this planning application.
- 4.18 Plans have also been proposed for the redevelopment of Piries Place including new shops, restaurants and an 'Everyman' boutique style cinema. Piries Place is positioned in the town centre, just south east of the Swan Walk Shopping Centre.

Chichester

Venuescore Retail Ranking: 84 | Trade draw from survey area: £40.4m / 3.4%

- 4.19 Chichester is identified in the Chichester Local Plan (2015) as a Sub-regional Centre and it is located approximately 29km north west of Worthing. Chichester is functioning predominantly as a comparison retail shopping destination. Venuescore ranks Chichester in 84th position in 2014-2015 Index and identifies Chichester's market position as 'Upper Middle'. The Experian Goad category report for Chichester (2015) identifies a total retail floorspace for Chichester of 82,260 sq.m across a total of 447 retail units.
- 4.20 The comparison shopping offer comprises of an excellent range of both high street retailers (New Look, Clarks, Next, River Island, TK Maxx, and Topshop) in addition to high quality retailers such as The White Company, Jacques Vert, Jaeger, L'Occitane, Moss, Molton Brown and Phase Eight. Experian Goad index ranks Chichester well above the UK national average both in terms of retail unit count (+16.05% above) and floorspace (+15.20% above).
- 4.21 Experian Goad ranks the commercial leisure offer of Chichester below that of the UK national average (-4.44% below), and accordingly the town centre offers a fairly limited range of good quality eating and drinking establishments. Large restaurant chains include Ask Italian, Carluccio's, Brasserie Blanc, Wagamama and Pizza Express which are supplemented by a selection of independently run restaurants and in addition to this there is a dominant café/ coffee shop scene.

Out of Centre Retail in Chichester

- 4.22 Chichester Gate Leisure Park is located south of the town centre within walking distance and plugs the gap in terms of eating and drinking and leisure facilities. The Retail Park comprises of a Cineworld cinema, MFA Bowl, Nuffield Health fitness centre in addition to Nando's and Gourmet Burger and lower quality chains including McDonald's, Mucho Burrito, KFC, Frankie and Benny's and Dominoes.

Planned Development and Regeneration

- 4.23 Plans for major redevelopment at Southern Gateway to include residential accommodation, retail and leisure uses and public realm improvements are currently underway. If this project is taken forward it will be one of the largest and most significant development projects to date in Chichester town centre and will see the area transformed.

Summary

- Worthing is the most dominant town centre within the survey area, achieving a market share within Zone 1-5 of 24.3%. In respect of the main sub-regional competing centres, Brighton draws 7.9% and is most dominant in Zone 5, Horsham draws 4.7% of trade primarily from Zones 3 and 4, whilst Chichester draws 3.4% of trade and is most dominant in Zone 2 and to a lesser extent Zone 3.

- Competition with Worthing is set to increase following the construction of additional retail floorspace at Brighton Marina and Preston Barracks; an extension to the Swan Walk shopping centre in Horsham to include a new cinema and flagship shop unit; the redevelopment of Pirie's Place in Horsham to include a new 'Everyman' boutique style cinema; and major redevelopment to include residential, retail and leisure uses at Southern Gateway in Chichester.

5 Worthing town centre audit

- 5.1 Worthing is a large seaside town in West Sussex, situated beneath the South Downs and approximately 10 miles west of Brighton and 50 miles south of London within the populous Worthing/Brighton and Littlehampton conurbation. The A24 serves the main town centre which travels north linking directly to the M25, while the A27 links Worthing with the east and west portions of the conurbation. Worthing mainline railway station serves the town centre and provides direct services to Clapham Junction in c. 1 hour 15 minutes.
- 5.2 Worthing Town Centre is the major town centre within the borough, and the focus for main retail and commercial leisure uses. The primary concentration of national multiple retailers is located at the junction of Warwick Street and South Place, and Montague Street. Montague Street is the longest pedestrianised shopping parade in the town centre, lying adjacent to Marine Parade and Worthing's key asset – the seafront.
- 5.3 The key access route into the town centre is via Teville Road which merges with Chapel Road and leads towards the heart of Worthing town centre. Two shopping centres are located within the town centre: the Guildbourne Shopping Centre and the Montague Centre.
- 5.4 In order to successfully assess the current day health of Worthing town centre it is relevant to consider the findings of previous studies. The following paragraphs draw out key findings from the 2010 Retail Study Update undertaken by DTZ and the 2009 Supporting the Retail Core Development Brief 2009 document prepared by GVA.
- 5.5 Both the 2010 study and the preceding 'Supporting the Retail Sector in Worthing Town Centre' (2009) study, named national multiple retailers including Debenhams, Next (who closed their town centre store in April 2017⁷), Mothercare (who are closing their store in October 2017), BHS (now closed⁸), Marks and Spencer and Boots as being present in the centre. Similarly both studies agreed that Worthing was not performing strongly in terms of its primary retail offer and lacked representation from higher quality retailers (particularly clothing and shoes) like those seen in neighbouring competing town centres (i.e. Brighton).
- 5.6 Further to this, the 2009 study acknowledged that Worthing has a concentration of small, poorly configured and outdated retail units, especially within the retail flagship/anchor stores. Despite this, Worthing was said to benefit from a relatively good secondary and tertiary retail offer, encompassing the niche retail and café operators of Warwick Street and specialist shops situated on Brighton Road.
- 5.7 At the time of the 2010 study the proportion of total vacant street level outlets totalled 66 units, equating to approximately 7% of total floorspace (-2.5% below the UK national average). This suggests at the time vacancy levels were relatively manageable, which was a positive position to be in given the economic difficulties in 2010. Vacant units were apparent around Montague Street, Warwick Street and Union Place.
- 5.8 In terms of pedestrian flow, the 2009 retail study stated that the footfall across the majority of the town centre was fairly light with the exception of the pedestrianised end of Montague Street to the west, where a concentration of pedestrians was evident. It was noted that the footfall dramatically increased outside of the BHS and the Optical Express units and that footfall was lower on quieter peripheral streets.
- 5.9 With regards to capacity for convenience goods, the 2010 study identified that there was scope for an increase in convenience shopping floorspace of up to 3,250 sq.m net by 2016. For comparison shopping, capacity for additional comparison goods floorspace was identified over the forecasting period (26,700 sq.m net sales for comparison goods by 2016).
- 5.10 The remainder of this section will consider a range of indicators as specified in paragraph 5 of the PPG. The health check for Worthing will be principally informed by, inter alia:
- The most recent Experian Goad Summary Report for Worthing (February 2016);
 - Our own on-site survey of Worthing Town Centre (October 2016);

⁷ Next closed Worthing town centre to move to a new, larger out-of-town store at Rustington, near Littlehampton. The new store will commence trading in May 2017. At the time of preparation of this study, the Next store had not been re-let.

⁸ The BHS store closed as a consequence of the retailer entering administration, resulting in the closure of all BHS stores across the county.

- The results of a bespoke household telephone survey (September 2016) undertaken by NEMS;
- Relevant policy documents;
- Supporting the Retail Sector in Worthing Town Centre (October 2009); and
- Relevant planning applications and permissions.

Diversity of Uses

- 5.11 Based on the latest survey undertaken by Experian Goad (February 2016), Worthing town centre currently comprises of 120,151 sq.m gross retail and service floorspace across 528 occupied units (58 vacant). **Tables 5.1 and 5.2** below set out the diversity of retail and service units in Worthing town centre compared to national average diversity of usage data (also provided by Experian), both in terms of the average mixture of uses in city, town and district centres across the country (Table 5.1) and the average amount of floorspace given over to these uses (Table 5.2).

Table 5.1: Worthing Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Convenience	50	8.53	8.65	-0.12
Comparison	211	36.01	31.87	+4.14
Leisure	136	23.21	23.44	-0.23
Service	73	12.46	14.01	-1.55
Financial and Business Service	58	9.90	10.62	-0.72
Vacant	58	9.90	11.12	-1.22
Misc.	0	0	0	0
Total	586	100	100	-

Source: Experian Goad Category Report (February 2016).

* According to Experian Goad, the vacant upper floor of the Guildbourne Centre is not included within the vacancy unit count.

Table 5.2: Worthing Composition of Uses (floorspace sq.m gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Convenience	15,282	12.72	15.22	-2.5
Comparison	50,706	42.20	35.84	+6.36
Leisure	30,518	25.40	24.51	+0.89
Service	6,911	5.75	6.73	-0.98
Financial and Business Service	8,779	7.31	7.98	-0.67
Vacant	7,952	6.62	8.99	-2.37
Misc.	0	0	0	0
Total	120,151	100	100	-

Source: Experian Goad Category Report (February 2016). Figures may not sum due to rounding and floorspace conversion (sq.ft to sq.m).

* According to Experian Goad, the vacant upper floor of the Guildbourne Centre is not included within the floorspace composition figures.

- 5.12 Convenience goods provision in Worthing is below that of the UK national average, in terms of the proportion of the total number of units (in % terms) given over to this type of use in the centre. Convenience uses account for 8.5% of total units (compared with the national average of 8.6%). These figures include the edge-of-centre Waitrose foodstore, reinforcing the lack of convenience retailing within the 'Primary Shopping Area'. 'Town centre' foodstores include an M&S Simply Food (1,068 sq.m net) Tesco Express (circa 500 sq.m net), Iceland (circa 500 sq.m net) and Co-op (circa 22 sq.m net).
- 5.13 Whilst these smaller convenience stores add to the diversity of the town centre offer, the limited floorspace reinforces the role of food shopping as a secondary, top-up function, likely to be supported predominantly by 'passing' trade. This is not necessarily a weakness in a higher order sub-regional centre like Worthing, but convenience stores are recognised as strong anchor units and footfall drivers which can substantially contribute to the health of a town centre.

- 5.14 The main edge-of-centre foodstores include Waitrose (2,233 sq.m net) and Lidl (720 sq.m net). Waitrose is located on High Street at the roundabout where North Street meets Lyndhurst Road. The store has 14 checkouts (6 self-service), and offers a Boots Pharmacy, café, cheesemonger, baker, deli, fishmonger and meat counter. Parking is free for up to 2 hours and there are 260 available car parking spaces. The Lidl store is an older format store, small in scale with just 3 aisles and adjoining small customer car park with space for around 40 vehicles.
- 5.15 There are two main out-of-centre foodstores in Worthing; Sainsbury's at Lyons Farm and Morrison's to the north of Worthing town centre, both of which appeared to be performing well during site visits. The Morrisons store on Newland Street is most closely related to the town centre being located on the A24 out of the town centre. The store includes 26 checkouts (8 self-service), an M Café, butcher, fishmonger, deli, bakery, flower shop, newsagent and pizza counter. In addition to this, two aisles are dedicated to home-ware and electrics; one and a half aisles for kids clothing; and half an aisle comprising entertainment, stationary and magazines. The store is served by free parking which provides approximately 310 car parking spaces and is available for up to two hours.
- 5.16 The main anchor food stores are supplemented by a comparison shopping offer comprising 42% of total town centre floorspace. The comparison offer holds a position above the UK national average in terms of the proportion of units and floorspace dedicated to this type of retail offer today. This is to be expected in a higher order sub-regional centre.
- 5.17 The Experian Goad Category Report (2016) provides a finer grained break down of the sub-categories of comparison goods which highlights the below average number of units in the children's wear and general clothing categories, and a marginally above average number of ladies-wear, menswear and footwear operators.
- 5.18 **Table 5.3** sets out the highest order comparison goods operators in Worthing town centre at the current time. Beales department store does have some concessions, but these are small in range compared to full-line shops. Next is due to close shortly and has been excluded from the list in Table 5.3, whilst Laura Ashley will close as part of the Montague Centre development. The Mothercare store on South Street will also cease trading in October 2017.
- 5.19 Whilst many of those listed in Table 5.3 are strong attractors with a loyal customer base the quality, range and breadth is limited compared to the competing centres of Chichester, Brighton and Horsham. In these centres, the following operators can be found:
- East
 - Jigsaw
 - Jack Wills
 - Molton Brown
 - Karen Millen
 - JoJo Maman Bebe
 - Space NK
 - Gap
 - Gerry Weber
 - Cos
 - Warehouse
 - Fat Face
 - Hobbs
 - French Connection
 - Russell & Bromley
 - Lush
 - Cath Kidston
 - Mint Velvet
 - Molton Brown
 - Phase Eight
 - Joules
 - Miss Selfridge
 - White Stuff
 - Waterstones

Table 5.3 Worthing Major Retailers

Major Retailers	Location
Wilko	Guildbourne Centre
Debenhams	South Street
Beales	South Street
Jones Bootmaker	South Place
TK Maxx	Montague Centre
HMV	Montague Centre
Laura Ashley *	Montague Centre

Topshop	Montague Street
H&M	Montague Street
Marks and Spencer	Montague Street
Monsoon/Accessorize	Montague Street
Thorntons	Montague Street
Sports Direct	Montague Street
New Look	Montague Street
River Island	Montague Street
Argos	Montague Street
Dorothy Perkins/ Burtons	Montague Street
Clarks	Montague Street
Holland and Barratt	Montague Street
The Body Shop	Montague Street
Waterstones	Montague Place

Source: Experian Goad survey & GVA site visits

*The Laura Ashley store will close as part of approved plans for the redevelopment of the Montague Centre.

- 5.20 In respect of the 'leisure services' category, Worthing appears to be performing well compared to national average expectations. There is, for example, an above average provision of bars/wine bars, cafes, cinemas/theatres/bingo halls, nightclubs and restaurants. However whilst proportionately leisure services are well represented, there are qualitative gaps in the leisure offer of Worthing — further discussion of this is provided in Section 8.

Character Areas

- 5.21 As part of the 'Supporting the Retail Sector in Worthing Town Centre' (2009) document, GVA previously identified retail 'character areas' in order to advise on the best way to preserve the viability and viability of the existing shopping areas in Worthing. Nine retail character areas were identified and in order to assist in our description of the retailer representation and offer and to ensure consistency, we have updated the information previously provided for each of these areas. The character areas are shown mapped at **Appendix 1**.

Character Area 1: Teville Gate

- 5.22 Teville Gate is located beyond the Primary Shopping Area and the town centre boundary of Worthing town centre, but we have included this character area as it forms a key entrance point or 'gateway' to the town centre. Located just south east of Worthing main railway station, this underused area creates the first impression for visitors to Worthing town centre. It was identified within the 2006 Worthing Town Centre and Seafront Masterplan as an opportunity site with the potential for re-development and to create an attractive entrance into and towards the town centre.
- 5.23 Currently, those navigating their way to the town centre are met by the Grand Victoria Hotel on the corner of Oxford Road, a multi-storey car park, surface car parking, Teville Gate House (vacant office building) and a number of other vacant warehouse buildings, retail units and the rear servicing yard for Morrisons. Ease of navigation to the town centre from the railway station is severely hindered by these buildings pepper potted across the area with no clear pedestrian link to the town centre and Central Shopping Area. Other uses in the area located on Teville Road include a café, print shop, kitchen/ furniture shop, local foodstore and Kwik Fit Tyres. Teville Gate does not present an attractive environment and the area generally feels rundown and unwelcoming.
- 5.24 Two previous planning permissions relate to the site, both securing comprehensive mixed use development including retail, leisure, cinema and residential uses. Teville Gate (excluding Teville Gate House) was bought by Mosaic Global Ltd in June 2015 with aspirations to develop the site for approximately 450 residential units, 'landmark buildings', supermarket, retail units and potentially cafes and restaurants. A planning application was predicted for the second half of 2016 however no planning application has yet been lodged.

- 5.25 At the time of GVA's on site survey, the footfall in this area was very light, generated mainly by those individuals coming from the train station or utilising the car parking facilities. It was noticed that a number of people were utilising the undercroft passageway through the vacant Teville Gate office building, however overall, as mentioned above, there is no cohesive route through this area to the town centre.

Character Area 2: Chapel Road North

- 5.26 The area which comprises Chapel Road North (outside of the Primary Shopping Area) stretches from the roundabout at Teville Road down towards the Chapel Road/ North Street roundabout. Chapel Road, as previously stated in this report, forms the key access route towards the town centre. The area feels dominated by the presence of traffic on the busy A24 and the road does not lend itself to creating a pedestrian friendly environment, limiting the ability to easily cross from one side of the street to the other.
- 5.27 The retail offer is of a low quality and located entirely on the eastern side of the road. Retailers who are present include a hairdressers, toy and game shop, two local convenience stores, insurance brokers, army surplus store and a solicitor's office. A large vacant unit formerly occupied by Bunces (a hardware retailer, who have relocated to a store on Portland Road and a trade counter site on a local industrial estate) sits prominently on the A24. The vacant Bunces site has since been subject to an application for residential development which has been approved.
- 5.28 The south portion of this defined area has retail occupiers in larger retail units such as Dreams Beds and Bedding, Worthing Bedding Centre, discount tyres and a health club, while the smaller retail units accommodate a hairdresser, local food shop and a martial arts academy. A large vacant unit fronts onto Stoke Abbot Road which was previously occupied by Blockbuster, then Morrisons 'M Local' for about a year then 'My Local' before closing shortly afterwards.
- 5.29 A subway creates a pedestrian access route under the Chapel Road/ North Street roundabout. Although decorated with public art and well lit, the subway is not the most pleasant environment in which to access the southern part of Chapel Road and thereafter the town centre. GVA noted that the footfall was light in this area, and from observation it seems individuals utilise both the pedestrian subway and pavements as a through route to access the town centre or railway station. Similarly to Character Area 1, this area has a low concentration of people walking around this area.

Character Area 3: High Street

- 5.30 High Street is positioned outside the Central Shopping Area and is anchored by the Waitrose foodstore, which significantly boosts the overall quality of the retail offer in this area. The remaining retail outlets comprise a café, glass and glazing company, Ladbrokes betting shop, auctioneers/valuers, hairdresser, tattooist, Polish restaurant, undertakers, two pubs/ bars and two bathroom/ furniture shops. One vacant unit is located at number 30 High Street. There is also a Jobcentre Plus fronting onto Charlecote Road.
- 5.31 Apart from the presence of the Waitrose located on the corner of Lyndhurst Road, the retail offer is secondary in nature, of a low density and characteristic of retail found on the cusp of a town centre. The quality of the built environment here is of a higher quality than that in areas 1 and 2, albeit this stretch of the road continues to feel transient in nature and from our observations has a low footfall.

Character Area 4: Chapel Road Cultural & Civic Quarter

- 5.32 Character Area 4 is located within the town centre boundary, but outside of the Primary Shopping Area. This character area is defined by the concentration of civic and cultural uses present, including the Council Offices, library, The Assembly Hall Theatre, Royal Mail sorting office, Worthing Museum and Art Gallery, a church and an English Language School. The former St Pauls Church has been converted into a multi-purpose arts venue and community facility, with a popular café.
- 5.33 The retail is predominantly located on the eastern side of Chapel Road, with the exception of the Wheatsheaf Pub located on Richmond Road. Retail units include a café, three gift shops, baker, two estate agents, nail bar, hairdresser, antiques dealer, sandwich bar and a vacant restaurant unit. The area has an enhanced sense of place due to the historic fabric of the buildings which create a pleasant entrance to the Central Shopping Area, located to the south. The footfall in this location was higher than that of the footfall in the previously discussed areas however it is still rather low.

Character Area 5: Chapel Road South & Guildbourne Centre

- 5.34 Chapel Road continues southwards from Character Area 4, detailed above, and forms part of the Primary Shopping Area. 'Area Change 4', Union Place South is located within this character area. The concentration of retail uses which are positioned either side of Chapel Road are characteristic of those found in secondary shopping frontages and

include banks, hair dressers, hardware stores, charity shops and estate agents. A small number of multiple retailers are located here including Tesco, Maplin, Wimpy and Greggs. A Slug and Lettuce restaurant opened in October 2016 on Chapel Road and replaces Bar Release who were the former occupiers.

- 5.35 There are a handful of vacant units, some of which are being refurbished and actively marketed to let, which reflects a different economic environment than the one detailed in the 2009 retail study which reported 'increasing numbers' of vacant units. Store Twenty One has recently vacated a sizeable unit on Chapel Road opposite the entrance to the Guildbourne Centre, and the unit has been re-occupied by Peacocks Clothing.
- 5.36 The architectural styles of the buildings vary along Chapel Road which adds interest to the streetscene, while The Connaught Theatre on the corner of Union Place, adds vibrancy to the area. Traffic can travel approximately half way down Chapel Road before being diverted onto Chatsworth Road, leaving the remaining southern portion of Chapel Road a pedestrian zone (no vehicles access only). In terms of footfall, this portion of the town centre has reasonable levels of footfall and an active bustling streetscene.
- 5.37 The Guildbourne Shopping Centre is located between Ann Street and Chatsworth Road and accessed via the civic realm at South Place, or via the multi-storey car park on Chatsworth Road. The Guildbourne is performing poorly with the entire first floor standing vacant and boarded up to restrict access and the ground floor hosting an array of poor quality retail shops including a heavy representation from charity shops, a Wilko, a betting shop, butcher, jeweller, health food store, lighting shop and travel goods shop.
- 5.38 The remaining six units on the ground floor are vacant, one of which is particularly large in size and is positioned on the corner of Ann Street, adjacent to the multi -storey car park (estimated 650 car parking spaces) which serves the shopping centre. From our on-site survey, it was clear that the only real draw to the centre is the presence of the Wilko store, the café and the multi-storey car park, resulting in pedestrians utilising the centre as a passageway between the car park and the rest of the Central Shopping Area outside The Guildbourne.
- 5.39 A prior approval (ref no. AWDM/1434/16) was granted on 15 November 2016 for a change of use from Use Class A1 (retail) to Use Class D2 (health club and gym) in unit 17 of the shopping centre. Impulse Leisure is set to occupy this unit and the introduction of this leisure use has potential to boost activity in this area of the town centre.

Figure 5.1 Guildbourne Centre, Worthing town centre



- 5.40 The Council has advised that a gym operator is interested in occupying the vacant first floor level. Should this use be implemented, there lies a good opportunity in the interim (on the assumption that the site will eventually be developed) to increase footfall, dwell time and spend in this area of the town centre. To improve the health of the entire Guildbourne Centre in the long term however a more comprehensive focus is needed for the whole shopping centre and its surrounding area to understand the kind of identity that needs to be established.
- 5.41 Ann Street sits south of the Guildbourne Centre and offers a very limited number of retail shops including a hairdresser, tattooist, shoe repair and print shop. Ann Street suffers from the presence of the large dead frontage that is the side of the Guildbourne Shopping Centre which creates an atmosphere of a 'backstreet' area as opposed to a functioning

retail street. Ann Street enables access to Warwick Street which has a strong niche retail offer and it was apparent that pedestrians were using Ann Street as an access route south through to Warwick Street or westwards towards South Place from High Street. This level of footfall is, however, low.

Character Area 6: Warwick Street/ Brighton Road

- 5.42 Warwick Street is a pedestrianised shopping street, located within the town centre boundary and designated under Primary Zone B of the Central Shopping Area. Warwick Street has a very distinct identity characterised by an array of independent and specialist shops including menswear/ womenswear, cook shop, jewellery, delicatessen, outdoor wear and toys and an emerging 'café culture'. Only a couple of large multiple retailers are present and these include Jessops and HSBC, located at the western end of the parade. Three vacant units were noticed at the time of the on-site survey.
- 5.43 The street functions predominantly as an eating and drinking destination in Worthing and the presence of outdoor seating areas for the restaurants, bars and cafés creates active frontages and a bustling streetscene. The Council has advised us that the restaurant and cafe seating has been preventing free flowing pedestrian accessibility and movement along the pedestrianised street. In response to this issue and to create a clutter free public realm, the Council has taken on the licensing responsibility to appropriately manage the outdoor restaurant seating and tables. Small changes such as this, can significantly improve the shopping experience for visitors in addition to navigation and permeability throughout the town centre.
- 5.44 The environment is pleasant, particularly due to the 'car free' restriction and the street benefits from street planting and lighting. The shop units are generally small and narrow which further improves the character and feel of the shopping parade. Stanford Square and Bedford Row both cut through the southern retail frontages of Warwick Street to provide access southwards towards Marine Parade and beyond, the seafront. Stanford Square, which leads through to a Pizza Express, is particularly narrow and may not be immediately apparent to those visiting Warwick Street.
- 5.45 Brighton Road extends eastwards from Warwick Street and although it exhibits a retail offer of a secondary nature, mainly serving local every day needs, a small number of specialist shops are located here including two bridal boutiques, frame shop, lighting, kitchens and gifts. The dominance of takeaways and low end restaurants generally diminishes the quality of the area and the presence of traffic reduces connectivity for pedestrians between either sides of the road. Only one vacant unit was noted on our on-site survey.

Character Area 7: South Street

- 5.46 The South Street character area falls within Primary Zone A of the Central Shopping Area and together with the Montague Character Area (see Character Area 8) comprises the main high order shopping offer in Worthing. This character area is significant in that it forms the link between the Primary Shopping Area to the north (Chapel Road South/Guildbourne) and the seafront. The Royal Arcade which is located within this character area is classified as Primary Zone B. South Street extends southwards from Chapel Road South (Character Area 5) and links all the way to Marine Parade and the seafront.
- 5.47 South Street is a partly pedestrianised area anchored by Debenhams and Beales department stores. Beales is set across three retail floors and Debenhams four floors; however the Debenhams has a more conventional store layout. Other large multiple retailers include, Blue Inc Menswear, Robert Dyas, Mothercare and Jones Bootmaker. The southern portion of the street hosts a cluster of eating and drinking establishments such as Vita, Caffè Nero, Blue Ocean Fish and Chips Macari's Restaurant and The Cowshed Restaurant. Iceland convenience store occupies a prominent site on the corner of South Street and Marine Parade, but is a dated and run-down unit.
- 5.48 The Royal Arcade is a traditional style glass covered shopping arcade populated by mainly specialist retail shops which adds to the diversity of the retail offer in Worthing. The retail offer here includes an arts and crafts shop, beauty parlour, computer shop, baby clothing shop, health foods shop, tanning studio, jeweller and acupuncture clinic. It was noted that a couple of previously vacant units are now occupied by Wheelers clock makers and BurgerMee restaurant. The arcade dates back to the early 1900s and therefore provides architectural interest to the character area.
- 5.49 Bath Place runs adjacent to the arcade and is predominantly lined by a number of good quality independent cafes, restaurants, hair and beauty salons and also a gym. The rear of H&M backs onto Bath Place creating a 'dead' frontage which does not contribute positively to the street scene. Ideally an additional entrance would be most beneficial on this eastern façade to create an active street frontage (as was the case when Woolworths formerly occupied this unit), however if this were not possible then better utilisation of the window display to create visual stimulation would address this unattractive frontage and help to enliven the area.

- 5.50 The Montague Centre (4,650 sq.m) is a modern build partially covered shopping centre in Worthing which links Montague Street to South Street. The main anchor retailers here are TK Maxx and HMV. Other multiple retailers present include Laura Ashley, Toy Barnhaus, Clintons and Game. There appeared to be three vacant units.
- 5.51 The Montague Centre is subject to a planning permission (ref no AWD/1640/15) for a newly constructed free standing glazed kiosk and a change of use of Units 1, 2 and 6 to 12 to create restaurant/café floorspace, including public realm improvements. Existing anchor stores TK Maxx, HMV and Game are to be retained, while potential future occupiers of the new A3 floorspace include Nando's, Carluccio's and Patisserie Valerie. This scheme will transform and anchor this part of the town centre as a new eating, drinking and shopping destination, increasing footfall and on-street activity. Construction on the scheme has not yet commenced. We consider these proposals will, once implemented, represent a positive development for the town centre, and will assist in the Montague Centre making a more active contribution to the overall town centre offer.
- 5.52 As noted in Section 3, Worthing Council has been working in partnership with West Sussex County Council to deliver town centre improvements to Montague Place. This initiative was launched in late September and future plans include the pedestrianisation of Montague Place and Portland Road, delivering much-needed links between Montague Place and the sea front as envisioned originally within the Worthing Town Centre and Seafront Masterplan (2006).

Figure 5.2: Worthing town centre public realm improvement plans, Montague Place



Source: Worthing Town Centre Initiative

- 5.53 The eastern portion of Montague Street begins in this character area and continues to run westwards from South Street. Similarly to the Montague Centre, the retail offer here is also characterised by large high street retail brands such as WH Smith, H&M, Topshop, Waterstones, Vision Express, H M Samuel, ShoeZone, Tresspass, Mountain Warehouse and The Carphone Warehouse. No vacancies were noted in this stretch of the shopping parade. Marine Parade sits adjacent to the seafront and parallel with Montague Street and hosts a dental surgery and leisure uses characteristic of 'seaside' towns, including two bars, a Middle Eastern restaurant, Connaught Leisure Amusements and a Harry Ramsden's Fish and Chip restaurant.

Character Area 8: Montague Street

- 5.54 Montague Street continues west from character area 7 (above) and generally follows a linear arrangement along the pedestrianised shopping area. Montague Street is designated as part of Primary Zone A of the Central Shopping Area (the entirety of which is pedestrianised in this section of the street) while Montague Place is Primary Zone B and Portland Road and Buckingham Road are recognised as secondary shopping areas.
- 5.55 Montague Street draws in large national retailers and benefits from a number of large retail units, the largest of which are currently occupied by anchor stores Marks and Spencer and Boots. Poundland, Argos and New Look also occupy retail units which are fairly sizeable. The large unit at 56 Montague Street, left vacant when British retailer BHS went into administration, has been occupied by Poundworld Extra. Of detriment to the health of this character area, Next is due to leave its existing premises on Montague Street in early 2017 and re-open in Rustington.

- 5.56 A number of the smaller vacant retail units in this area have been filled with retail tenants since the previous Experian Goad survey (February 2016) resulting in a low overall vacancy rate. Additional national multiple retailers include Bonmarche, JD Sports, Sports Direct, River Island, Specsavers, Holland and Barrett, Clarks, Dorothy Perkins and the Body Shop.
- 5.57 Beyond the junction at Buckingham Road the retail offer becomes largely populated with independent specialised retailers and we observed that the size of the retail units began to diminish with increasing distance from the core of the town centre. This area of the centre (commencing from the junction of Montague Street / Crescent Road) is known as the West End. Tenants in this part of the centre include Churchill's Newsagents, Furniture & Mirror Interior Décor, Caffè Pitti and Card Factory. Vacancies are low on this stretch of the street which differs from the account of vacant units produced in the GVA 2009 retail study and the Montague Street 2012 health check which reported persistent vacancies towards this end of the shopping street. Given the nature of smaller independent businesses there may be a higher 'churn' of operator.
- 5.58 An on street market was operating at the time of our on-site survey, offering a range of fresh food, clothing, accessories and homeware goods. This market takes place every Wednesday from 9am until 5pm and increases the footfall in this portion of the town centre dramatically, creating vibrancy in the area. In terms of footfall across the wider Montague Street shopping area, we observed that it was very busy and the most heavily trafficked part of Worthing town centre, consistent with the Montague Health Check Report 2012.
- 5.59 Portland Road runs north to south and includes a number of independent retailers including The Fat Greek Restaurant, Small Batch Coffee, County Kitchens Furniture, Kusbus Market Deli, Cucinetta Café, The Libertine Bar and a YMCA charity shop. Apart from County Fitted Furniture the retailers here are all different than those present in 2009 at the time of the study undertaken by GVA. Small Batch has recently occupied the reasonably large vacant unit at number 14-16 Portland Road.
- 5.60 Montague Place was identified as a key route through to the seafront in the 2009 GVA Study. The study also reported a relatively 'inactive' retail frontage that did not draw visitors from the seafront up Montague Place into the main shopping area. From our recent observations we have found the area to be showing a little more life. Current retail tenants which line the street include Costa, Continental Café, Subway, RBS, Luna Pizza (restaurant), Altered Image (tailors), Beijing (restaurant), My Place (gift shop), Bravo (café) and a vacant bank/ financial unit. A street market added further footfall at the time of our visit. As shown in Figure 5.2 on the previous page and discussed previously in this report (see paragraph 3.24), the Council, in partnership with West Sussex County Council, is investing in enhancing the public realm at Montague Place, with Phase 1 of the works already complete, having successfully introduced a series of improvements including the installation of new paving, seating and the installation of a new performance space.
- 5.61 The eastern side of Montague Place does, however, suffer from a 'dead frontage' created by the side elevation of the retail shops (H&M and Mountain Warehouse) fronting onto Montague Street and Bar 42 on Marine Parade.

Character Area 9: Rowlands Road

- 5.62 Rowlands Road is a continuation of Montague Street (Character Area 8 above), but forms part of the Secondary Shopping Frontage. This Character Area includes the portion of Montague Street which stretches westwards from the junction at Crescent Road and Rowlands Road which continues westwards. The shopping offer in this location functions to meet local resident's needs and is anchored by a Co-op convenience store located on the corner of Rowlands Road and Erstwell Road.
- 5.63 The western end of Montague Street hosts a good range of independent shops including hairdressers, charity shops, baker, cafés, an Indian and Mexican restaurant, furniture shop, dry cleaners and Natural Therapy Clinic. Similarly, Rowlands Road exhibits a range of retail shops to meet everyday shopping needs and includes a number of specialist shops such as arts and crafts, kitchen/ furniture and an art gallery. The footfall is lighter here than in the core of the retail area although vacancy levels remain low.

Other Main Town Centre Uses

- 5.64 Worthing has a number of other main town centre uses. Many of these are focused around Marine Parade at the seafront or are within a reasonable walking distance of the town centre. Leisure uses located at Marine Parade include the Dome Cinema, AMF Bowling complex, the Worthing Lido Family Entertainment Centre, and the Pavilion Theatre. Worthing also benefits from the presence of the Connaught Theatre, the Ritz Digital Cinema (part of the Connaught Theatre), the Worthing Museum and Art Gallery and a number of gyms located within a reasonable

distance of Worthing town centre boundary. These non-retail uses form an important part of the diversity of the town centre and are discussed in more detail in Section 8.

Seafront

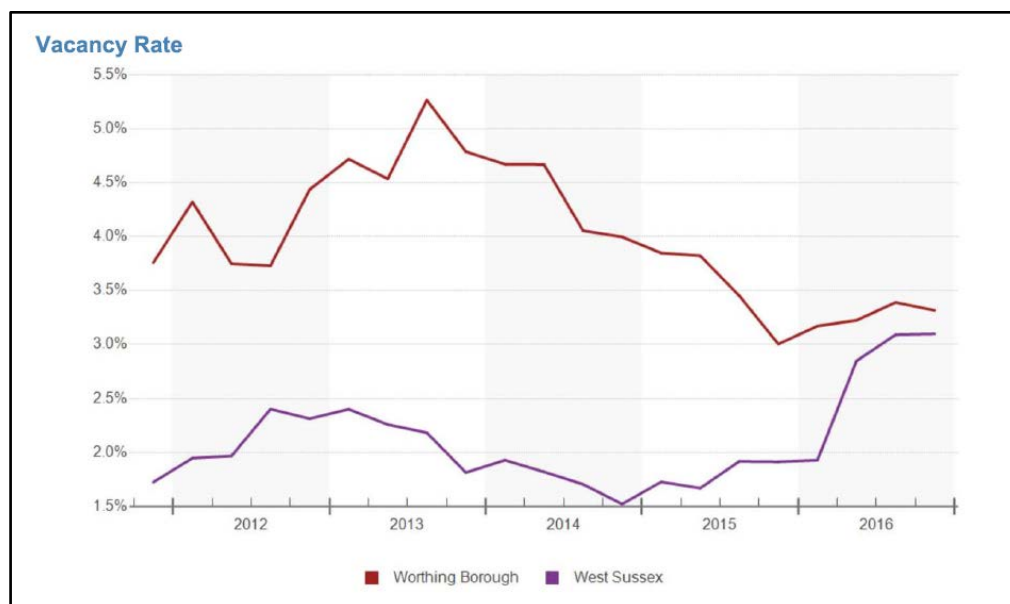
- 5.65 The seafront and promenade itself is a key feature for Worthing which stretches the length of the town centre boundary. In addition to the beach, the Dome Cinema, Worthing Lido (entertainment), Pavilion Theatre, AMF Bowling and a selection of cafes/restaurants of varying quality, provide the key attractions.
- 5.66 Respondents to the Household Telephone Survey were asked how often they visit the seafront in Worthing. Within the Zone 1-5 survey area, 13.8% visited at least once a week or more often, 43.3% visited less often, and 41% never visited. Within Core Zone 1, 31.1% visited at least once a week or more often, 35.9% visited less often, and 29.7% never visit the seafront. These response rates reflect a low usage of this key asset, and highlight a significant opportunity to enhance the destination as a key visitor attractor.
- 5.67 Those who do visit the seafront were then asked if, on that visit, they also visit the town centre shopping area. Around 50% of respondents said that they did, primarily for non-food shopping (67.5%), cafes/pubs/restaurants (44.3%), food shopping (16.2%) and leisure activities (5.8%). This highlights a reasonably good level of linked trips, but again, highlights the opportunity to capture the remaining 50% of visitors to the seafront to then also spend money in the town centre shopping area – whether on retail or food/beverage.
- 5.68 When asked what visitors thought could be improved on the seafront, the responses included better cafes/restaurants, a more attractive and cleaner environment, modernisation, and better accessibility/parking.

Vacancy Rate

- 5.69 The most recent Experian Goad Survey (February 2016) highlighted a 9.9% vacancy rate, which is just below the UK national average. This vacancy level is slightly higher than the results of the DTZ 2010 Retail Study Update which reported a vacancy rate of 7%). The vacancy rate currently appears to have dropped very slightly since the 2016 Experian Survey, recording an 8.7% vacancy rate. The Experian Goad and GVA counts both exclude the top floor of the Guildbourne shopping centre which is effectively closed.
- 5.70 From our on-site survey of Worthing town centre we have identified the Guildbourne Centre as a particular ‘problem area’ in terms of vacancy levels. The shopping centre hosts 6 vacant units on the ground floor, one of which has a large floorplate, and the vacant upper floor has remained empty since the previous 2009 Retail Study. The 2009 Retail Study reports on ‘the decline of the Guildbourne Centre’ and highlights its ‘growing vacancy rate’. This description still appears to apply to the shopping centre which is struggling to adapt to changes in the retail environment, and operates under the aspiration for redevelopment which deters any short/medium term improvement/investment (Area of Change No.3).
- 5.71 Elsewhere in the town centre, vacant units include the former supermarket unit on Stoke Abbot Road, a small number of vacant units scattered across the Chapel Road North Character Area, vacant units on the Marine Parade shopping frontage located by Bedford Row and a handful of vacancies on Chapel Road. None of the shopping areas appeared, however, to be suffering significantly from large concentrations of vacant units, and is instead likely to be a temporary position with many soon to be reoccupied.
- 5.72 At the time of our survey, refurbishment of units was taking place on Chapel Road suggesting that these units are soon to be occupied; and on the stretch of Montague Street west of Crescent Road, many of the previously vacant units have now acquired new retail tenants.
- 5.73 During the on-site survey, GVA updated the Experian Goad Plan, and identified those retail units which have either had a change in retail tenant, recently become occupied or have recently become vacant. A large proportion of units have become occupied by good quality and mainly independent eating/drinking establishments such as Small Batch Coffee, Pizza Face Boho Gelato, Nonna’s Kitchen and Giuseppe’s Southern Italian Restaurant. This is a positive sign for the health of Worthing and will actively boost the existing eating and drinking offer the town centre already has.
- 5.74 Other retail uses which have been introduced to Worthing include specialist comparison shops (furniture, lighting, hardware), retail service and business and financial shops, two charity shops, a gym and dental clinic. There have been no notable clothing/footwear retailers.

- 5.75 The large vacant unit on Montague Street, previously home to BHS is now occupied by a Poundworld Extra. This could have been an opportunity to attract a higher quality comparison retailer, albeit this is always dependent on the unit size and layout and also the general requirement for a 'critical mass' of similar operators within a close proximity/frontage. When considering a future town centre strategy, this is a key aspect that the Council should keep under consideration.
- 5.76 **Figure 5.3** below illustrates the change in vacancy rate for Worthing Borough over time, compared to the average for West Sussex, based on historic data for properties within the CoStar Commercial Property Database. This data is different from the vacancy levels recorded with Experian GOAD, and therefore the two data sets are not directly comparable, however the data provide a good analysis of the performance of the borough relative to West Sussex over a 5 year time period.
- 5.77 The graph demonstrates that vacancy rates in the whole of Worthing Borough have been higher than in the wider county area. The vacancy rates in Worthing have fluctuated between 2012 and 2016, with a peak in vacancy rates in the second half of 2013 after which the overall trend shows a consistent reduction in the percentage vacancy rates over time. Since 2015, vacancy rates in West Sussex have increased, whilst those in Worthing have remained more stable and are more reflective of the regional average. Worthing is performing better in this specific indicator that at any time in the last 5 years.

Figure 5.3: Vacancy Rates in Worthing and West Sussex, 2012-16



Source: CoStar Commercial Property, 2016

Retailer Requirements

- 5.78 A review of published retailer requirements is a useful indicator of the health of a town centre and the demand from operators to be represented in that centre. Published data from CoStar, as set out in **Figure 5.4** below must, however, be treated with caution. Many national multiples treat their site finding as confidential given the competitive market and limits on available space in appropriate locations. The demand for Worthing town centre might well be stronger, but the data does not provide this confidential outlook.
- 5.79 It is evident from Figure 5.4 that Aldi do have a requirement for Worthing, along with some A1 and A3 operators, including Frankie & Benny's – normally found at out-of-centre retail/leisure parks. There are no quality clothing/footwear retailers with a publicly registered interest in taking space in Worthing at the current time.

Figure 5.4: Published retailer requirements

Location	From ft ²	To ft ²	Class	Agent	Contact	Retailer
Worthing	2,500	5,000	A1	Cradick Retail	Jim Grant	C & H Fabrics
Worthing	5,000	9,000	All	Marston's plc	John McElholm	Marston's plc
Worthing	4,500	15,500	All	Aldi Foodstore Ltd	Roland Stanley	Aldi Foodstore Ltd
Worthing	3,700	8,000	A3	Wareing & Partners Ltd	Nathan Wareing	Chiquito
Worthing	1,000	2,000	A1	Macarthur Wilson	Richard Biggs	Saltrock
Worthing	2,500	4,000	All	Johnstone Property Consultants	Mark Johnstone	Pavers Ltd
Worthing	18,300	18,500	A1	Cradick Retail	Jim Grant	Aldi Foodstore Ltd.
Worthing	700	2,000	A1	Brasier Freeth	Anthony Appleby	Warren James Jewellers
Worthing	850	2,000	All	Mind	Emily Morris	Mind
Worthing	2,000	3,000	A1	Brasier Freeth	Russell Jerrard	Linens Direct UK Ltd
Worthing	25,000	55,000	All	Jp Retail Ltd	James Peasnell	Flipout
Worthing	3,700	8,000	A3	Wareing & Partners Ltd	Nathan Wareing	Frankie & Benny's
Worthing	2,000	4,000	A1	Barker Storey Matthews	Julian Welch	Confidential c/o Barker Storey Matthews
Worthing	1,292	1,615	A1	Jp Retail Ltd	James Peasnell	Solutions Inc
Worthing	200	1,500	All	GCW	Simon Morris	The Fragrance Shop
Worthing	3,000	6,000	A1	Cradick Retail	Hanna Wright	Sussex Bed Centre
Worthing	2,000	3,000	All	Five Guys	Daniel Smith	Five Guys

Source: CoStar Commercial Property, 2016

Commercial Rents

Figure 5.5: Average Prime Zone A Rents in Worthing and West Sussex, 2012-16



Source: CoStar Commercial Property, 2016

- 5.80 The Co-Star Commercial Property Database also provides details on average prime/'zone A' rents in Worthing town centre, as shown by Figure 5.5 above, which also shows the average for centres across West Sussex. Figure 5.5 shows that towards the end of 2016 average rents in Worthing Borough were approximately £17 per sq.ft. Whilst the average rent in Worthing has fluctuated slightly in recent years (peaking at just over £20 per sq.ft in 2012-13), it has consistently remained slightly lower than the average for West Sussex, which over the last five years has peaked at £22 per sq.ft in early 2013.

Accessibility

- 5.81 Worthing town centre has good accessibility to the main road network, being in close proximity to the A24 (leading on towards the M25) and the A27 allowing road access east and westwards. The railway station is located just off Railway Approach, approximately 15 minutes' walk from the primary shopping area, and offering regular services to Clapham Junction and London Bridge (approximately every 30 minutes). The Worthing Bus and Coach Station is located at Marine Parade in close proximity to the Dome Cinema, and allows easy accessibility to the town centre via public transport (Area of Change No.2).

- 5.82 Worthing has a number of car parks which offer long stay parking for residents and visitors to the town centre. A large 24 hour multi-storey car park is located by Worthing railway station at Teville Gate offering around 350 pay and display parking spaces from Monday to Friday (£2.50) and Saturday and Sunday (£1.50). There is also an area currently dedicated to surface car parking adjacent to the multi-storey car park.
- 5.83 Worthing town centre is also well served by long stay multi-storey car parks. These include the multi-storeys at Buckingham Road, Grafton and High Street. These car parks are open 24 hours a day Monday to Sunday (including bank holidays). Parking rates for these car parks range from £1 for 1 hour up to £10 for 24 hours. There is no charge for parking during the night between 10pm and 6am.
- 5.84 High Street car park is the largest town centre car park and it is located adjacent to the Guildbourne Shopping Centre with a capacity of around 650 spaces. Buckingham Road car park sits just off the Central Shopping Area and has the capacity for around 290 cars. The Grafton car park (see Figure 5.6) has 450 spaces and as previously mentioned has been identified in the Worthing Core Strategy as a key development opportunity site to link the Central Shopping Area with the seafront (Area of Change No.3).
- 5.85 Free parking for up to 2 hours is also provided for customers of the edge-of-centre Waitrose store (260 spaces) and out-of-centre Morrison's store (310 spaces), while the edge-of-centre Lidl car park (50 spaces) provides a maximum stay of 1 hour free parking.

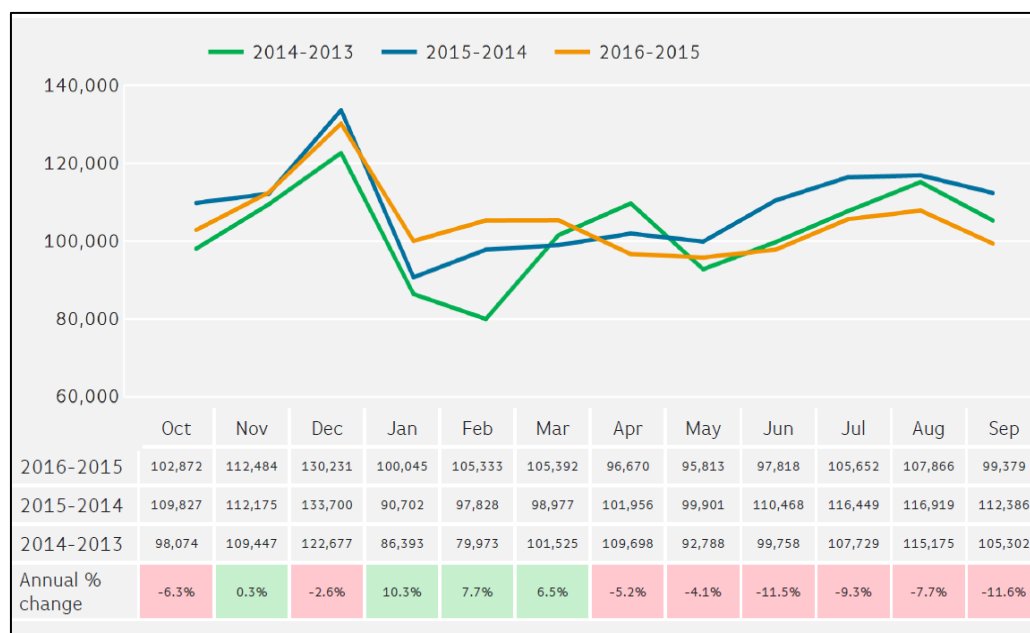
Figure 5.6: Grafton car park, key development site (Area of Change No.3)



Pedestrian Footfall

- 5.86 The footfall graph below (**Figure 5.7**), which has been generated by the Worthing Town Centre Initiative, demonstrates footfall count based on weekly averages in Worthing over a 12 month period from October 2015 up until September 2016. The graph demonstrates that footfall in Worthing fluctuates over the 12 month period, following similar patterns throughout the year, i.e. peaking during the Christmas shopping period and falling in the January/February months. During January/February/March 2016 footfall appears to have increased from previous years, but since April 2016 footfall in Worthing town centre has fallen below previous levels.

Figure 5.7: Monthly Footfall, Worthing (October 2016)



Source: footfall data supplied by Worthing Town Centre Initiative

Customer Views and Behaviour

5.87 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their likes and dislikes, and how they think Worthing town centre could be improved in the future. The key findings are summarised below:

- When asked what they liked about Worthing town centre, the top responses included 'close to home' (18.3%), 'good range of non-food shops (14.2%), the 'attractive environment' (13.2%) and 'compact/ easy to get around' (9.8%);
- In terms of dislikes, the cost of parking (15.8%) and 'not enough or choice of shops' (12.3%) came out top. Lack of parking (9.9%), vandals (6.5%) and vacant shops/ shops closing down (6.1%) were also mentioned;
- When asked what they would like to see improved in Worthing town centre, the three most cited topics included 1) choice, quality and size of shops; 2) cost and availability of car parking and 3) improved leisure facilities. A better choice of shops, better quality shops and more 'large shops/department stores' was cited by 42.2% of respondents. In terms of parking, 12.4% wanted to see free or cheaper parking and 6.3% wanted more/better parking; whilst 4.5% of individuals across the survey zones wanted more leisure, sports or cultural facilities.

5.88 More in-depth questions were asked to ascertain shopping behaviour in Worthing and we summarise the key findings below:

- The main purpose for visiting Worthing town centre was (as stated previously) for non-food shopping (55%), visiting café/ pub/ restaurant (8.1%), food shopping (6.5%) and visiting family/friends (5.5%). In terms of leisure activity only 4.8% stated this as their main reason for visiting the centre.
- To understand more about linked trips and how participants use Worthing town centre, individuals were asked which other activities/ services they utilised. A number of responses were identified including 'visit the seafront' (37.4%), 'non-food shopping' (29.6%) and 'visit cafés/pubs/restaurants' (24.3%);
- In terms of transport 67.5% travelled by car, followed by bus (9.3%) and car (as passenger) (8.5%); 7% stated that they walked to the centre while only 1.5% cycle and 0.9% travel by train. Those who travelled by car cited on-street parking in Worthing and the Union Place car park as their preferred parking places of choice. 19.6% of respondents stated that they didn't know or 'it varies'.
- When asked how often they visited Worthing town centre, the most popular response from participants in zone 1 was 'once a week' (26%) followed by 'once every 2 weeks' (18.2%) and 'once a month' (18.2%). In zone 2, the most popular answer was 'less often' and 'once a month', while zones 3 to 5 was 'less often' or 'never'.

- For those participants who visited Worthing town centre, they were asked how long they spent in Worthing town centre on any one trip. The top three responses across the 5 survey zones were: 2 hours to 2 hours 29 minutes (31.2%), 1 hour to 1 hour 29 minutes (20.6%) and lastly 1 hour 30 minutes to 1 hour 59 minutes (18.9%).

Summary

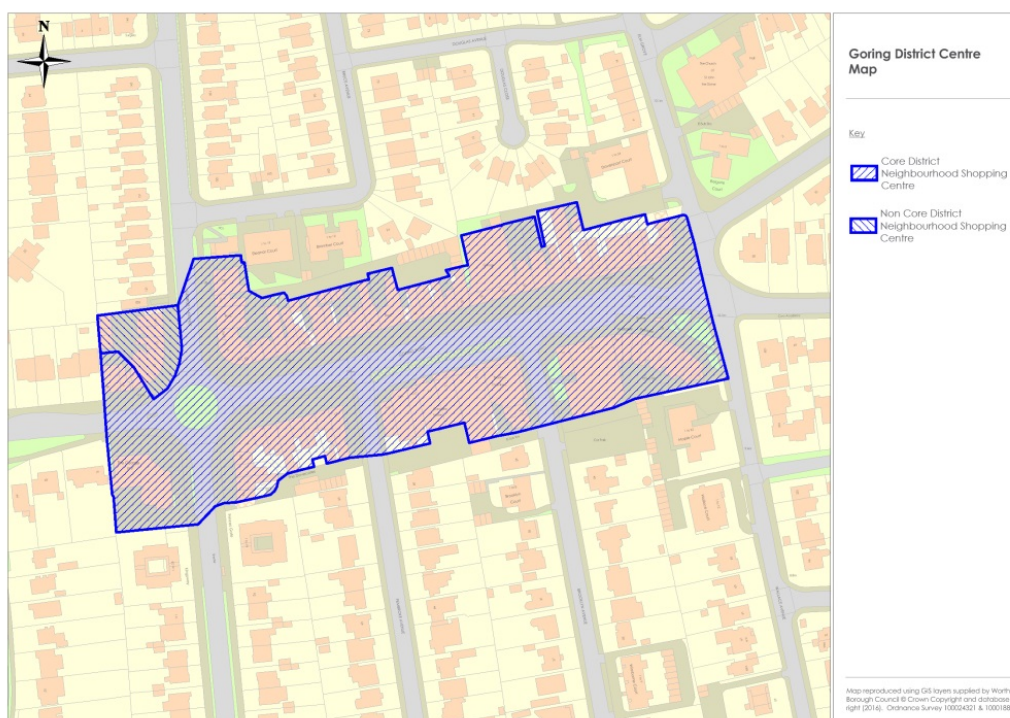
- The convenience goods offer in Worthing town centre – in terms of number of units and floorspace – is below national average (even when the edge-of-centre Waitrose is included in the statistics). There are four small scale top-up foodstores in the Primary Shopping Area which primarily cater for ‘passing trade’, and whilst Lidl and Waitrose comprise two good performing edge-of-centre foodstores with store dedicated car parks, we consider there is ‘room’ for a further town/edge-of-centre foodstore. If a proposal were to come forward, the Council should ensure strong connectivity with the shopping area so as to benefit from linked trips and footfall with the town centre.
- Overall, and as you would expect from a sub-regional centre, the number of comparison units is above the national average. A closer qualitative analysis identifies that the proportion of clothing/footwear operators is acknowledged to be low, and below national average in some categories. The quality, choice and range of clothing/footwear operators is weak, and rather than attracting new operators, Worthing has recently lost Bhs and will soon lose Next. The three main competing town centres of Brighton, Horsham and Chichester are superior, offering a stronger choice and substantially higher quality of operator, located in attractive environments.
- The leisure sector (number of units) is above national average in most categories within the Experian Goad ‘statistics’, albeit the quality and scale largely falls short of competing destinations. Market share is reasonably strong, and there is substantial opportunity to enhance this type of visit to Worthing still further. The cinemas – whilst full of character – are dated and small, and the tenpin bowling venue (AMF) is located in a sub-standard unit. The café and restaurant sector has been identified as improving in quality, choice and range in recent years, and this should be built upon further.
- The seafront is a key asset, and not yet being fully utilised or frequently used by the wider catchment or even Core Zone 1 residents. It will be crucial to focus on optimum layout/quality in respect of planned public realm proposals for Montague Place/Portland Road to build upon linked trips between the town centre and the seafront. The seafront is identified in this assessment as a ‘missed opportunity’ to the overall health of Worthing town centre.
- A key strength in Worthing is the strongly defined physical ‘character areas’ which should form the focus of a town centre strategy moving forwards, alongside the Areas of Change. There is, for example, a core shopping area, key gateways to the town centre, a café culture/niche retail area, the seafront, and an area meeting more localised needs alongside small scale niche/independent businesses. This is a strong physical base to build upon, which should also focus on those attractive buildings of architectural interest and character.
- Vacancy rates are below national average, but above West Sussex regional averages. Likewise, commercial rents fall below regional averages – albeit have experienced a small increase during 2016. Footfall has generally followed past trends, but since April 2016 has fallen below levels experienced in the preceding two years. These indicators reinforce the underperforming role of Worthing town centre within the region.
- Worthing is performing adequately, but substantial opportunity has been identified to transform Worthing to take a step change upwards in terms of the centres attraction and competitiveness. The town centre has a strong physical and operational base to build upon, with some signs of small improvement in recent years. There is much potential for an exciting period of change ahead, taking advantage of key development opportunities, the seafront and an improving economic catchment profile.

6 District and Local Centres

Goring District Centre

- 6.1 Goring district centre is located approximately 3km west of Worthing town centre. The A259 (Goring Road) runs directly through the centre, with regular bus services connecting the area to both Worthing and Goring-by-Sea. The main frontage is along Goring Road, with some units extending onto George V Avenue and Elms Grove. The predominant use in the wider surrounding area is residential.

Figure 6.1: Goring District Centre policy boundary



Source: Worthing Borough Council

District Centre Composition

- 6.2 Based on the latest survey undertaken by Experian Goad (September 2014), the town centre currently comprises 10,034 sq.m gross retail and service floorspace across 74 units. Tables 6.1 and 6.2 below summarise the composition of uses across the centre, and the data shows that Goring district centre has a higher than average proportion of 'convenience', 'retail services' and 'financial and business services' units and floorspace. These proportions reflect the centres position in the retail hierarchy as a Local Centre, providing primarily for everyday top up shopping facilities.

Table 6.1: Goring Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	21	28.38	31.82	-3.44
Convenience	9	12.16	8.66	+3.5
Retail Service	14	18.92	14.02	+4.9
Leisure Services	11	14.86	23.45	-8.59
Financial & Business Services	17	22.97	10.6	+12.37
Vacant	2	2.7	11.15	-9.24
Total	74	100	100	-

Source: Experian Goad Category Report (September 2014)

Table 6.2: Goring Composition of Uses (Floorspace sq.m gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Comparison	2,508	25	35.84	-10.84
Convenience	1,997	19.91	15.22	+4.69
Retail Service	1,663	16.57	6.73	+9.84
Leisure Services	1,329	13.24	24.53	-11.29
Financial & Business Services	2,035	20.28	7.97	+15
Vacant	502	5	9	-4
Total	10,034	100	100	-

Source: Experian Goad Category Report (September 2014)

- 6.3 The number of convenience units within Goring District Centre is above the UK average. In terms of food stores, the centre has a good number of operators including Tesco Express, Co-Op and Iceland. Whilst small-scale and top-up in nature (290 – 500 sq.m net), these units offer a good choice and range of food shopping options for the local catchment population and appeared busy and well used during site visits.

Figures 6.2 & 6.3: Goring District Centre



- 6.4 The proportion of retail services and financial/business services within the centre are both above their equivalent UK averages for these categories, however the proportion of leisure services in the centre is below the national average level for this category. In the 'retail services' category, Goring offers a Post Office, Boots Opticians and Vision Express Opticians, and a selection of hair and beauty businesses. Johnsons Dry Cleaners has closed in the period since September 2014, and has been occupied by Box Nails nail salon. Over the same period, WH Smith is now also represented within the Post Office.
- 6.5 In the 'financial and business services' category, Goring offers a range of banks (HSBC/ Natwest/ Nationwide/ Lloyds/ Santander) and a number of estate agents including Jacobs Steel, Cubitt & West, Glyn-Jones, Michael Jones and Mark Oliver, for example. There are one or two solicitors and legal/mortgage advisors also.
- 6.6 The 'leisure services' category is below national average, and anchored primarily by three popular cafes/coffee shops including 'The Lazy Brunch Kitchen' 'Costa' and 'Mad Hatters', and the Toby Carvery pub/restaurant. Costa Coffee moved into the centre recently, occupying the unit previously occupied by Hartley's off license. Fast food take-aways include Curry Zone, China Cottage, Worthing Fisheries and Peri Peri Chicken. Ladbrokes is the only betting office business in the district centre.

Figure 6.4 Goring District Centre



- 6.7 As noted above, representation from comparison goods operators in the centre is below the corresponding UK average for this type of retailer – both in the terms of the proportion of units in the centre which are occupied by comparison goods retailers, and also the proportion of floorspace (i.e. in sq.m) used for comparison goods sales relative to the total floorspace in the centre. This can be considered to be consistent with the centre's lower order role in the retail hierarchy; as set out earlier in this report comparison goods activity is increasingly concentrated in higher-order centres, and residents would more likely travel to Worthing town centre for such uses. The comparison business mix in Goring District Centre comprises six charity shops, and a range of niche businesses including Goring Pet Supplies, Goring Hardware, Cardus Stationer, Alexander Jewellery, Regency Carpets, James Perry Interiors, and Best Wishes Cards. 'The Man's Shop' provides the only clothing provision in the centre.
- 6.8 Goring Road has lost two comparison goods operators since the Experian Survey in September 2014. Bo-K Florist has closed down and been replaced by Hartley's Off Licence, and Store Twenty One ladies/menswear has closed and remains vacant.
- 6.9 Overall, Goring District Centre provides a strong range of food and service facilities, and a good range of comparison goods niche businesses. Combined, the retail and service offer highlights a good performing district centre which appeared particularly busy during site visits. The shopping centre also benefits from plentiful free on-street parking for up to two hours.
- 6.10 The Vacancy rate remains substantially below the national average, with only two vacant units in September 2012. Since this time, Store Twenty One has closed and remains vacant, as has Lighterlife Health Centre; but SHE Hairdressing and Spice I Am have occupied the two units recorded as being vacant in 2014. Goring Road currently has two vacant units.

Customer Views and Behaviour

- 6.11 The household telephone survey undertaken in September 2016 asked respondents what they liked and disliked about Goring specifically, but also their general use patterns. A summary of the key findings is outlined below:
- Respondents were asked which District Centre (West Durrington, Goring Road and Broadwater) they visited most often. Goring Road achieved the highest response, being visited by the greatest proportion of respondents (42%) compared to 25% citing West Durrington and 33% citing Broadwater.
 - In terms of frequency of visit, 25.3% use the district centre daily, and 22.8% said they used the centre between 1-2 times a week. There was also a strong proportion of respondents that said they used the centre once a month (14.7%). This is a strong frequency of visit, with 62.8% visiting the centre at least once of month or more often.
 - When asked how long they would usually spend in Goring district centre, 23.4% said their length of visit was between 16 and 30 minutes. The majority of respondents (65.2%) spent between 16 minutes and 1 hour 29

minutes. This is a good dwell time for a district centre and reflects the good range of uses combined with free parking for up to 2 hours.

- Respondents were asked what the main purpose of their trip to Goring Road is usually; 24.8% of respondents mainly using the district centre for food shopping, 24.3% cited non-food shopping and 16.9% stated cafes/pubs/restaurants. These figures highlight the strong diversity of offer in the district centre.
- In terms of the specific things that respondents liked the most about Goring, 53% noted the attractive environment/pleasant/friendly atmosphere. Other noticeable reasons were the centre's locality to home (25.1%), good places to eat (14.8%), good quality of shops (8.1%), and free/cheap parking (6.1%).
- There was very little that respondents disliked about Goring, albeit the desire for more parking was raised (11.2%).
- Currently 62.3% of people visiting Goring do so by car/van, whilst 31.8% walk. Without exception, all drivers park on-street. Only 2.2% travel by bus, and 1.7% cycle.

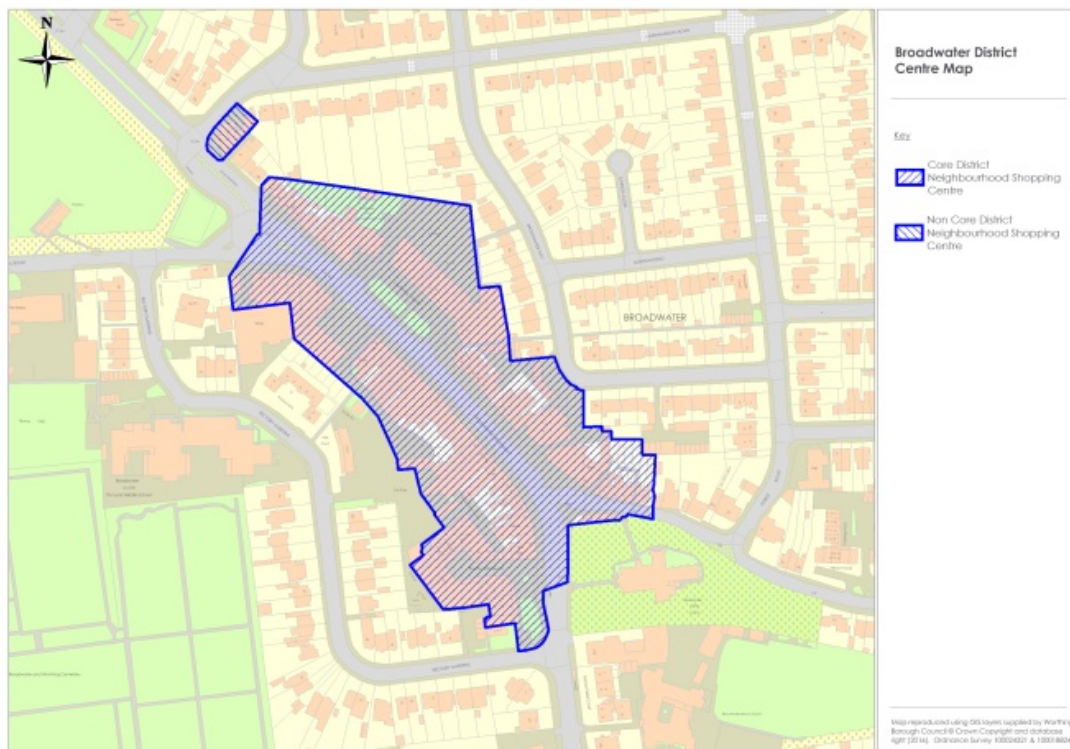
Broadwater District Centre

- 6.12 Broadwater district centre is approximately 2.25km north of Worthing town centre. The A24 (Broadwater Street West) is the main arterial route leading out of Worthing town centre to the wider sub-region. The road directly links Broadwater to the northern boundary of Worthing town centre, and regular bus services operate between the two destinations. The majority of frontage extends along the A24, with additional frontage being located on Cricketers Parade, Ardsheal Road and Broadwater Street East. The surrounding area comprises mainly residential dwellings, but also public open space (Broadwater Green).

District Centre Composition

- 6.13 Based on the latest survey of Broadwater (September 2014), undertaken by Experian Goad (September 2014), the district centre currently comprises 71 shop units, totalling 10,570 sq.m gross retail/ service floorspace. This is broadly similar in floorspace terms to Goring Road District Centre.

Figure 6.5: Broadwater District Centre Policy Boundary



Source: Worthing Borough Council

- 6.14 Tables 6.3 and 6.4 outline the composition of uses across the centre by unit number and floorspace. The floorspace data demonstrates that the proportion of comparison, convenience and leisure services is below the national average, whilst the proportion of retail services and financial and business services is substantially higher than the national average. The figures suggest a more unbalanced centre compared to Goring Road District Centre in terms of the mix of uses.

Table 6.3: Broadwater Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	24	33.8	31.82	+1.98
Convenience	6	8.45	8.66	-0.21
Retail Service	12	16.9	14.02	+2.88
Leisure Services	12	16.9	23.45	-6.55
Financial & Business Services	12	16.9	10.6	+10.3
Vacant	5	7.04	11.15	-4.11
Total	71	100	100	-

Source: Experian Goad Category Report (September 2014)

Table 6.4: Broadwater Composition of Uses (Floorspace sq.m gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Comparison	3,518	33.25	35.84	-2.59
Convenience	1,273	12.05	15.22	-3.17
Retail Service	1,821	17.24	6.73	+10.51
Leisure Services	1,923	18.21	24.53	-6.32
Financial & Business Services	1,691	16.01	7.97	+8.04
Vacant	344	3.25	9	-5.75
Total	10,570	100	100	-

Source: Experian Goad Category Report (September 2014)

- 6.15 The centre is anchored by two small convenience goods stores: Tesco Express on Broadwater Street West and Co-Op on Cricketers Parade. The Co-Op store has recently been refurbished in line with the company's national re-branding. The provision of other smaller, independent convenience stores is limited to W D Hunt butchers. The only bakery in the district centre – Forfars the Sussex Bakery – has closed in the period since September 2014, and has been re-occupied by Subway sandwich shop.

Figures 6.6 & 6.7: Broadwater District Centre



- 6.16 Like Goring, the proportion of comparison goods floorspace is below the national average and focused on the sale of specialist/niche goods. Again this is consistent with the role of a more local District Centre. Operators include The Window Showroom, Freestyle Bedrooms, Quest Adventure Cycle and Repairs, Hanwells Household Goods and Sussex Party Goods. There are around four charity shops, two fewer than that identified in the 2014 Experian survey.
- 6.17 Four comparison goods operators have closed since September 2014, including Worthing Audiology Centre, GT Furniture, Sue Ryder Charity Shop and Link to Hope Charity Shop. Two of these units – GT Furniture and Sue Ryder – were located within the Broadwater Boulevard, a dated precinct which suffers from a low footfall. We understand that a more flexible approach to the range of uses which are permitted has been taken by the Council to Broadwater Boulevard in recent years in order to encourage the letting of units and introduce more footfall through the area; this

more flexible approach has resulted in a new medical centre and pharmacy opening in the precinct, which we would consider to be a positive addition to the centre which enabled a greater range of uses to be introduced

- 6.18 The proportion of 'retail services' is above the national average and includes a Post Office, an opticians, a laundrette and a fancy dress shop, alongside a number of hair and beauty salons. Similarly, there is a strong proportion of 'financial and business services' including estate agents, solicitors, employment agencies, banks and financial advisors. Our analysis has noted the recent closure of HSBC and Lloyds bank, both of which remain open in Goring Road District Centre. Combined, the retail and financial/business categories provide a good choice and range of everyday service requirements.
- 6.19 The Experian Goad survey highlights a below average proportion of leisure services, within which is a high proportion of fast food take-aways; these include Golden Bowl Chinese, KFC (which has recently been extended into the adjoining Martin's newsagents), Domino's Pizza and Noori's Chinese. There are a number of cafes/restaurants supporting daytime leisure activities, including Muldoons Café, Starbucks Coffee Shop, Cappuccinos Coffee Shop and the Piggery Sandwich Bar. A good quality new restaurant – Pizarelli – recently invested in the centre, but has since closed following a traffic accident damaging the building.

Figure 6.8 Cricketers Parade, Broadwater District Centre



- 6.20 The vacancy rate remains below the national average with just five vacant units in September 2014. Since this time three previously vacant units have been re-occupied by Pizzarelli, Beach House Chiropractic and Cooks Chemist. A further five have, however, become newly vacant following the closure of GT Furniture, Sue Ryder Charity Shop, HSBC, Lloyds Bank, and Worthing Audiology Centre. There are currently seven vacant units in Broadwater District Centre.

Customer Views and Behaviour

- 6.21 A more specific household telephone survey was undertaken in September 2016 and the following summaries have been produced:
- Respondents were asked which District Centre (West Durrington, Goring Road and Broadwater) they visited most often. Goring Road achieved the highest response, being visited by the greatest proportion of respondents (42%) compared to 25% citing West Durrington and 33% citing Broadwater.
 - Those who use Broadwater District Centre do so much less frequently than those using Goring Road. No-one visits the centre daily (compared to 25.3% Goring Road), and only 15.8% visit 1-2 times a week (compared to 22.8% Goring Road). The proportion of those using Broadwater less often, i.e. once a month (25.6%) is higher than for Goring Road (14.7%).
 - Dwell time is good, with 71.4% staying in the centre between 16 minutes and 1 hour 29 minutes, compared to 65.2% in Goring Road. The largest majority of respondents (31.9%) said their length of visit was between 16 and 30 minutes.
 - Respondents were asked what the main purpose of their trip to Broadwater district centre is usually. The most cited response was non-food (39.9%), followed by food shopping (26.6%) and then cafes/pub/restaurant (7.3%).

- When asked what they liked the most about Broadwater, 24.5% of respondents said it was due it being close to home, with an additional 17% saying it was the attractive environment. A further 10.8% stated that it was easy to park, 9.3% that it was close to work, and 4.7% that it is compact/easy to get around.
- When asked what they disliked about Broadwater, the most frequently cited response as lack of parking (12.5%), followed by too few service businesses such as banks (6.1%). This second response might reflect local concerns about the recent closure of HSBC and Lloyds banks. Further responses included traffic congestion (4%), and choice of shops (6.2%).
- Currently, 81% of those visiting Broadwater do so by car, whilst 13.4% walk. No alternative modes of transport are used. It is apparent why lack of parking is cited the greatest dislike of visitors.

West Durrington District Centre

- 6.22 West Durrington district centre is located approximately 6km north west of Worthing town centre, and is very different to Goring Road and Broadwater in terms of composition and layout. The centre is focused on Tesco Extra, the largest foodstore in the borough, with a small range of operators under the same roof but offering external access arrangements. The centre benefits from a large, free car park. The surrounding area is predominantly residential to the east and north east, and largely green space to the west.
- 6.23 Experian do not survey West Durrington and our assessment is informed by GVA site surveys undertaken during October 2016 (Table 6.5).
- 6.24 The Tesco Extra foodstore has a net sales area of 8,154 sq.m, with a net convenience goods sales area of 4,892 sq.m. The store is open 6am – midnight, and offers a bakery, fishmonger, butcher, cheese monger, and dell/pizzeria. Around 40% of the store is allocated to non-food goods ranging from clothing, electrical goods, home-wares, soft furnishings, toys, books, household goods and other convenience items.

Figure 6.9 & 6.10: West Durrington District Centre



District Centre Composition

- 6.25 The retail offer in West Durrington district centre is summarised in Table 6.5.

Table 6.5: West Durrington Retail Composition

Unit Name	Use Class	Category
Tesco Extra	A1	Convenience
Tesco Mobile	A1	Comparison
Co-op Travel	A1	Retail Services
Costa	A3	Leisure Services
Lloyds Pharmacy	A1	Comparison
Marie Curie Charity Shop	A1	Comparison
Opticians	A1	Retail Services

Pets Corner (Pet Shop)	A1	Retail Service
Quality Kwik Dry Cleaner	A1	Retail Service
Subway	A1	Leisure Service
Sweeney Todds (Hairdresser)	A1	Retail Service
WHSmith	A1	Convenience

Source: GVA site visit, October 2016

Customer Views and Behaviour

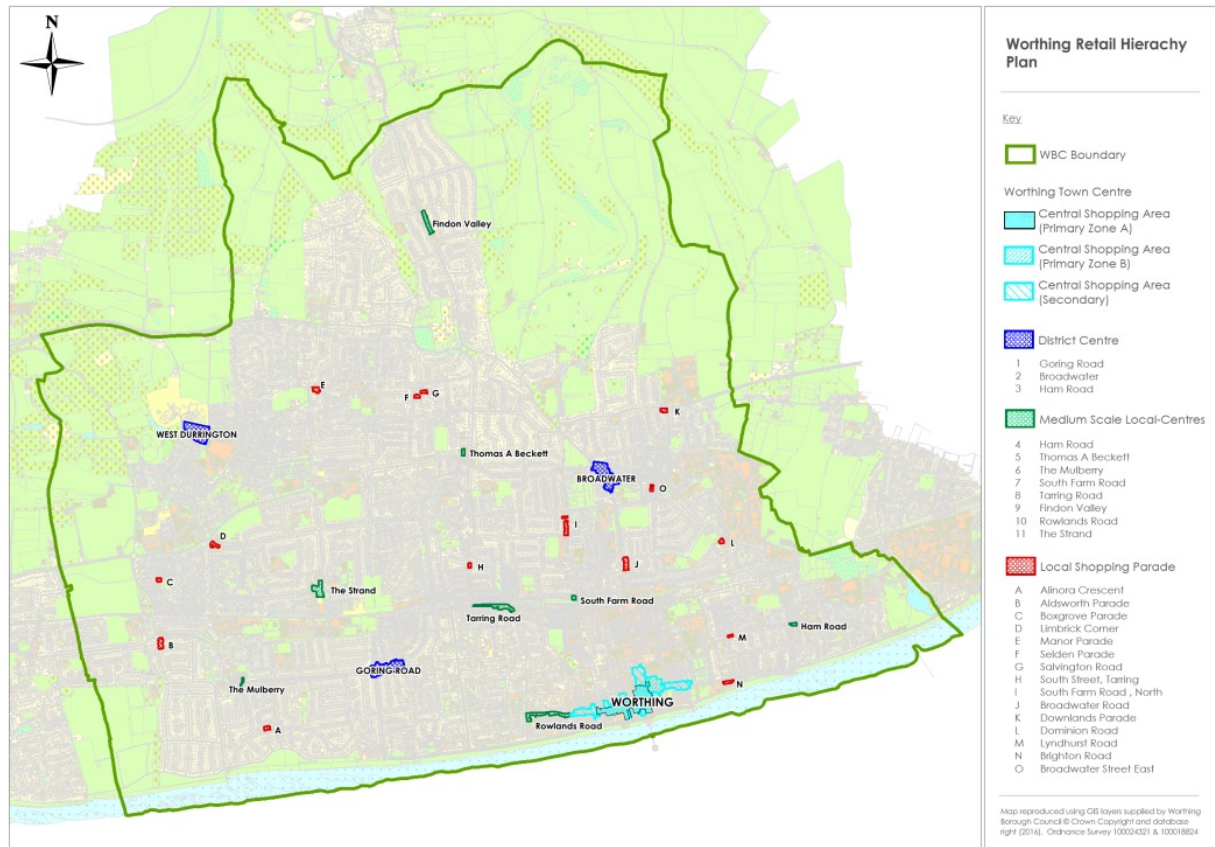
6.26 Although there was no Experian Goad survey for the district centre, the household telephone survey conducted by NEMS market research, in September 2016 was still applied. The following findings have been summarised:

- Respondents were asked which District Centre (West Durrington, Goring Road and Broadwater) they visited most often. Goring Road achieved the highest response, being visited by the greatest proportion of respondents (42%) compared to 33% citing Broadwater and 25% citing West Durrington. This reflects a 'weekly' or 'monthly' function for a main food shop, rather than 'daily' visits to the more traditional district centres at Goring Road and Broadwater.
- In terms of frequency of visit, the results reflect the district centre's role as a main food shopping destination and associated customer loyalty, with 46.4% visiting at least once a week, and 36.1% visiting once a month. Only 6.4% visit less often.
- Similarly, dwell time again reflects the main food shopping role of the district centre and limited town centre experience; 76.5% staying for less than 1 hour 30 minutes, and a further 12.3% stay for an extra half hour up to 2 hours.
- Respondents were asked what the main purpose of their trip to West Durrington is usually; 51.9% of respondents mainly use the district centre for food shopping, with 24.3% citing café/pub/restaurant. Despite the large comparison goods offer inside the Tesco store, only 2.1% state non-food shopping. Shoppers are likely to purchase non-food goods as a linked trip with their main food shopping, or undertake secondary trips for this type of shopping trips.
- When asked what they liked about West Durrington, the most frequently cited responses included the environment (17.4%), close to home (14.7%), easy to park (11.6%), good range/quality of shops (36.9%).
- There was very little that respondents disliked about West Durrington, but road-works was cited by 9.4%.
- Currently 75% of people visiting West Durrington do so by car/van, whilst 18.9% walk. Without exception, all drivers park in the main car park.
- In terms of desired improvements, 12.6% suggested that more pubs, restaurants and café's would be beneficial.

Medium and Small-Scale Local Centres

6.27 Worthing Council identifies eight medium-scale local centres and fifteen small-scale local centres. Their geographical locations are illustrated on **Figure 6.11** below, and the full local centre audits are set out in the Matrix attached in Appendix 2.

Figure 6.11: Worthing Borough Retail Hierarchy



Source: Worthing Borough Council

Medium-Scale Local Centres

- 6.28 In total, there are 8 medium-scale local centres within the WBC boundary, evenly distributed throughout the main urban area. The average number of retail units is 47; however the individual centres do differ in size, ranging from 'Thomas A. Beckett', which has a total of 24 retail units to 'Tarring Road' which comprises 111 retail units.
- 6.29 Each of the medium local centres are anchored by a small foodstore operator, including Tesco Express's, Co-Op's, Sainsbury's, Spar's, and McColl's; some have more than one. All have a newsagent/off license and all but South Farm Road has at least one supplementary bakery, butchers or greengrocers.
- 6.30 Each centre has a selection of other retail and service operators, with Tarring Road offering a Post Office, Pharmacy, ATM, Laundrette/Dry Cleaners, café, public house, take-way and hairdressers/beauty salon. The remaining seven medium sized centres offer a selection of these facilities. None of the medium-scale local centres offers doctor's surgery or library within their defined centres, although in some instances these facilities are available within a short distance of the centre (for example Findon has doctor's surgery and a library nearby; Strand has a surgery; and Mulberry has a library).

Small-Scale Local Centres

- 6.31 There are currently fifteen small-scale local centres within the WBC boundary. Some of the small-scale local centres have a very limited range of facilities; for example Boxgrove Parade and Salvington Road offer just four units, whilst others are larger; the largest (South Farm Road (North)) has twenty units. The audits are attached in Appendix 2 and demonstrate that these centres have a more limited retail and service offer compared to the medium sized centres.
- 6.32 Most have between 2-5 of the key comparison/service categories listed in the matrix, with Limbrick Corner for example offering a Post Office, ATM, Café, take-away and hairdressers. The mix throughout the centres varies. Around half have a small convenience store, and local centre composition largely comprises retail service units including hairdressers/beauty salons and leisure service units, namely cafés and takeaways.

Summary

- Goring Road is a strong performing District Centre. It has a good balance of uses, focused primarily in the convenience, retail service and financial/business service categories. This is to be expected in a district centre. The number of leisure services is below average, but the quality is good including Lazy Brunch Kitchen, Mad Hatters and recent investment by Costa Coffee. There are some fast food take-aways, but these do not dominate the retail composition of the centre. Goring Road is the most used district centre in the borough; it is a busy, attractive centre with wide pavements and plentiful free on-street parking; there is a low vacancy rate, high frequency of visit and a good dwell time.
- Broadwater Road is similar in scale to Goring Road, but it is located on a busier through-route – the main A24 arterial route out of Worthing. The pavements are wider and there is less of a barrier to the road when compared to Goring Road. This location impacts on the consumer experience and attractiveness of the centre. Broadwater is the second most visited district centre in the borough after Goring Road.
- Overall, Broadwater District Centre provides a good choice and range of businesses, albeit falls marginally short of the quality identified in Goring Road District Centre. There are, for example, fewer national multiples and two major banks have recently closed. The mix of uses is not as balanced when compared to Goring Road, exhibiting a strong proportion of retail and financial/business services. There has been recent investment from Starbucks and Pizarelli, and both foodstores are modern in appearance, and there is a good selection of daytime cafes.
- Broadwater Boulevard is identified as a poor performing part of the district centre with high vacancy rate and low footfall. A strategy for the ground floor should be a strategic priority for the Council moving forwards. The centre does benefit from free on-street parking for up to 2 hours, but appeared less busy than Goring Road during site visits.
- West Durrington District Centre is centred on Tesco Extra, the largest foodstore in the borough with a high proportion of non-food comparison products. The results of the analysis highlighted the centres role as a main food shopping destination with a high frequency of visit and dwell time primarily between 1.5 and 2 hours. The most frequently cited reason for visiting was food shopping, albeit a strong proportion noted cafes/pubs/restaurants – an offer which many would like to see expanded and improved on in the future. The centre benefits from large-scale free car parking.
- Worthing borough has 8 medium sized local centres, and 15 small sized local centres, all reasonably well distributed throughout the borough. The analysis of composition demonstrates that the retail hierarchy is 'fit for purpose' and accurately reflects each centres scale and role. Many offer smaller scale convenience stores and a range of other retail services such as Post Offices, hair dressers, pharmacy's, laundrette's and ATM's.

7 Quantitative need

- 7.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the borough. We set out the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2033, incorporating interim years of 2021, 2026 and 2031. The quantitative tabulations accompanying this assessment are set out in Appendix 3 (convenience) and 4 (comparison).
- 7.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns (2016) to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline position we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Worthing study area;
 - Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
 - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.
- 7.3 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough, having regard to the identified performance of existing floorspace.

Calculation of quantitative 'need'

- 7.4 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns which has been undertaken in support of this study (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area.
- 7.5 The process for calculating quantitative 'need' is essentially unchanged from that in the 2009 Study, and is shown diagrammatically overleaf.

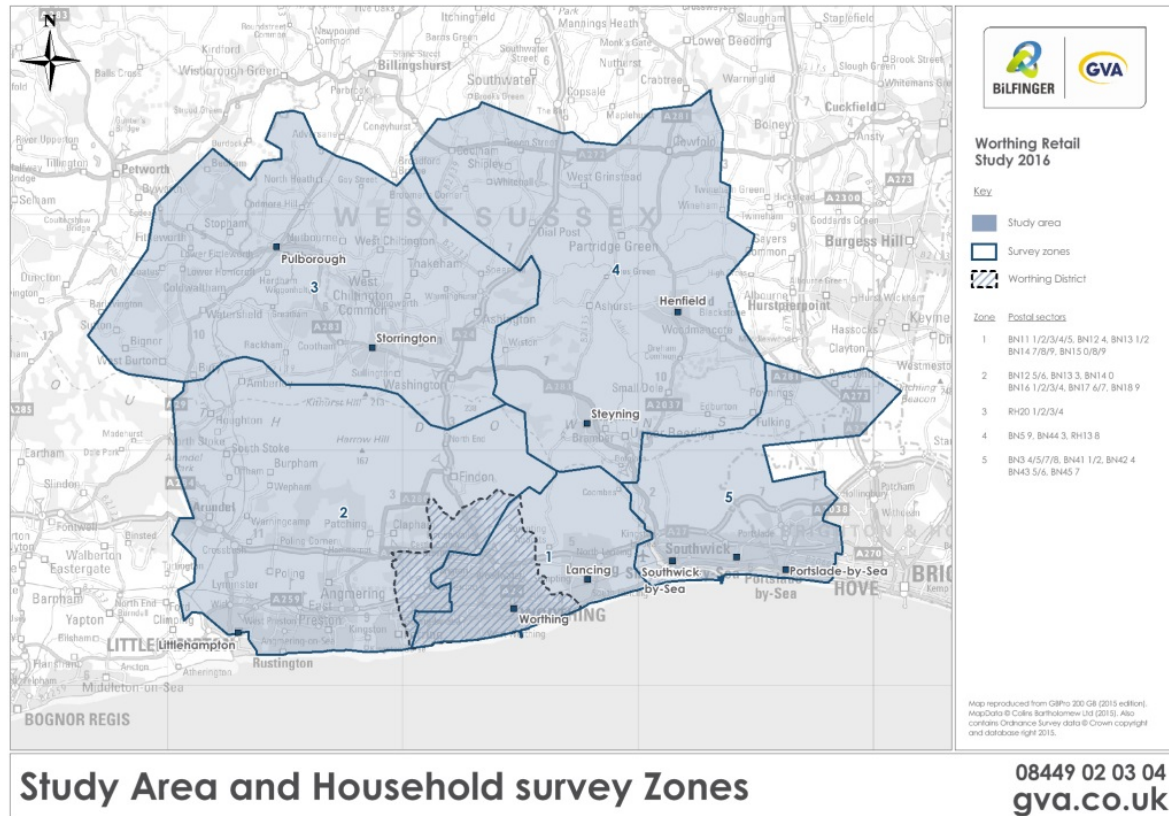
Stages of a quantitative need assessment



Survey Area and Household Telephone Survey

- 7.6 In order to identify shopping patterns across the Borough, GVA commissioned a new household telephone survey covering 500 households across 5 survey zones (100 surveys per zone). GVA designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in September 2016. NEMS have confirmed that this represents a robust and statistically accurate sampling level. The survey area is shown on Plan 1, and is reproduced as **Figure 7.1** below.

Figure 7.1: Household Telephone Survey Area Plan



- 7.7 The survey results (2016) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.
- 7.8 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 7.9 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:
- Clothing and footwear;
 - Furniture, floor coverings and household textiles;
 - DIY and decorating goods;
 - Domestic appliances;
 - Audio-visual equipment;
 - Personal and medical goods; and
 - Recreational and luxury goods.
- 7.10 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Population

- 7.11 Population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2001 census for small, localised area. Overall, the population of the survey area in 2016 is estimated to be 348,561. It is forecast to grow to 361,642 by 2021, 375,398 by 2026, and 388,616 by 2031. By 2033, the population of the survey area is forecast to reach 393,609. This represents an overall increase of 12.9% over the course of the assessment period.

Available Expenditure in the Survey Area

- 7.12 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2014 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 13 and are set out in Table 2 of Appendices 3 and 4 respectively.
- 7.13 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies (Retail Planner 13):
- For convenience goods we have applied growth rates of -1.8% pa between 2014 and 2015; -0.2% pa between 2015 and 2016; 0.1% pa between 2016 and 2017; 0.3% pa from 2017 to 2018 and 0.1% from 2018-2033.
 - For comparison goods we have applied growth rates of 5.5% pa between 2014 and 2015; 5.3% pa between 2015 and 2016; 3.2% pa between 2016 and 2017; 2.9% pa from 2017 to 2018, 3% pa between 2018 and 2023 and 3.2% from 2023-2033.
- 7.14 These growth rates reflect our expectation that spending on comparison goods will grow faster than convenience goods, as the scope to purchase more food is more limited. These assumptions take into account current economic uncertainty and a more tentative market.
- 7.15 Taking these considerations into account, expenditure has been generated within each zone to highlight variations across the survey area. Using the growth rates above and applying relevant deductions for SFT, total available expenditure across each of the zones and the survey area as a whole has been grown in five year intervals (of 2021, 2026, 2031) up to 2033.
- 7.16 Appendix 3, Table 3 applies per capita expenditure within each zone to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2016 is £758.1m. This is forecast to grow to £780.5m by 2021, £808.2m by 2026, £834.5m by 2031, and to a total of £898.9m by 2033. This equates to an overall growth of £140.8m between 2016 and 2033 (18.6% growth) (Appendix 3, Table 3).
- 7.17 Comparison goods expenditure within the survey area at 2016 is £1.2bn. This is forecast to grow to £1.4bn by 2021, £1.7bn by 2026, and £2.07bn by 2031, to a total of £2.23bn by 2033. This equates to an overall growth for comparison goods expenditure in the survey area of £1,028m between 2016 and 2033 (85.5% growth) (Appendix 4, Table 3).
- 7.18 Longer term projections should be treated with caution due to the potential for changing economic circumstances and susceptibility of longer-term forecasts to margins of error.

Convenience Goods: Floorspace Performance

- 7.19 Key foodstore provision includes the Worthing town centre M&S, Iceland, Tesco Express and Co-op, and the edge of centre Waitrose and Lidl. Additional key anchors include the Tesco Extra in West Durrington District Centre, the Co-Op in Goring Road District Centre, and the Tesco Express in Broadwater District Centre. Additional major foodstores are provided in out-of-centre locations and include Sainsbury's at Lyons Farm, and Morrisons at Newland Street to the north of Worthing town centre.
- 7.20 Table 7.1 summarises the most popular foodstores in the borough, based on turnover derived from the survey area. It shows the Tesco Extra at West Durrington District Centre to be the most popular foodstore, attracting a convenience turnover of £56.3m. This is followed by Sainsbury's at Lyons Farm, Tesco Express at Broadwater, Lidl on North Street, and Morrisons on Newland Street. The Worthing town centre foodstores are limited in their popularity, highlighting the role of the higher order centre as a predominantly mainstream comparison destination.

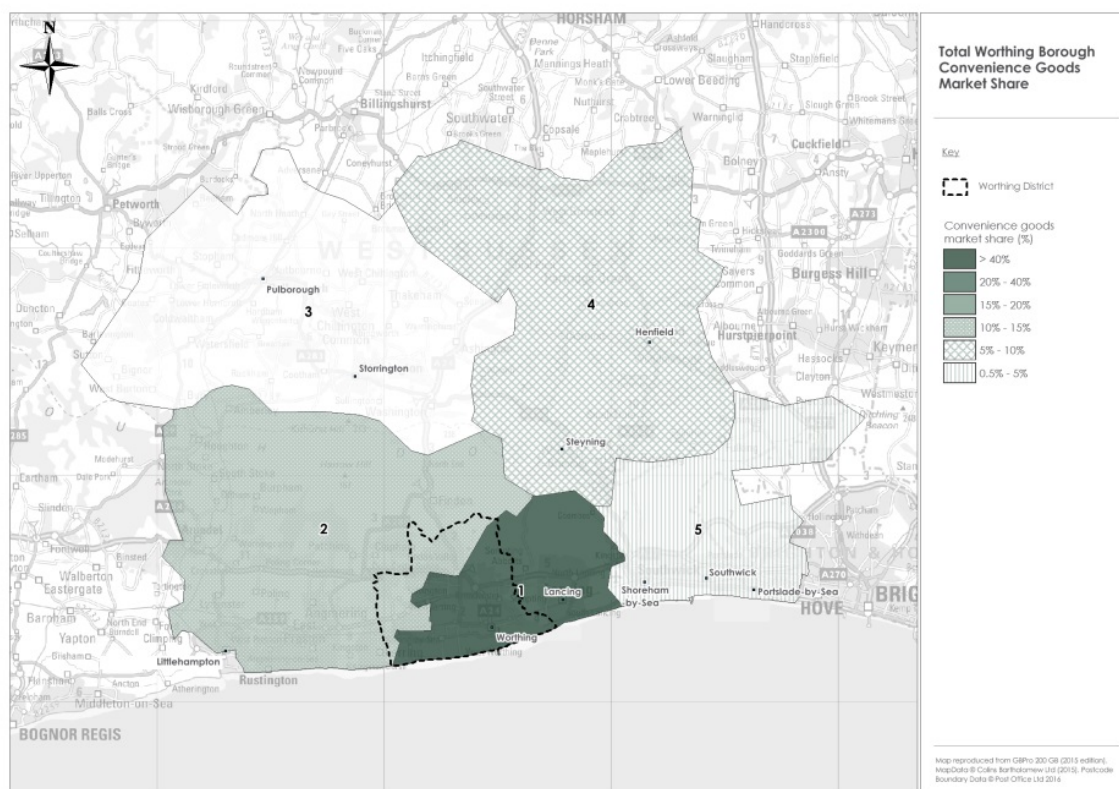
Table 7.1: Most Popular Foodstores in Worthing Borough by Turnover

Foodstore	Convenience goods turnover (£m)	Sequential Location
Tesco Extra, West Durrington	£56.3m	District Centre
Sainsbury's, Lyons Farm	£47.2m	Out of Centre
Tesco Express, Broadwater	£18.4m	District Centre
Lidl, North Street	£16.8m	Edge of Centre
Morrisons, Newland Street	£10.8m	Out of Centre
Co-Op, Goring Road	£8.5m	District Centre
Waitrose, High Street	£8.1m	Edge of Centre

Source: Table 5b, Appendix 3

- 7.21 Within the Zone 1-5 Survey Area, the combined 'market share' of the main foodstores in Worthing Borough is 22.6%. In other words, just over £1 in every £5 available to residents of the survey area is spent at foodstores in the Borough. Whilst at face value this appears a relatively low level of trade retention, we would not consider it to be a cause for concern given the extent of the survey area boundary (see Figure 7.1) and the fact that residents generally shop for convenience goods within their local area.
- 7.22 It is therefore more relevant to focus on local trade retention levels with Zone 1, the zone most closely related to Worthing's borough boundary. Within Zone 1, the main foodstores in Worthing borough have a 55.3% market share, whilst the remaining 44.7% is accounted for by 'other' smaller local stores in the borough together with some trade leakage to destinations outside the borough boundary. **Figure 7.2** illustrates the combined market share of the main foodstore destinations in Worthing Borough, showing that these stores attract strong market share from residents in zone 1 and to a lesser extent zone 2, but exert a much more limited influence over convenience goods shopping patterns beyond this.

Figure 7.2: Worthing Borough Convenience Goods Market Share



Source: household telephone survey results

- 7.23 A finer grained analysis of the telephone survey results identified those foodstores beyond the borough boundary attracting residents living in core Zone 1, i.e. those most competitive with Worthing foodstores. These include:

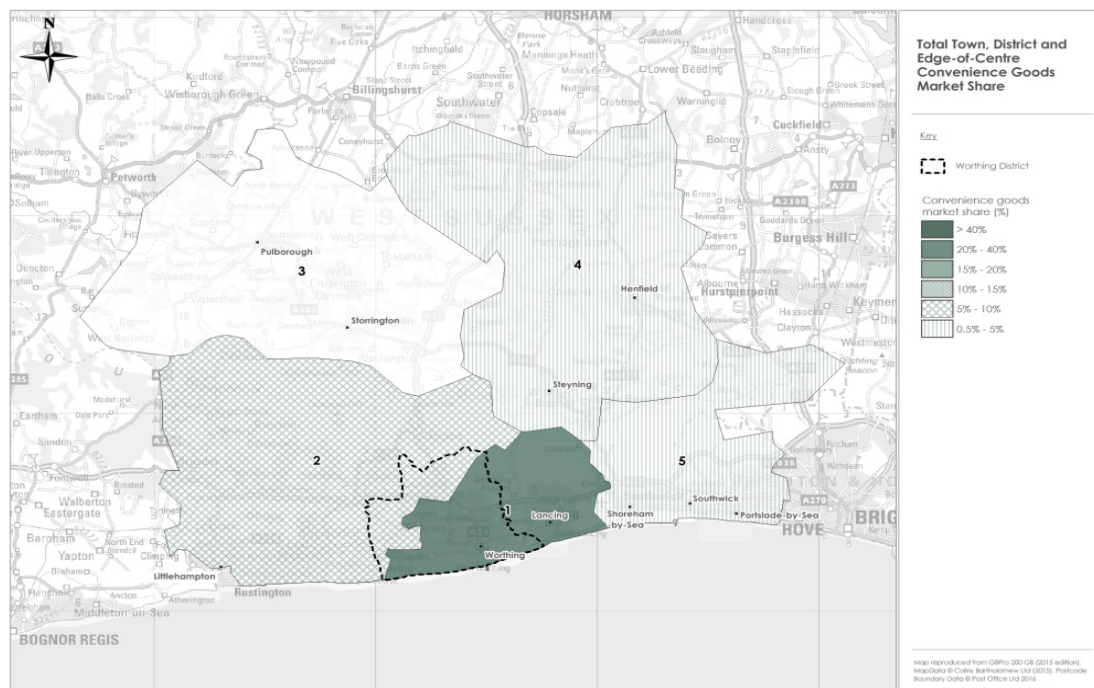
- Tesco Extra, Shoreham-by-Sea;
- Asda, Littlehampton Road, Ferring;
- Sainsbury's, Rustington;
- Lidl, The Malthouse Estate, Shoreham; and
- Co-Op, North Road, Lancing

7.24 In addition to those destinations listed above, foodstores further afield with an influence on the shopping patterns of those living within Zones 2-5 include:

- Sainsbury's, Old Shoreham Road, Hove;
- Aldi, Portslade, Brighton;
- Tesco Metro, Pulborough;
- Waitrose, Storrington; and
- Sainsbury's, Pulborough

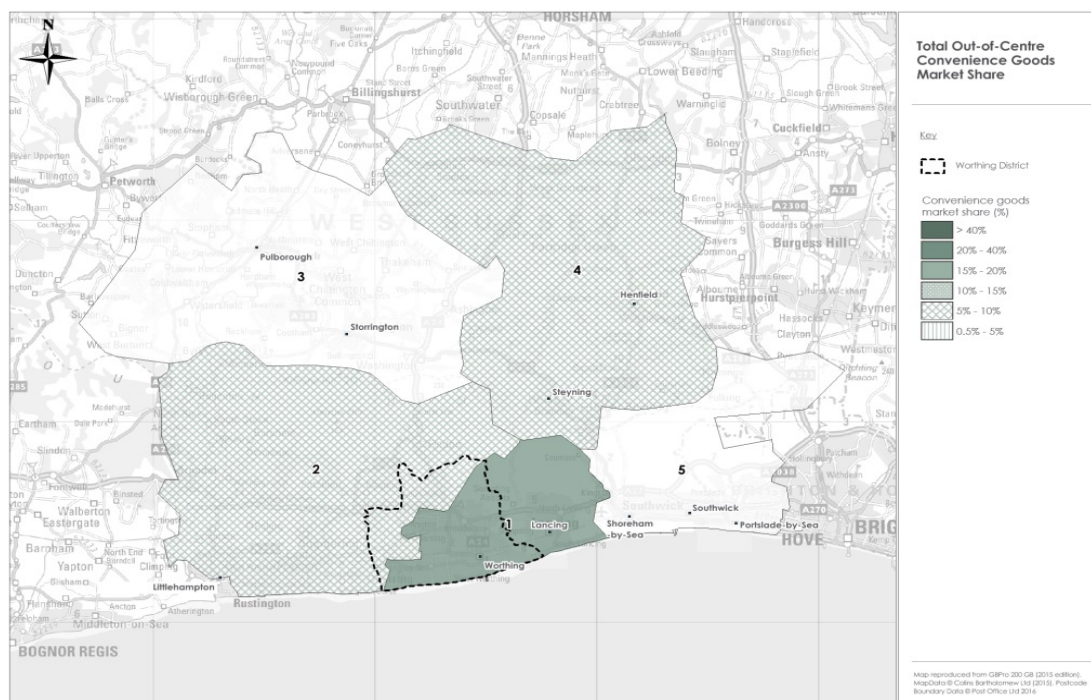
7.25 The analysis has enabled a broad comparison between the performance of borough out-of-centre foodstores and the borough's town, district and edge-of-centre foodstores. **Figure 7.3** illustrates the market share of foodstores in Worthing town centre, the district centres and the edge-of-centre Waitrose and Lidl. **Figure 7.4** illustrates the market share of out-of-centre foodstores in Worthing Borough – notably the Sainsbury's at Lyons Farm and the Morrison's at Newlands Road.

Figure 7.3: Worthing Town, District & Edge-of-Centre Convenience Goods Market Share



Source: household telephone survey results

Figure 7.4: Worthing Borough Out-of-Centre Convenience Goods Market Share



Source: household telephone survey results

- 7.26 Overall, the town and edge-of-centre locations combined achieve a survey area market share of 14.9%, whilst the two out-of-centre destinations achieve a combined market share of 7.7%. This does not identify the 'performance' of individual stores and does not suggest a need for further out-of-centre floorspace, but merely highlights the balance in favour of sequentially preferable locations (when combined) at the current time, which the local authority should seek to maintain.
- 7.27 We discuss the performance of individual foodstores below, which will directly inform our conclusions in respect of the extent of identified floorspace 'need'.

Worthing Town Centre

- 7.28 Key foodstores in Worthing town centre include M&S Simply Food Montague Street, Iceland South Street, Tesco Express Chapel Road and Co-Op, Rowlands Road, and our methodology has estimated the market share of these destinations for convenience goods shopping (Appendix 3, Table 4). The analysis has highlighted that these stores attract a very low market share from the survey area, even in Core Zone 1. As a consequence, it is not possible to provide an indication of quantitative performance; but in qualitative terms the presence of these stores shows that Worthing town centre has a good network of smaller top up convenience shops, likely meeting the needs of local 'passing' trade and some irregular top up shopping trips. Worthing town centre does not, therefore, have a significant role and function as a convenience goods shopping destination, but its smaller convenience stores serve to complement the wider comparison goods, commercial leisure and tourism offer.

Worthing Edge of Centre

- 7.29 Worthing has two edge-of-centre foodstores - Lidl and Waitrose, located on adjacent sites. Based on a net convenience goods floorspace of 648 sq.m we estimate that the Lidl store has an average sales density of £25,926 per sq.m net which is substantially above the Lidl company average sales density of £3,487 per sq.m net.
- 7.30 The Waitrose store is larger, and the analysis suggests is under-performing at £4,535 per sq.m net compared to the company average of £12,429 per sq.m net. Qualitatively the Waitrose appeared to be a popular and well used store, and this analysis of two adjoining stores demonstrates the popularity of the Lidl discount foodstore compared to Waitrose. Combined, the destinations – which are likely to benefit from linked trips – are trading in equilibrium.

Worthing Out of Centre

- 7.31 The out-of-centre Sainsbury's store is located at Lyons Farm within the main concentration of the borough's non-food retail warehousing. We estimate the store currently has a turnover of approximately £47.2m, the second highest

turnover in the borough after Tesco Extra at West Durrington. Based on this turnover, and with a net convenience goods sales area of 2,084 sq.m, we estimate the sales density to be £22,649 per sq.m net, substantially higher than Sainsbury's company average of £12,053 per sq.m net. The store is trading strongly.

- 7.32 The Morrisons store, located to the north of Worthing town centre has a convenience goods turnover of only £10.8m, equating to a sales density of £4,500 per sq.m net, considerably lower than expected company averages of £12,722 per sq.m net.

Goring Road District Centre

- 7.33 As well as a number of smaller independent convenience stores, Goring Road District Centre offers a Co-Op, Iceland and Tesco Express. It is apparent that the Co-op performs the role as the key anchor foodstore with a turnover of £8.5m and a performance sales density of £24,000 per sq.m net. This is substantially above Co-Op's company average sales density of £7,741 per sq.m net, but on the basis that the Iceland and Tesco stores do not register in the survey results it is more likely that this turnover will be distributed to a greater extent throughout the foodstore operators. The results do, however, highlight the important role of Co-Op to the health of the District Centre and its current strong performance.

Broadwater District Centre

- 7.34 Foodstore operators in Broadwater District Centre include Co-op and Tesco Express, and, like Goring Road, one foodstore is particularly dominant. The Tesco Express has a turnover of £18.4m, substantial in scale for a small top-up foodstore. There is no car park but it does adjoin an extensive walk-in residential area, and also sits on the main through-route into Worthing town centre, benefiting from free on-street car parking.

West Durrington District Centre

- 7.35 West Durrington is anchored by Tesco Extra, the largest foodstore in the borough. Based on a net convenience goods floorspace of 4,892 sq.m and a turnover of £56.3m, the store has a performance sales density of c.£11,509 per sq.m net – in line with expected company average sales densities. The store is performing well, and not over-trading.

Convenience Goods: Quantitative Need

- 7.36 Based on population and expenditure growth, the detailed performance analysis of existing floorspace, and a sales efficiency for existing floorspace of 0.1% per annum, we believe there is only a small capacity to support further convenience goods floorspace over the plan period.
- 7.37 Some foodstores are trading very well (Sainsbury's, Lidl, Co-Op Goring Road, Tesco Express Broadwater), but a number of others are showing signs of under-performance in quantitative terms. On balance, when combined, the current convenience goods floorspace in the borough is trading in equilibrium, leading to negligible capacity arising to the period 2026.
- 7.38 Convenience goods floorspace need can be quantified as follows:
- Our projections are summarised in Appendix 3, Table 7, which indicates that by 2021 there will be an identified residual expenditure of £2.9m, and this is set to grow to £8.8m by 2026, £14.3m by 2031, and again to £28.3m by 2033.
 - Based on average sales densities of the major foodstore operators (£10,000 per sq.m net in 2016) we forecast need for 292 sq.m net by 2021, growing to 876 sq.m net by 2026, 1,410 sq.m net by 2031, and 2,788 sq.m net by 2033.

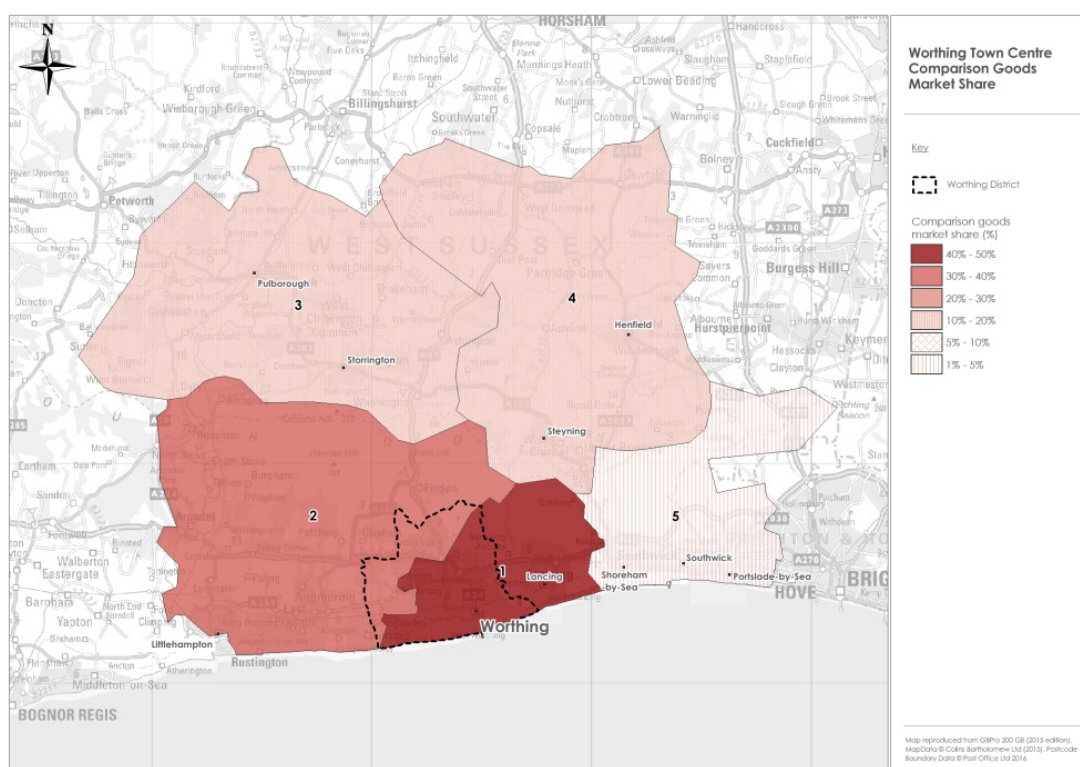
Comparison Goods: Floorspace Performance

- 7.39 Figure 7.5 illustrates Worthing town centre's market share across the survey area, highlighting variations in influence. It is evident that Zone 1 is the core catchment, followed by Zone 2, then Zones 3 and 4, and finally Zone 5. Worthing's catchment area is constrained predominantly by Chichester to the west, Horsham to the north and Brighton and the Holmbush Centre Shoreham to the east.
- 7.40 Within the survey area, Worthing town centre draws 24.3% of comparison goods expenditure (£292.5m). As noted above, the majority of this spend comes from Zone 1 (44.7% market share) and Zone 2 (30.3% market share), but the town centre also draws some trade from Zone 3 (12.6% market share), Zone 4 (9.7% market share) and Zone 5 (2.8%

market share). Worthing town centre has the most limited market share in Zones 4 and 5 as a consequence of proximity to Brighton, the Holmbush Centre and Burgess Hill.

- 7.41 There is a clear opportunity for Worthing town centre to uplift market share in Zone 1 and across the Survey Area. Currently 9% of Zone 1 trade is travelling to major destinations outside the borough, and the aspiration should be to claw this back to Worthing. In Zone 3 and 4, the key competing destination is Horsham which achieves a 26.4% and 23.3% market share respectively, despite being located some distance to the north. Zone 3 and 4 residents sit equidistantly between Worthing and Horsham, but Worthing is currently far less successful in attracting trade from these residents (12.6% and 9.7% from Zone 3 and Zone 4).
- 7.42 Worthing currently has a stronger trade draw performance in Zone 2 (30.3%), but there is opportunity to consolidate this further, clawing back from Chichester in the west. The enhancement of trade draw from Zone 5 will be more difficult given the strength of the Holmbush Centre and Brighton, but there is an opportunity to claw back trade from those living equidistant between competing destinations, i.e. close to the boarder of Zone 1 and Zone 5.

Figure 7.5: Worthing Town Centre Comparison Goods Market Share



Source: household telephone survey results

- 7.43 The quantitative analysis, set out in Appendix 4, estimates that Worthing town centre has a comparison goods turnover of c.£292.5m. Based on a net comparison goods floorspace of 38,029 sq.m, we estimate the town centre has a sales density of c.£7,692 per sq.m net. Based on our experience across London and South East this is a sound performance, but does not reflect a particularly strong or over-performing centre, and there is opportunity to enhance comparison goods floorspace performance per sq.m.

Comparison Goods: Retail Warehousing

- 7.44 Worthing has one main retail warehousing destination located at Lyons Farm, alongside the major out-of-centre Sainsbury's store (which is strongly over-performing). Lyons Farm Retail Park is occupied by Argos, Pets at Home, Brantano and Boots, and there is one vacant unit (we understand this is shortly to be re-occupied by Wren Kitchens); and the adjoining Downlands Retail Park is occupied by Curry's/PC World/Carphone Warehouse, B&Q, Halfords and Benson for Beds.
- 7.45 Table 7.2 and 7.3 illustrate where shoppers are visiting for their 'furniture and floor coverings' and 'DIY and Decorating Goods'. In the first category (Table 7.2), it is apparent that the network of sub-regional town centres performs well in comparison to out-of-centre destinations. Worthing town centre is the most popular, achieving a market share of

31.6% in Zone 1 and 15.1% across the survey area. Competitive out-of-centre destinations include Goldstone retail Park in Hove, Ikea in Croydon, and Carpetright on Ham Road in Worthing.

- 7.46 The telephone survey results are attached in Appendix 5, and it is apparent from a wider analysis that Horsham is the most favoured destination for those living in Zones 3 and 4, a likely consequence of the recently opened John Lewis at Home store. In Zone 2 residents prefer Worthing town centre, but also visit Chichester and Rustington; whilst Zone 5 residents are using Brighton, Goldstone Retail Park and Ikea in Croydon, with only 0.8% visiting Worthing town centre.

Table 7.2: Furniture and Floor Coverings Shopping Patterns

Location	Zone 1	Zone 1-5
Worthing Town Centre	31.6%	15.1%
Goldstone Retail Park, Hove	12.2%	13.2%
Brighton Town Centre	5.9%	7.8%
Shoreham-by-Sea Town Centre	0.0%	6.9%
Ikea, Valley Retail Park, Croydon	1.7%	5.2%
Chichester Town Centre	5.9%	4.6%
Horsham Town Centre	0.0%	4.4%
Rustington Town Centre	4.8%	4.1%
Carpetright, Ham Road, Worthing	7.6%	4.0%
Homebase, Shoreham, Hove	3.6%	3.8%
Rustington Retail Park, Rustington	7.1%	2.8%
Goring Town Centre	9.9%	2.6%

Source: household telephone survey results

- 7.47 In the DIY and Decorating Category, out-of-centre destinations dominate (Table 7.3). The B&Q store at Downlands Retail Park is the most popular by a considerable margin for those living in Zone 1. Competitive locations include B&Q in Shoreham-by-Sea and Wickes in Littlehampton, whilst Worthing Town Centre achieves a market share of 6% in Zone 1 and 4.6% in Zones 1-12.

Table 7.3: DIY and Decorating Goods Shopping Patterns

Location	Zone 1	Zone 1-5
B&Q, Downlands Retail Park	75.3%	31.0%
B&Q, Brighton Road, Shoreham-by-Sea	3.4%	23.9%
Wickes, Littlehampton	0.0%	10.6%
Homebase, Old Shoreham Road, Hove	0.0%	5.6%
Worthing Town Centre	6.0%	4.6%
Wickes, Dominion Road, Worthing	5.4%	4.4%
Homebase, Broadbridge Heath Retail Park, Horsham	0.0%	3.3%
Lyons Farm Retail Park, Worthing	4.8%	2.1%

Source: household telephone survey results

Comparison Goods: Quantitative Need

- 7.48 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sq.m net of 1.75%. Based on the performance of existing floorspace in Worthing town centre (£7,592 per sq.m net) we would expect new quality floorspace to achieve at least £8,000 per sq.m net, and have translated residual expenditure into floorspace on this basis.

- 7.49 This assessment has also assumed that Worthing will maintain existing market share and we have forecast the capacity for new floorspace in the years 2021, 2026, 2031 and 2033.
- 7.50 By virtue of growth in population and expenditure we have projected that increases in available comparison expenditure will create a residual expenditure of £30.8m in 2021, £87.5m in 2026, £164.0m in 2031 and £171.1m in 2033. This translates into surplus capacity to accommodate an additional 3,530 sq.m net by 2021, growing to 9,197 sq.m net by 2026 (Table 7, Appendix 4).
- 7.51 Given uncertainties in the economy and growing margins of error over time, we do not recommend identifying sites to meet the need beyond 2026, and the new Local Plan should 'plan' to accommodate around 9,500 sq.m net of comparison goods floorspace.
- 7.52 In the latter part of the plan period, Worthing may face increasing competition from centres and retail destinations in the wider sub-region as they improve and extend their retail offer. The challenge for Worthing will be to consolidate the shopping offer and considerably enhance the quality of the mix of retailing in order to maintain (and improve) existing market share and positioning in the sub-regional retail hierarchy. A proactive approach and strategy will be required in the short and longer term to achieve this objective.

Summary

- The quantitative analysis has identified that Worthing town centre is not performing the role of a convenience goods shopping destination, albeit the smaller top up stores do complement the wider comparison and leisure offer. The District Centres all have a strong performing foodstore anchor underpinning their vitality and viability, with Tesco Extra at West Durrington the largest foodstore – in floorspace and turnover – in the borough.
- The out-of-centre Sainsbury's is considerably more popular than the out-of-centre Morrisons foodstore which appears to be under-trading. On the edge of Worthing Town Centre, Lidl has a higher convenience goods turnover than the nearby Waitrose store — although Waitrose did appear well used during site visits, and combined the two stores are trading in equilibrium.
- Some foodstores are trading very well (Sainsbury's, Lidl, Co-Op Goring Road, Tesco Express Broadwater), but a number of others are showing signs of under-performance in quantitative terms. On balance, when combined, the current convenience goods floorspace in the borough is trading in equilibrium, leading to a minimal level of additional floorspace need to the period 2026 (876 sq.m net).
- In respect of comparison goods, the analysis found Worthing town centre to be performing satisfactorily (£7,692 per sq.m net) but identified considerable opportunity to consolidate and enhance this performance. At present, the town centre has a market share of only 44.7% in Zone 1, and 24.3% across the survey area, and there are clear opportunities to claw back lost trade, particularly from the northern and western areas.
- In the more bulky furniture and floorcoverings category, Worthing town centre is the most popular destination for those living in Zone 1 and also the wider survey area, but there are local variations. Zone 3 and 4 residents favour Horsham given the recent opening of John Lewis at Home, and Zone 5 favour Brighton, Goldstone Retail Park Hove and Ikea in Croydon. Worthing has more customer loyalty in Zone 2, but Chichester and Rustington are also popular destinations.
- In the DIY bulky goods category the B&Q at Downlands Retail Park is by far the most popular destination in Zone 1, but there is competition elsewhere in the survey area, primarily from B&Q Shoreham, Wickes Littlehampton and Homebase at Broadbridge Heath Retail Park Horsham.

8 Commercial leisure assessment

- 8.1 Commercial leisure and cultural uses are playing an increasingly important role in the vitality and viability of centres by providing complementary uses that strengthen both the daytime and evening economies of a centre. This section of the report considers the current provision of commercial leisure uses throughout the study area, including patterns of visits to restaurants, cafes, cinema, pubs, bars/clubs, theatre, health and fitness, entertainment venues, and cultural facilities. The outputs identify performance, level of attraction and any apparent qualitative gaps in the provision of these facilities.
- 8.2 We draw on national trends in the leisure sector, detailed qualitative analysis, GIS mapping and desk based gap analysis, the household telephone survey results and a broad overview of the economic growth in leisure expenditure over the forthcoming Plan period. For the purposes of this commercial leisure assessment, we have analysed leisure travel patterns across the Zone 1-5 Survey Area (as shown in Figure 7.1 in the previous section), highlighting the catchment reach of facilities in Worthing borough.
- 8.3 The telephone survey achieved the target response of 500 interviews, and within that sample 90% stated that they took part in a leisure or cultural activity. In respect of sampling, 33% were male respondents and 67% were female; and the age classifications are as follows:
- 18-24 - 6.7%
 - 25-34 - 11.5%
 - 35-44 - 18.9%
 - 45-54 - 18.6%
 - 55-64 - 25.2%
 - 65+ - 16.0%

Leisure Choices

- 8.4 The household survey results enabled the identification of the most popular leisure activities across the sub-region, the most frequent being 'restaurants' and the least frequent being 'art galleries':
- | | | | |
|-----|----------------------|---|-------|
| 1. | Restaurants | - | 67.4% |
| 2. | Cafes | - | 56.0% |
| 3. | Cinema | - | 55.7% |
| 4. | Pubs /Public Houses | - | 45.2% |
| 5. | Theatre | - | 40.1% |
| 6. | Health & Fitness | - | 25.4% |
| 7. | Family Entertainment | - | 24.4% |
| 8. | Museum | - | 18.5% |
| 9. | Children's Soft Play | - | 14.0% |
| 10. | Evening bars/clubs | - | 12.6% |
| 11. | Art Galleries | - | 10.2% |

Restaurants

- 8.5 Restaurants are the most popular leisure activity amongst those living in the study area. Within Worthing's Core Zone 1, 63.7% are choosing Worthing town centre as their first choice destination, whilst a smaller segment of the population are choosing Lancing (15%), Shoreham-by-Sea (9%), Goring District Centre (4.7%), Brighton (2.1%) and Broadwater District Centre (1.2%). Both Lancing and Shoreham-by-Sea are located within/adjoining Zone 1, and it is inevitable that a proportion of residents here will visit these centres.

Figure 8.1: Restaurants, Warwick Street, Worthing Town Centre



- 8.6 Zone 2 and 3 are located to the west of the study area, encompassing Littlehampton, Pulborough and Storrington. The preferred location for restaurants for those living in Zone 2 and 3 are set out in Table 8.1 below. In Zone 2, Worthing continues to be the most dominant centre, followed by Chichester and Rustington; whilst in Zone 3, the preferred location is Horsham followed by Petworth and Worthing.

Table 8.1: Preferred restaurant locations for those living in Zones 2 & 3

	ZONE 2	ZONE 3
Worthing	45.6%	10.7%
Horsham	0.9%	26.1%
Petworth	0.0%	11.8%
Chichester	13.1%	6.7%
Rustington	13.1%	0.0%
Storrington	0.0%	8.9%
Littlehampton	8.2%	0.0%
Arundel	4.2%	8.2%
Brighton	7.1%	3.9%

Source: household telephone survey results

- 8.7 Zone 4 and 5 are located to the east of the study area, encompassing Henfield, Steyning, Portslade and Shoreham-by-Sea. The preferred location for restaurants for those living in Zone 4 and 5 are set out in Table 8.2 below. In Zone 4, Horsham is the most dominant destination, whilst Worthing attracts little trade from this zone; in Zone 5, Brighton and Shoreham-by-Sea are the most popular, followed by Worthing, which again has a limited influence.

Table 8.2: Preferred restaurant locations for those living in Zones 4 & 5

	ZONE 4	ZONE 5
Brighton	26.3%	36.4%
Shoreham-by-Sea	4.0%	35.1%
Horsham	34.3%	0.0%
Worthing	6.0%	13.1%
Steyning	12.9%	0.0%
Hove	0.0%	8.1%
Crawley	7.8%	0.0%

Source: household survey results

- 8.8 It is apparent that in the restaurant sector, Worthing's core catchment area comprises Zone 1 and 2, followed by Zone 5, 3 and lastly 4. The district centres of Goring and Broadwater attract some trade (as a first choice destination) from Zone 1, whilst – reflective of its composition – West Durrington is not a first choice restaurant destination for anyone living in the study area.

Cafes

- 8.9 Cafes are the second most popular choice of leisure activity amongst those living in the study area. Within Worthing's Core Zone 1, 71.9% of people are choosing Worthing town centre as their first choice destination, whilst a much smaller proportion are choosing Goring District Centre (8.7%), Lancing (5.1%), Shoreham-by-Sea (4.3%) and Broadwater District Centre (1.5%). This is clearly a more localised activity compared to restaurant choices given the daytime and shorter dwell time nature of the trip; and is also a 'linked trip' activity alongside comparison goods shopping in town centres.

Figure 8.2: Café Culture, Warwick Street, Worthing Town Centre



- 8.10 The preferred location for cafes for those living in Zone 2 and Zone 3 are set out in Table 8.3 below. Worthing is the most popular destination for those living in Zone 2, followed by Rustington and Littlehampton; and Zone 3 residents are predominantly choosing Storrington, Horsham and to a lesser extent Petworth.

Table 8.3: Preferred cafe locations for those living in Zones 2 & 3

	ZONE 2	ZONE 3
Worthing	42.9%	5.3%
Storrington	0.0%	36.0%
Rustington	30.5%	0.0%
Horsham	0.0%	24.2%
Littlehampton	13.3%	0.0%
Petworth	0.0%	8.5%
Brighton	7.0%	0.0%
Durrington	0.9%	0.0%

Source: household telephone survey results

- 8.11 Table 8.4 below demonstrates the dominance of Horsham and Brighton for those living in Zone 4, and Shoreham-by-Sea for those living in Zone 5. Worthing has a market share of 4.4% and 17.3% respectively, again reflecting the 'outer' catchment of this part of the survey area. Similar to the restaurant sector, Worthing's core catchment for cafes is Zone 1 and 2, followed by Zones 5, 4 and finally 3.

Table 8.4: Preferred café locations for those living in Zones 4 & 5

	ZONE 4	ZONE 5
Shoreham-by-Sea	9.6%	41.2%
Horsham	32.6%	0.0%
Brighton	26.1%	6.6%
Steyning	18.6%	0.0%
Worthing	4.4%	17.3%
Hove	0.0%	10.8%

Source: household telephone survey results

Cinemas

- 8.12 The telephone survey results identify the dominant cinema destinations in the sub-region (**Plan 7**):
- **The Dome Cinema, Worthing:** A town centre Grade II* listed building located on the seafront with no site dedicated car parking. Originally opened in 1911, and currently owned by the Worthing Dome & Regeneration Trust, the cinema has two screens including the opulent main auditorium, seating 500, and the more intimate 'Electric Theatre'. The Dome shows a selection of the latest films 7 days a week. The cinema adjoins the bus depot 'Area of Change'.
 - **Cineworld, Chichester Gate:** an out-of-centre multiplex cinema showing the latest blockbuster in 2D and 3D formats. A ten screen cinema situated on the Chichester Gate leisure complex with large free car park, good transport links and a range of restaurants including The Gatehouse, Frankie & Benny's, Gourmet Burger Kitchen, Nando's, KFC, McDonalds, Nuffield Health Fitness & Wellbeing, Premier Inn, MFA Bowl, Domino's.
 - **Odeon, Brighton:** Located on the seafront, Odeon Brighton is an eight screen multiplex cinema, with use of the nearby car park at Churchill Square Shopping Centre.
 - **Cineworld, Brighton Marina:** an out-of-centre eight screen multiplex cinema. A 1,600 space multi-storey car park is located on site, and restaurants include McDonalds, Pizza Hut, Bella Italia, Brasserie Fish, Café Zio, Café Rouge, GBK, Las Iguanas, Malmaison, Nando's, and Pizza Express.
 - **Connaught Theatre, Union Place, Worthing:** A town centre art deco building. Built as the Picturedrome cinema in 1914, the venue was extended in 1935 and became the new home of the Connaught Theatre. Since 1987 it has been a dual use cinema/theatre with two screens, and has a seating capacity of 512. Located adjacent to the Union Place car park, the most popular car parking in Worthing town centre.

- **Cineworld Crawley:** An out-of-centre 15 screen cinema with IMAX enabled screen, free 1,000 space car park and a number of on-site restaurants including Bella Italia, Chiquito, Frankie & Benny's, Nando's, Pizza Hut, TGI Fridays, and McDonalds. A health club and bowling alley form additional key attractions.

8.13 The Dome cinema in Worthing is the most popular venue within Zone 1 (63.4%), and also has a market share in Zone 2 (10.6%), Zone 3 (5.2%), Zone 4 (15.9%) and Zone 5 (11.5%). Whilst having a good sub-regional influence, there is clearly leakage from Zone 1 to two key competing destinations beyond the borough boundary. These include Cineworld Chichester (24%) and Cineworld Brighton Marina (5.3%). The Connaught, Worthing has a 4.9% market share in Zone 1.

8.14 Within Zones 2-5 the following cinemas are identified as being the most popular:

- Zone 2: Cineworld, Chichester Gate (60%)
- Zone 3: Cineworld, Chichester Gate (34.3%)
- Zone 4: Cineworld, Crawley (36.2%)
- Zone 5: Odeon Brighton (54.8%) / Cineworld Brighton Marina (28.4%)

8.15 The Dome Cinema in Worthing town centre is clearly performing well in Zone 1 with a strong market share (63.4%), but is also losing a reasonably substantial share of the market (24%) to the large out-of-centre Cineworld at Chichester Gate. It is difficult for cinema provision in Worthing to compete with the level of free car parking and associated food and beverage facilities, tenpin bowling and health club provision on offer. There is an opportunity to enhance this type of facility/destination in Worthing to enhance market share throughout Zones 1-5, perhaps through a new multiplex or high end independent cinema brand such as 'Kino'.

Figure 8.3: Dome Cinema, Worthing Town Centre/ Figure 8.4: The Connaught Theatre & Cinema, Worthing Town Centre



Public Houses (Pubs)

8.16 Within Zone 1, Worthing town centre has the strongest market share for this type of leisure activity (60.5%), with alternative preferences including Broadwater District Centre (12% market share), Brighton (6.9%) market share, Shoreham-by-Sea (5.1% market share), and Rustington and West Durrington District Centre, each with a market share of 3.9%.

8.17 Worthing town centre also has some market share in Zone 2 (29.7%) and Zone 5 (16.1%), but draws no trade from Zones 3 or 4. Table 8.5 sets out the most popular pub destinations in Zone 2 and 3, with Worthing, Rustington and West Durrington District Centre being the most popular for those living in Zone 2, and Storrington and Pulborough being the most popular for those living in Zone 3.

Table 8.5: Preferred pub location for those living in Zones 2 & 3

	ZONE 2	ZONE 3
Storrington	0.0%	35.1%
Worthing	29.7%	1.2%
Rustington	24.5%	0.0%
Pulborough	0.0%	23.6%
Durrington	14.6%	0.0%
Brighton	8.6%	0.0%
Findon Valley	8.2%	0.0%

Source: household telephone survey results

- 8.18 **Table 8.6** sets out pub market shares in Zone 4 and 5, and demonstrates that Partridge Green, Steyning, Brighton and Horsham are the favoured locations for those living in Zone 4, whilst Shoreham-by-Sea, Hove, Southwick and Worthing are the favoured locations for those living in Zone 5.

Table 8.6: Preferred pub location for those living in Zones 4 & 5

	ZONE 4	ZONE 5
Shoreham-by-Sea	1.1%	39.5%
Partridge Green	32.1%	0.0%
Hove	5.0%	21.8%
Steyning	21.1%	0.0%
Brighton	18.2%	0.0%
Southwick	0.0%	17.3%
Worthing	0.8%	16.1%
Horsham	13.0%	0.0%

Source: household telephone survey results

- 8.19 The analysis of pub usage across the sub-region reflects the more localised, and perhaps rural, nature of this leisure activity. Destinations quoted by those living in Zones 3 and 4, such as Partridge Green, Steyning, Pulborough and Storrington, for example, highlight this point, and help explain the low market share of Worthing in this part of the more rural catchment area. These towns/villages have pleasant and attractive pub facilities. Worthing performs better in the more built up coastal parts of the survey area.

Evening Bars/Nightclubs

- 8.20 Worthing has a Zone 1 market share of 51.5% for this leisure activity, and is also identified as a destination of choice for 33% of those living in Zone 2 and 65% of those living in Zone 5. The main competing destination is Brighton, which has a strong market share across the survey area, whilst smaller bars are identified in Shoreham-by-Sea, Lancing, Sompting, Storrington and Petworth and Shipley. There is evidently an opportunity for Worthing to increase market share across the survey area, competing primarily for claw back from Brighton. Unlike a number of other leisure activities, Horsham and Chichester have a very low market share for bars/nightclubs.

Theatre

- 8.21 The most frequently cited theatre in the survey area is The Connaught Theatre in Worthing, achieving a market share across Zones 1-5 of 31.6% and a market share within Core Zone 1 of 53.6%. The theatre, as discussed above, is a multi-use facility alongside the cinema, and also attracts visitors from Zone 2 (24.6% market share) and Zone 5 (19.4% market share), and a small proportion from Zone 3 (5.9%).
- 8.22 Aside from The Connaught, Zone 1 residents are also choosing to visit Central London/West End (14.4%) and the Pavilion Theatre in Worthing (19.9%, Zone 1 market share). The Pavilion was built in 1926 and sits on Marine Parade at

the start of Worthing Pier, and aside from theatre productions, acts as a versatile multi use venue which has hosted a wide range of events from The National Lottery Prize Draw to Art and Craft fairs and dinner dances, to conferences. The Pavilion also attracts people from Zone 2 (12%), Zone 3 (6.6%) and Zone 5 (2.5%).

8.23 Consistent with most parts of the South East region, the popularity of Central London/West End is evident with strong market shares in Zone 1 (14.4%), Zone 2 (20.8%), Zone 3 (41.8%), Zone 4 (42.4%) and Zone 5 (14.4%). Elsewhere within Zones 2-5 the following theatres are identified as being the most popular (Plan 8):

- **Zone 2:** The Connaught, Worthing (24.6%) / Central London (20.8%) / The Pavilion, Worthing (12%) / Chichester Festival Theatre Chichester (15.6%);
- **Zone 3:** Central London (41.8%) / Chichester Festival Theatre Chichester (20.4%) / The Capitol Theatre Horsham (10.7%) / Theatre Royal Brighton (9.3%) / The Pavilion Worthing (6.6%) / The Connaught Worthing (5.9%);
- **Zone 4:** Central London (42.4%) / Theatre Royal Brighton (27.5%) / The Capitol Theatre Horsham (6.2%);
- **Zone 5:** Theatre Royal Brighton (52.7%) / The Connaught Worthing (19.4%) / Central London (14.4%)

8.24 Theatre facilities in Worthing have a Zone 1 market share of almost 75% with Central London being the strongest competitor. Market share for Worthing in Zone 2 is also stronger than any other destination; but falls off considerably in Zone 3 and 4 in favour of Chichester and Horsham as well as Central London. The Theatre Royal in Brighton is the most popular for those living in Zone 5 but Worthing is the second most popular ahead of Central London. An improved theatre/production offer in Worthing would primarily claw back trade from Zone 2, 3 and 4, with a further opportunity in Zone 5 albeit the Theatre Royal in Brighton is likely to remain strong in this part of the catchment.

Family Entertainment

8.25 As in most parts of the UK there are fewer family entertainment venues in the Worthing sub-region, highlighting the longer travel times that people are likely to undertake compared to other leisure activities. The telephone survey has identified the following dominant family entertainment venues in the sub-region (Plan 9):

- **AMF Bowling, Marine Parade, Worthing:** located in the town centre on the sea front, AMF is a 26 Lane Tenpin Bowling venue and restaurant;
- **Bowlplex, Brighton Marina, Brighton:** An out-of-centre tenpin bowling with on-site snack bar, party deals, pool tables and arcade machines;
- **Out of Bounds Angmering:** Located at Rustington Golf Course, Out of Bounds offers adventure golf, tenpin bowling, Clip 'n' Climb, Foot Golf, Soft Play, Laser Tag, Base Camp Café, Parties and Function Room;
- **Worthing Lido, Worthing:** Originally built in 1897 as a band stand, the venue was redeveloped in the late 1950's into an unheated swimming pool and remained the Lido. In 1990, after a period of closure, the venue was re-opened as a family entertainment centre with children's rides, amusements, games and music events in the bandstand;
- **MFA Bowl Chichester:** Located on the out-of-centre Chichester Gate Leisure Park, this venue offers 16 bowling lanes, on-site food, and pool tables/amusements;
- **Windmill entertainment Centre, Littlehampton:** a cinema and theatre venue, but also the adjoins the Harbour Park Amusements and fun fair for families;
- **Horsham Superbowl:** A tenpin bowling and laser quest venue on the edge of Horsham Town Centre;
- **Crawley Leisure Park:** The location of a tenpin bowling alley, cinema, health club and several restaurants including Bella Italia, Chiquito, Frankie & Benny's, Nando's, Pizza Hut, TGI Fridays, and McDonalds.

8.26 AMF Bowling in Worthing is the most commonly cited family entertainment destination in Zone 1 (63.8%) and the full survey area (45.8%). The venue also has a market share in Zone 2 (49.3%), Zone 3 (27.4%), Zone 4 (21%) and Zone 5 (33.6%). Zone 1 residents are also citing Worthing Lido (12.6%), but there is also leakage to Out of Bounds, Angmering (17%) and MFA Bowl Chichester (2.7%).

Figure 8.5: AMF Bowling, Worthing Town Centre [Grafton Site: Area of Change 3]



8.27 Elsewhere within Zones 2-5 the following family entertainment venues are identified as being the most popular:

- **Zone 2:** AMF Bowling Worthing (49.3%) / Out of Bounds Angmering (17.2%) / Bowlplex Brighton (11.8%);
- **Zone 3:** Bowlplex Brighton (28.4%) / AMF Bowling Worthing (27.4%) / Horsham Superbowl (20.5%) / MFA Bowl Chichester (15%);
- **Zone 4:** Bowlplex Brighton (44.3%) / AMF Bowling Worthing (21%) / Horsham Superbowl (20.3%);
- **Zone 5:** Bowlplex Brighton (66.4%) / AMF Bowling Worthing (33.6%).

8.28 AMF Bowling Worthing has a reasonably strong market share across the survey area, and as you would expect, faces the strongest competition from similar facilities in the larger town centres including Brighton, Horsham and Chichester. Out of Bounds is popular but offers a different type of leisure family experience. The objective in Worthing should be to retain this market share through continued investment in and around the AMF Bowling venue.

8.29 We note that there are no more modern luxury 'boutique' bowling venues in the sub-region, such as All Star Lanes. These offer American style venues, higher quality bars, restaurants, karaoke booths and private party rooms. These can often draw customers from wide catchment areas and benefit an area through linked trips to restaurants, bars and hotels. They often sit alongside multiplex venues, and Worthing may wish to consider facilitating the introduction of this type of venue over the plan period.

Museum / Art Galleries

8.30 The majority of respondents to this question cited Central London as their preferred museum destination, with strong market shares across Zones 1-5. Around 66% of respondents in Zone 1 cited venues in Worthing, although this level of influence diminished rapidly beyond the borough boundary. The key competition – albeit relatively limited compared to Central London – includes venues in Littlehampton, Horsham, Hove and Brighton.

Worthing Performance/Need

8.31 Worthing is performing reasonably well in the restaurant and café sector, although the catchment is focused primarily in Core Zone 1. We conclude that there is opportunity to enhance the attraction of Worthing town centre still further to improve market share, frequency of visit and dwell time.

8.32 The two cinemas are performing reasonably well in Core Zone 1, but we have identified an opportunity to improve this type of facility/destination in Worthing to enhance market share throughout Zones 1-5, perhaps through a new multiplex cinema alongside the more historic venues, or high end independent cinema brands such as 'Kino'. The popularity of the Dome has demonstrated that such venues can be viable without the associated car parking, albeit to attract a wider geographical audience and compete with the major venues, car parking and food/beverage

facilities will be important considerations. The introduction of a multiplex cinema would allow for a wider range of titles to be screened; whilst a multiplex would principally be expected to focus on mainstream/'blockbuster' releases, the existing cinemas may be able to diversify their offer to include more specialist independent/arthouse films, thus diversifying the overall offer available to local residents.

- 8.33 The pub market is different to other leisure sectors, with rural towns and villages forming a key part of the equation. Their importance as pub destinations is always likely to be the case, and in the national context of closing venues it is unlikely to be a recommendation for Worthing to target this more traditional market over the plan period. Based on commercial demand and national trends, it would be sensible for Worthing town centre to focus on attracting bars/restaurants that cater for brunch, lunch, dinner and evening drinking visits.
- 8.34 Worthing and Brighton are identified to be the key late night bar/nightclub venues, with Brighton being the stronger destination across the sub-region. We recommend, as a larger town centre, that Worthing encourages this type of attraction, albeit this would depend very much on location and associated amenity issues.
- 8.35 Theatres in Worthing are performing reasonably well in Core Zone 1, although their market share diminishes relatively quickly beyond this tight boundary. Given the historic importance and locally supported facilities, it would be unlikely for Worthing to facilitate a new theatre venue, but an improved production offer would primarily claw back trade from Zone 2, 3 and 4. There is a further claw back opportunity in Zone 5 albeit the Theatre Royal in Brighton is likely to remain strong in this part of the catchment.
- 8.36 AMF Bowling Worthing has a reasonably strong market share across the survey area, and as you would expect, faces the strongest competition from similar facilities in the larger town centres including Brighton, Horsham and Chichester. The objective in Worthing should be to retain this market share through continued investment in and around the AMF Bowling venue, and perhaps consider facilitating a new complementary 'boutique' bowling venues, such as All Star Lanes.
- 8.37 Museum venues were cited by the majority of those living in Core Zone 1, but Central London was the dominant destination across the survey area. There is an opportunity for Worthing to continue to invest and improve upon the existing museum offer to consolidate and enhance market share across the core and peripheral catchment areas. Being a predominantly day-time activity, this leisure activity presents good opportunities for linked trips to town centre shops and food/beverage activities.

Summary

- The leisure assessment has demonstrated that Worthing is performing reasonably well in the café, restaurant, and evening bar/nightclub sectors, but there is considerable room to improve the range, choice and quality of offer and market share. We do not conclude there is a need to enhance the more traditional 'pub' sector, which is a declining sector and more localised in rural towns and villages. Instead, Worthing should focus on improving combined daytime / evening eating and drinking bars/restaurants catering for a range of consumer demands including brunch, lunch, evening meals and evening drinking.
- There is opportunity to enhance the cinema offer in Worthing through the introduction of a new multiplex cinema with associated car parking and food/beverage offer. This should be directed to within or on the edge of the town centre in the first instance. The AMF Bowling is a strong attractor, but there is potential to consider a boutique bowling facility not represented in the sub-region at the current time. Continued investment in theatre performance opportunities and museum venues should continue to be encouraged and facilitated.

9 Boundaries, frontages & policy assessment

9.1 In this section we provide a more detailed assessment of the Council's approach to defining frontages within their centres, considering the appropriateness of the existing Core Strategy proposals map definitions. We also provide guidance on whether the Council's policies in relation to retail and town centres remain fit for purpose for carrying forward into the Council's new Local Plan. This section builds on the policy analysis set out in Section 2 of this report and should be read alongside this. The focus of our analysis is on Worthing town centre, given this centre is expected to see the greatest amount of change over the Council's new Local Plan period, however we also consider the three policy-defined district centres.

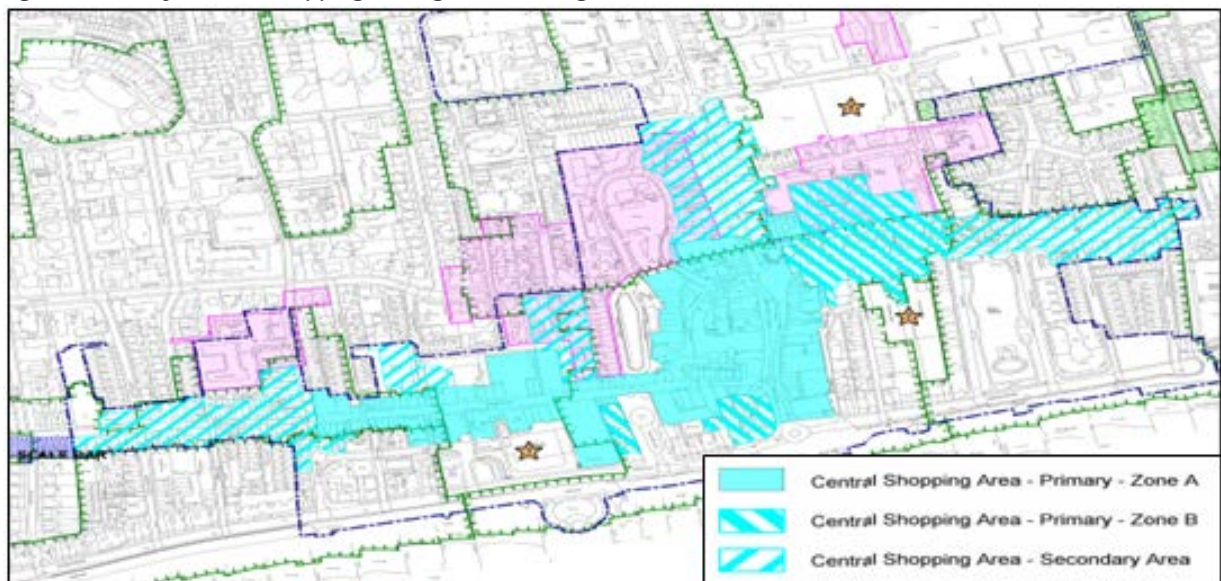
Worthing town centre – existing frontages

9.2 As set out in Section 2, the Core Strategy proposals map defines three types of frontage within Worthing town centre's 'Central Shopping Area': 'Zone A' and 'Zone B' primary shopping frontage, and a secondary shopping area which adjoins the primary shopping frontage in several locations. The Core Strategy confirms the following uses to be acceptable within each area:

- 'Primary Zone A' – exclusively for Class A1 uses;
- 'Primary Zone B' – Class A1, A3 and A4 uses;
- 'Secondary' – Class A1, A2, A3 and A4 uses

9.3 **Figure 9.1** (which reproduces Figure 2.2 from Section 2 of this report) shows the location of the Primary Zone A, Primary Zone B and Secondary frontage in the centre.

Figure 9.1: Policy-defined shopping frontages in Worthing town centre



Source: Worthing Core Strategy April 2011 Proposals Map Inset

9.4 The **Primary Zone A** (PZA) frontage starts at Montague Street, at its junction with West Buildings / Crescent Road. It then stretches eastwards along Montague Street, up to its intersection with South Street. The PZA stretches southwards along South Street up to and including the Iceland store, close to the seafront. It also stretches northwards along South Street, taking in the Montague Centre in its entirety, retail units fronting onto Liverpool Road, and continuing along South Street up to and including the Peacocks store. The Wilko store at the front of the Guildbourne Centre is also included.

9.5 The PZA covers what we would consider to be the 'retail heart' of Worthing. It includes the part of the centre which has the largest-footprint stores (the department stores of Debenhams, Beales, plus large stores such as M&S, H&M, Poundworld Extra (the former BHS), Peacocks, Boots and so on.

- 9.6 The **Primary Zone B (PZB)** frontage abutts the PZA at two locations to the south and one location to the north-east. The two locations to the south of the PZA allocations are:
- The western side of Montague Place, which contains a mixture of retail and service uses, including branches of Costa and Subway, plus a branch of RBS (bank), independent cafes, a hair and beauty salon and so on.
 - Land on the western side of South Street (all units south of Caffè Nero) and the covered Royal Arcade, which is home to a number of small-format shops, cafes, a tanning salon and similar uses.
- 9.7 In addition, the ground floor of the Guildborne Centre, plus the units along the length of Warwick Street are also allocated as PZB.
- 9.8 The **secondary frontage** covers the following areas:
- On the eastern side of the town centre, the PZB allocation along Warwick Street converts to secondary frontage beyond the intersection of High Street / The Steyne. The secondary frontage runs along Brighton Road up to and including its junction with Warwick Place.
 - On the northern side of the town centre, the secondary frontage runs along Chapel Road up to the junction with Ambrose Place (on the western side) and Union Place (on the eastern side)
 - On the western side of the town centre, there is a small area of secondary frontage on Portland Road, up to the junction with Shelley Road, and a further small area on Buckingham Road, covering a pet store and a multi-storey car park.
 - The secondary frontage also extends a significant way westwards along Montague Street, from the western end of the Primary Zone A frontage.

Worthing town centre - amendments to frontages

General recommendations

- 9.9 Having established the key areas of PZA, PZB and Secondary Area frontage within Worthing town centre, in **Table 9.1** we make recommendations where, based on the findings of our assessment of the centre, the current mixture of uses, recent planning permissions and our observations, we consider there may be scope for the Council to consider revisions to its Core Strategy-defined frontages as part of its new Local Plan.
- 9.10 In summary, barring a recommended adjustment to the PZA allocation on the western end of Montague Street (see Table 9.1), we consider the PZA allocation to remain fit for purpose. It is important for a critical mass of floorspace for class A1 retail use to be retained in the centre if Worthing is going to consolidate and improve its comparison goods market share over the course of the new Plan period. As noted above, the PZA contains the town centre's larger-format department and 'anchor' stores; these stores help drive footfall in the centre and act as attractors for other retailers. It is clear that the Core Strategy's approach towards defining a primary shopping area where only class A1 uses are permitted should be carried forward into the new Local Plan.
- 9.11 It is also recommended that, instead of having two primary shopping zones (PZA and PZB), the Council retains the existing PZA allocation as its sole Primary Shopping Area. The currently-defined PZB contains what we could consider to be, in parts, a wider range of uses than might typically be expected in a primary shopping area, and therefore the Council may wish to give consideration to reclassifying PZB (with recommended amendments as set out in Table 9.1) to a new classification of 'Secondary Zone A', with the existing secondary area (with recommended amendments as set out in Table 9.1) then becoming a new classification of 'Secondary Zone B'. 'Secondary Zone A' frontage would be subject to the same restrictions on use as existing PZB frontage, and 'Secondary Zone B' frontage would be subject to the same restrictions as existing secondary frontage.
- 9.12 We are aware that planning permission has been granted for the introduction of a number of new restaurant units into Montague Place, which currently falls within PZA in its entirety. Whilst this change in units is noted, we do not consider there to be merit in reclassifying any of Montague Place. This is because the new restaurant units will be bookended to the north by TK Maxx, one of the largest units in the town centre which acts as an anchor store, and to the south by a number of other retail uses including stores currently occupied by HMV and Game. It is considered that the retention of larger units such as TK Maxx within the PZA is important for the town centre's retail circuit. Therefore rather than 'cutting in' to the PZA allocation it is considered that a more sensible approach would be to retain the whole of Montague Place as PZA. However if there is further loss of retail units in this area to other town centre uses over the course of the new Local Plan period, the Council should undertake a further review of this allocation.

- 9.13 It is recommended that the Lidl and Waitrose stores on the edge of the town centre continue to remain outside the defined PZA and Secondary frontages. Whilst these stores are within walking distance of the centre, and are likely to account for some 'linked trips' with users of the town centre, both are detached from the rest of the retail and other 'main town centre uses' offer, and there are a number of non-retail uses between the two stores and the existing frontages which limit footfall from the existing frontages to the stores.
- 9.14 Finally, it is recommended that the Council review its defined frontages at regular intervals throughout its new Local Plan period. This is because:
- As this study has identified, the role and function of town centres has changed significantly in recent years, as a result of changes on consumers' shopping behaviour and wider market trends. It will be important for the town centre to be responsive to any future changes in behaviour and trends.
 - There are three opportunity sites in the town centre, at least one of which we would expect to contain a quantum of retail floorspace if it comes forward for redevelopment. Depending on the nature and amount of floorspace which comes forward, this new development may result in the 'centre of gravity' of the town centre altering, which may in turn require reconsideration of the frontages set out above.

Location-specific recommendations

- 9.15 Having set out the general approach which the Council should take in respect of definition of primary and secondary shopping frontage in Worthing town centre, below (Table 9.1) we identify five location-specific amendments to frontages which the Council may wish to consider taking forward into their new Local Plan. The recommendations are also shown mapped at Figure 9.2.

Table 9.1: Recommended alterations to frontages in Worthing town centre

Map ref (see Fig 9.2)	Suggested alteration	Justification
Location-specific recommendations		
1	Contract western boundary of Primary Zone A frontage to junction of Montague Street / Buckingham Road (north side) and up to including Poundland store at 105-109 Montague Street (south side)	<p>The range of uses along 80-108 (inclusive) and 111-135 Montague Street (south side) are not aligned with the Council's policy aspiration for PZA frontage to be principally occupied by class A1 retail uses. The range of uses along this stretch of Montague Street includes a number of cafés, financial services, a hairdressers, plus lower-quality retail uses including four charity shops. Footfall along this stretch of Montague Street was also observed to be lower than elsewhere in the PZA.</p> <p>Notwithstanding the presence of the larger unit occupied by Collingwood Batchellor furniture store at the western end of the current PZA allocation, we consider there to be merit in reclassifying this stretch of Montague Street as SZA frontage, to better reflect the range of uses in the area and its position away from the key retail anchor stores.</p> <p>The Poundland unit at 105-109 Montague Street is considered to represent the western-most 'anchor' store to the retail offer in the town centre and should accordingly be retained within PZA.</p>
2	Remove Secondary frontage allocation at Buckingham Road (west side)	<p>The Secondary frontage allocation on the western side of Buckingham Road should be removed; the site is currently utilised as a business services unit on the ground floor, and car park on upper levels. Freeing up this site from a frontage allocation presents an opportunity for redevelopment in the medium to longer-term, as it is not considered the site makes a particularly active contribution to the vitality and viability of the town centre. The retail unit on the eastern side of Buckingham Road (most recently used as a pet goods store) should be retained as secondary frontage as it represents a relatively modern, good-sized retail unit.</p>
3	Extend secondary shopping frontage on Rowlands Road	<p>On the north side of Rowlands Road, the boundary should also be extended to incorporate the Gala Bingo unit, as bingo halls are classified as a 'main town centre use' under Annex 2 of the NPPF.</p>
4	Review boundaries of Worthing town centre secondary frontage / Rowlands Road neighbourhood centre	<p>The Secondary Frontage allocation to the west of the town centre currently runs as far as the Co-Op supermarket at the junction of Rowlands Road / Eriswell Road (north side) and up numbers 1-21 (inclusive) Rowlands Road (south side). Beyond this, the policy boundary of Rowlands Road neighbourhood centre then immediately commences, running westwards to the junction with Heene Road, where the</p>

		<p>neighbourhood centre continues a short distance southwards.</p> <p>Although the NPPF does not provide a definition of what constitutes a 'neighbourhood centre' we would consider that some of the uses in this area are more aligned to the higher order function of Worthing town centre than the neighbourhood centre of Rowlands Road. This is particularly applicable to the parade of units at 61-79 Rowlands Road, which includes a number of specialist retail units and an art gallery.</p> <p>The parade of units at 61-79 Rowlands Road also benefits from a particularly strong environmental quality, with attractive buildings and well-maintained frontages throughout. These units act as strong 'gateway' arrival into the town centre when approaching from the west and the Council may wish to consider reallocating this stretch of units away from Rowlands Road neighbourhood centre, and into the SZB frontage of Worthing town centre. This allocation should also be extended to include the two units on Rowlands Road between its junctions with Milton Road and Wordsworth Road.</p> <p>Whilst there is slight disconnection of active frontages along Rowlands Road on account of the presence of a community centre and an Action for Hearing Loss centre, on balance we consider this to be outweighed by the merits of including the remaining units along the south side of Rowlands Road into SZB frontage.</p> <p>Between Wordsworth Road and Heene Place there is a gap in the active frontages. Beyond this, west of Heene Place, the offer becomes more orientated towards neighbourhood centre uses, including a laundrette, pharmacy, and small branches of McColls and Spar supermarkets on Heene Road (alongside a handful of more specialist uses such as an antiques shop). It is recommended that this area continues to form a separately-defined centre in policy terms, as Rowlands Road neighbourhood centre, as the range of uses would principally be expected to cater towards the local residential population (see detail plan at Figure 9.3).</p>
5	Extend secondary shopping frontage on Chapel Road to include Connaught Cinema	Cinemas and theatres are classified as a 'main town centre use' under Annex 2 to the NPPF. Our assessment has also identified that this facility makes an important contribution to the wider vitality and viability of the town centre and therefore should be afforded appropriate protection.
General recommendations		
-	<p>Reclassify existing Primary Zone B frontage as Secondary Zone A frontage.</p> <p>Reclassify existing Secondary frontage as Secondary Zone B frontage.</p>	<p>Alongside the other recommendations set out in this table, the Council may wish to consider reclassifying the titles of its policy definitions in order to provide greater clarity that a broad range of uses can be supported in non-PZA frontage areas.</p> <p>'Secondary Zone A' frontage would be subject to the same restrictions on use as existing PZB frontage, and 'Secondary Zone B' frontage would be subject to the same restrictions as existing Secondary frontage.</p>

Figure 9.2: Recommended alterations to frontages in Worthing town centre

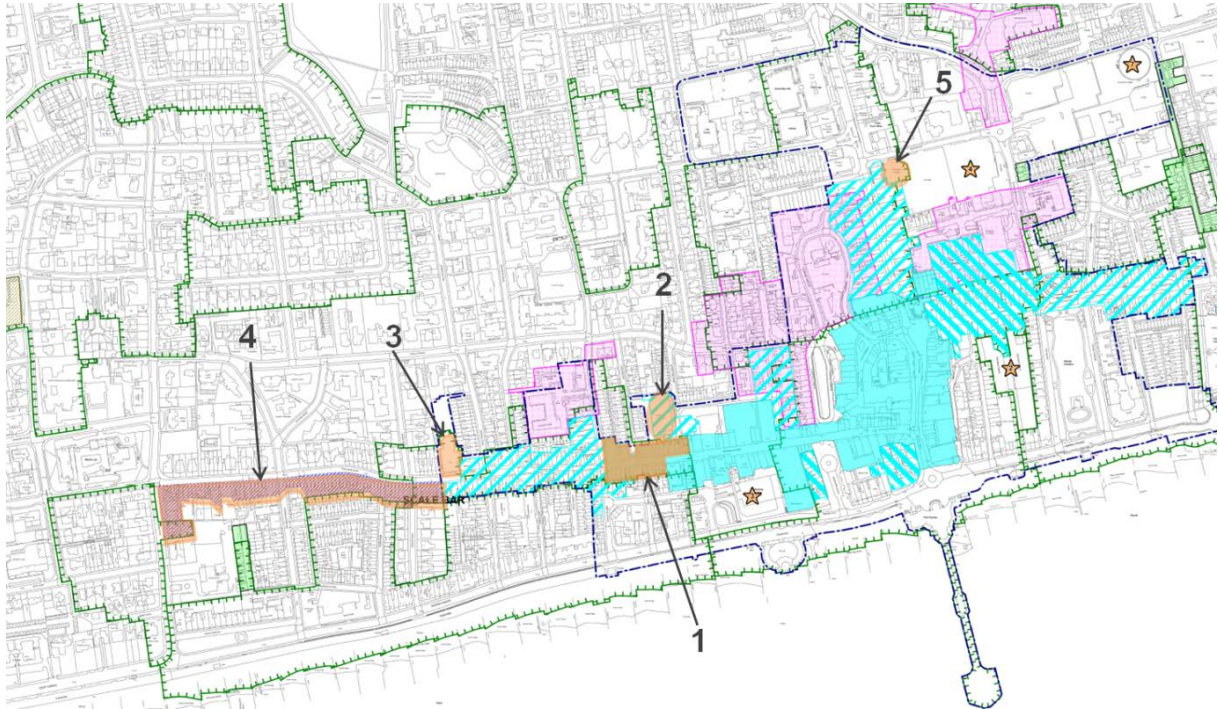
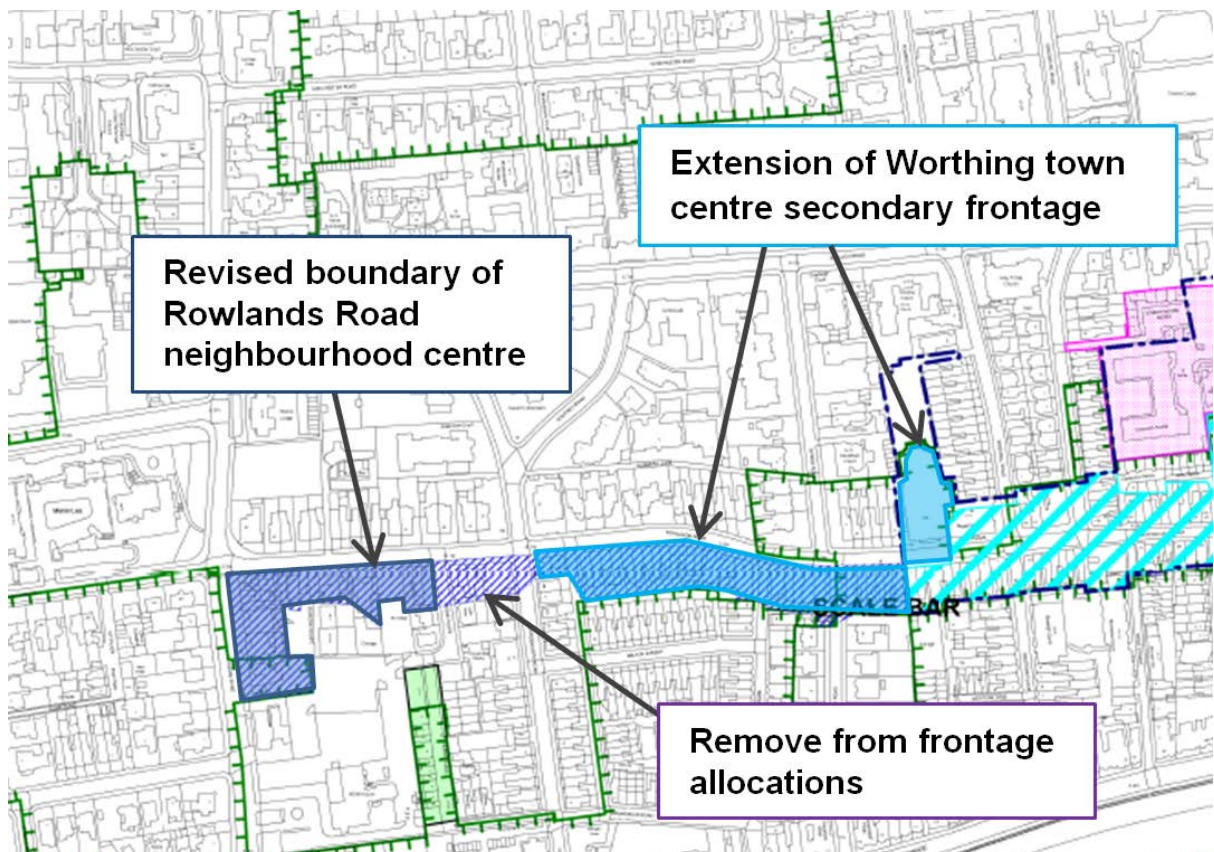


Figure 9.3: Detail of recommended alterations to frontages on Rowlands Road, Worthing



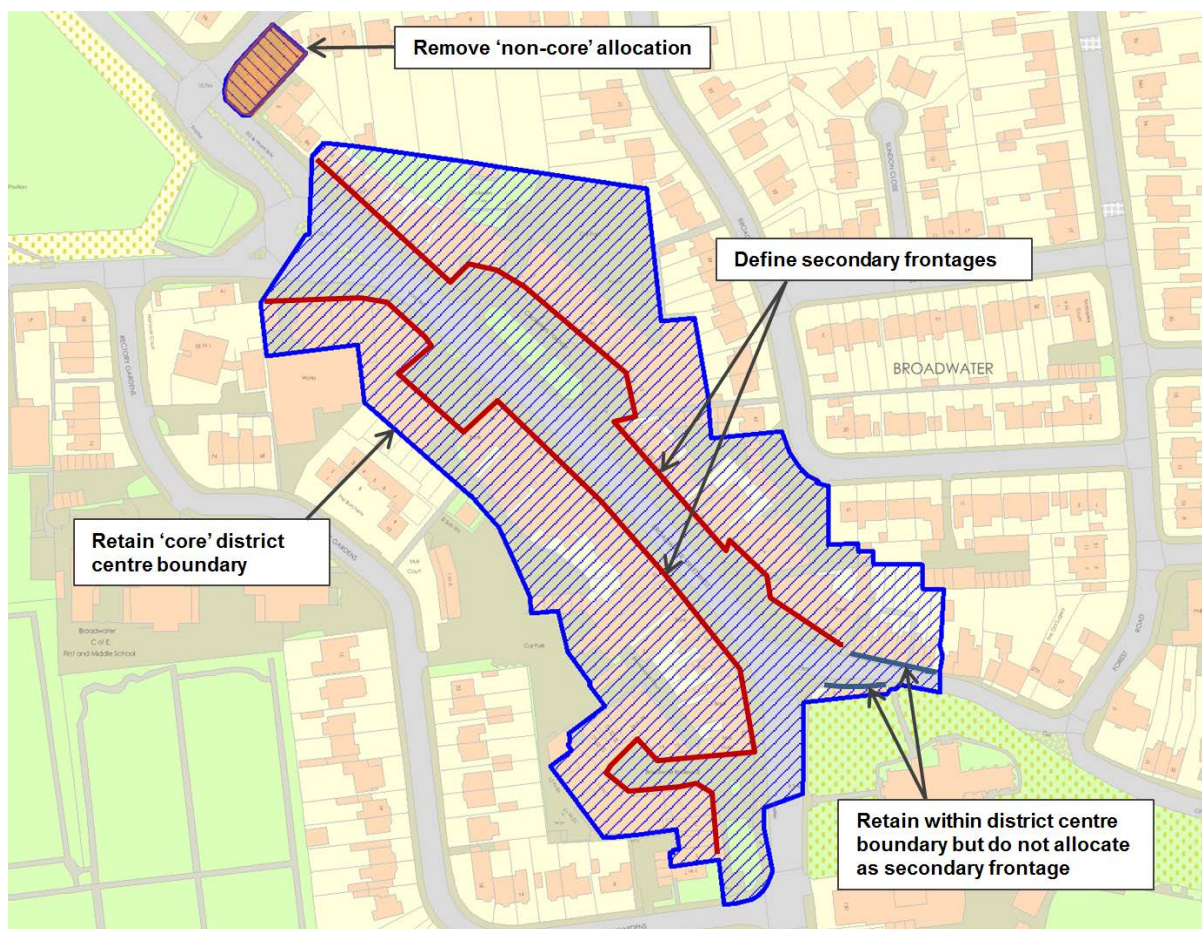
District centres

- 9.16 The three district centres of Broadwater, Goring and West Durrington which this study has considered each have defined boundaries on the Council's adopted Core Strategy proposals map. Broadwater and Goring both have defined areas of 'core' and 'non-core' uses, which are definitions based on 'saved' policies carried over from the Council's Local Plan (adopted in 2003).

Broadwater

- 9.17 The defined boundary of Broadwater district centre runs northwest-southeast along Broadwater Street West, from its junction with Arshdeal Road to the north, up to and including the purpose-built Broadwater Boulevard centre to the south, which includes the recently-opened medical centre and pharmacy. The centre also extends a short distance along Broadwater Street East, including a number non-retail uses on the north side of the street. A separate area at the very north of the centre, at the junction of Broadwater Street West and Cissbury Road, which is currently occupied by a funeral parlour, is currently classified as ‘non-core’.
- 9.18 The overall boundary of the district centre remains, in our view, largely fit for purpose, and reflective of the current extent of the retail and main town centre uses within the centre. We consider there is scope for a minor amendment to the boundary of the centre — this relates to the aforementioned funeral parlour, which is disconnected from the rest of the offer in the centre and does not particularly contribute to its overall offer.
- 9.19 The Council should define secondary shopping frontage throughout the centre, reflecting the requirements of the NPPF. This should reflect the existing distribution of units in the centre. However, we consider the frontage should be curtailed on Broadwater Street East up to and including the unit currently occupied by Natwest. The units east and south of this on Broadwater Street East are a mixture of commercial and residential, and whilst given some retail uses remain this area should be retained within the district centre boundary, it is not considered that the units necessarily require policy protection and loss to other uses would likely be acceptable without any adverse impact arising on the overall vitality and viability of the district centre.
- 9.20 A summary of the recommended changes to the boundaries and frontages in the centre is shown in **Figure 9.4**.

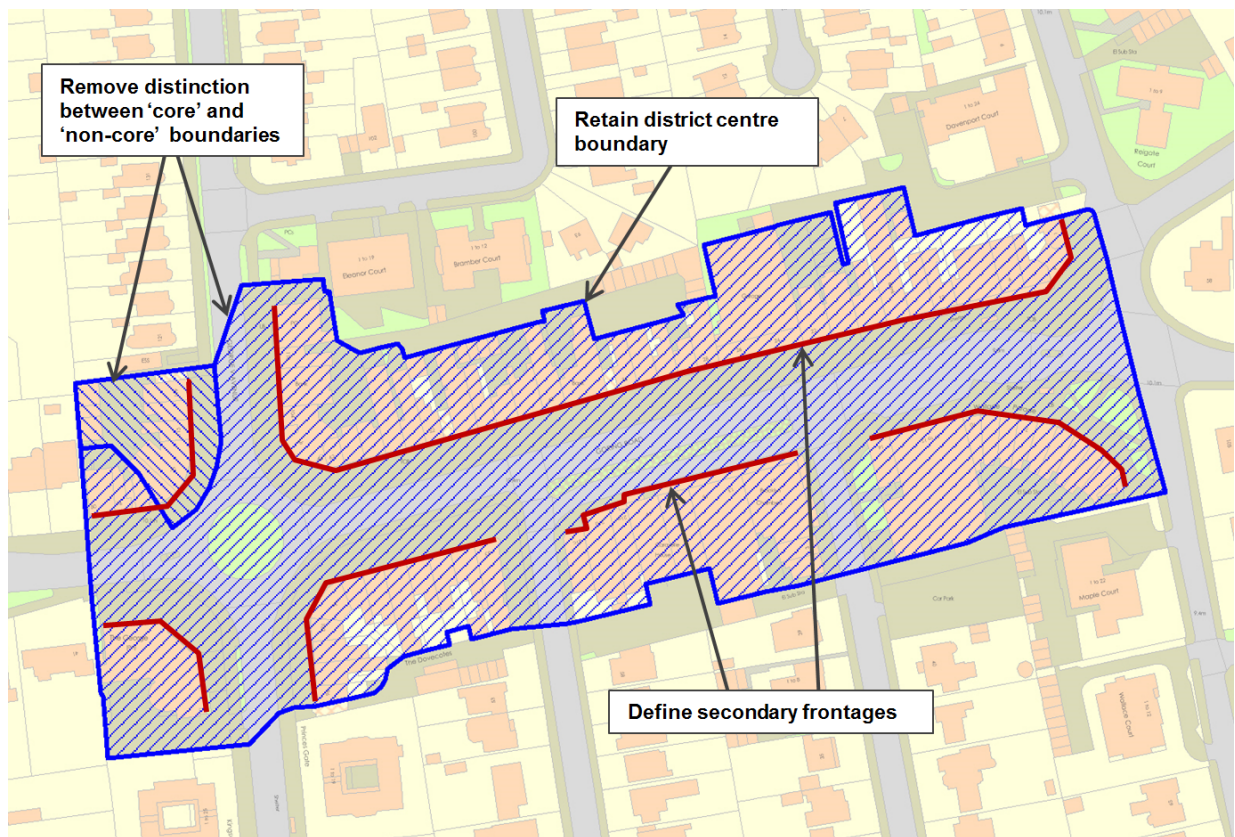
Figure 9.4: Detail of recommended alterations to frontages/boundaries, Broadwater



Goring

- 9.21 Goring district centre is centred around a shopping parade along the A259 Goring Road, between the junctions with George V Avenue and Elm Grove. The Toby Carvery pub/restaurant and small parade of units on the western side of George V Avenue are also included in the boundary of the centre. The boundary of the district centre (**Figure 9.5**) accurately reflects the extent of commercial activity in the centre; there are no instances where expansion or contraction of the centre boundary are considered necessary. In common with the approach to Broadwater set out above, it is recommended that the Council define the entirety of the active frontage in Goring district centre as secondary shopping frontage, in order to ensure that the centre retains a healthy mix of uses over the course of the new Local Plan period. The recommended secondary frontages are shown mapped on Figure 9.5.
- 9.22 Reflecting a historical Local Plan allocation, a small area of the western part of the centre (west of George V Avenue, north of Goring Road) is allocated as 'non-core' district centre. It is recommended that this area be incorporated as part of the overall district centre boundary and its units allocated as secondary frontage.

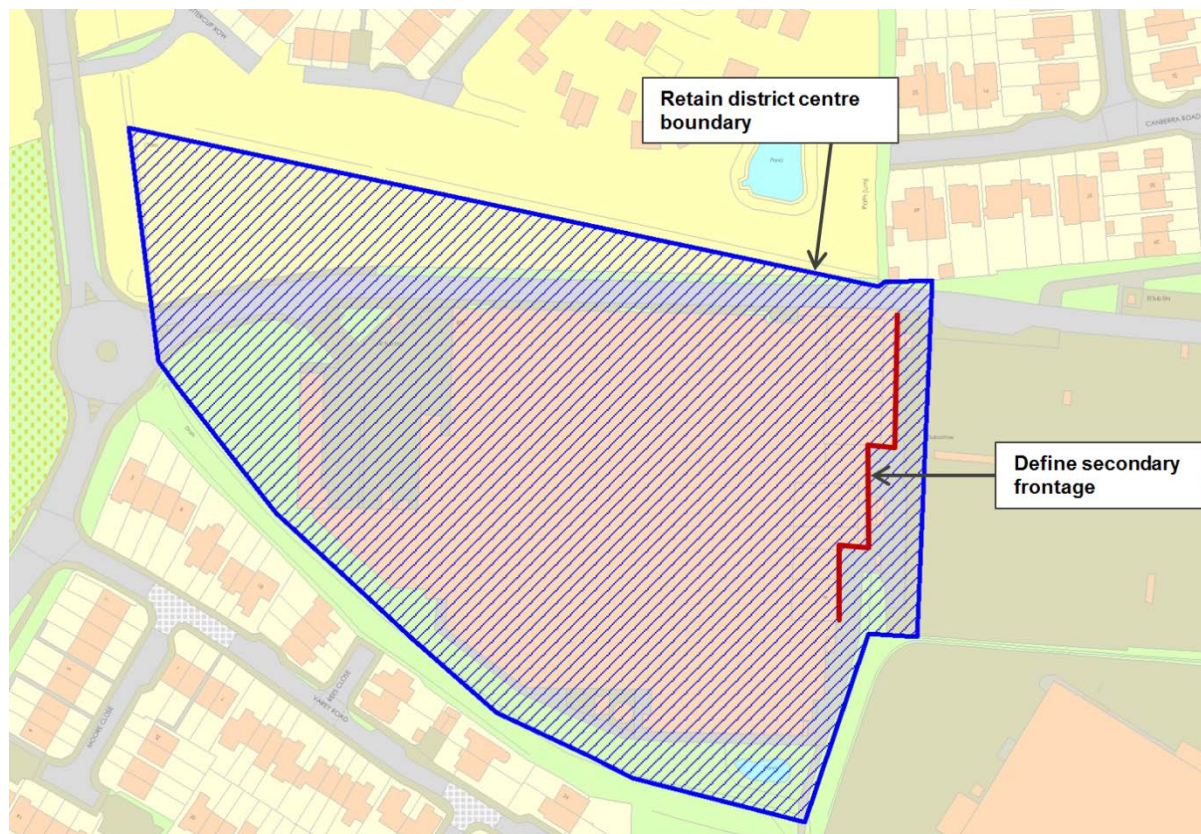
Figure 9.5: Detail of recommended alterations to frontages/boundaries, Goring



West Durrington

- 9.23 The district centre at West Durrington comprises the Tesco Extra supermarket and a number of other smaller units which run along its frontage. Reflecting the approach applied to Broadwater and Goring, it is recommended that this parade of units (including the entrance to the Tesco store) is defined as secondary frontage. The boundary of the district centre should be retained to cover the store and incorporated smaller units (**Figure 9.6**).

Figure 9.6: Detail of recommended alterations to frontages, West Durrington



Core Strategy policy analysis

- 9.24 The Council's current approach to planning for new retail development is set out at Policy 6 of the Council's adopted Core Strategy, with supporting text discussing in more detail the amount of new retail floorspace which the Council should plan for (based on the findings of the Council's previous retail evidence base study).
- 9.25 It is recommended that the Council carry forward a similar policy to Core Strategy Policy 6 in their new Local Plan, in order to guide the future development of its network of town, district and local centres. The new policy will need to be fully reflective of the aims and objectives and policy approach to retail and town centre uses set out in the NPPF (which was published in 2012 and thus post-dates the existing Core Strategy policy). In Figure 9.7 we set out an annotated version of Core Strategy Policy 6, identifying a number of adjustments to the wording of the text and overall policy approach which the Council may wish to consider.

Figure 9.7: Recommended alterations to Core Strategy Policy 6

Policy 6

Retail

The Council will work with organisations and the local community to identify, protect and enhance the following hierarchy of vital and viable town, district and local centres:

Town Centre	To ensure that Worthing town centre continues to fulfill its sub-regional role, it is important to provide development that meets both quantitative and qualitative needs. New retail, leisure and office development will therefore, be directed to the town centre, although a significant amount of office development is expected to be out-of-centre.	
District Centres	<i>Broadwater/Goring Road/West Durrington:</i> Development required to meet the needs of the area served by the centre, is of a scale appropriate to the centre and will not adversely impact on the vitality or viability of other nearby centres will be allowed.	A
Local Centres	Medium-scale local centres: <i>Findon Valley/Tarring Road/South Farm Road/The Strand/Thomas A. Beckett/Ham Road/Rowlands Road/The Mulberry.</i> Small-scale local centres: <i>Aldsworth Parade/Boxgrove/Broadwater Street East/Limbrick Corner/Lyndhurst Road/Manor Parade/Selden Parade/Alinora Crescent/Broadwater Road/Salvington Road/South Farm Road (North)/South Street Tarring/Brighton Road/Dominion Road/Downlands Parade</i> No proposed development will be allowed within these centres, unless it can be demonstrated that it is to meet local needs, is of a scale appropriate to the centre and will not adversely impact upon the vitality or viability of other nearby centres.	B

This will be achieved through:

- Developing the town centre and creating a new retail core by redeveloping the Guildbourne Centre and incorporating additional retail space in Union Place (Union Place Area of Change)
- Identifying Primary and Secondary Shopping Zones where Secondary zones are more flexible and encourage retail, commercial, leisure and cultural development. Primary Shopping Zones are divided into A and B where Primary Zone A protects A1 uses and Primary Zone B allows a more flexible approach to A3/A4 uses
- Safeguarding the retail character and function of the town centre by resisting developments that detract from their vitality and viability
- Applying the sequential approach when considering proposals for new out-of-town uses
- Encouraging convenient and accessible district and local shopping facilities to meet day to day needs of residents, and contribute to social inclusion.

9.26 The recommended adjustments to the policy wording can be summarised as follows:

- General point:** It is recommended that the Council incorporate the quantitative retail capacity figures which this study has identified into the policy wording. It is also recommended that the policy is named 'retail and other main town centre uses'. A definition of 'main town centre uses' will need to be set out, reflecting that of Annex 2 of the NPPF.
- District centres (annotation A):** Under the NPPF, there is no requirement for applications which fall within a defined centre to demonstrate that no impact would arise on the vitality and viability of other centres. The text should be revised to read: 'Development in district centres will be supported provided it is of a scale appropriate to the role and function of the district centre'. The Council may also wish to identify restrictions on the range of uses which will be supported within the defined frontages in the centre, in line with recommendations elsewhere in this report.
- Local centres (annotation B):** As above, the NPPF does not require applications which fall within a defined 'town centre' to demonstrate that no impact will arise on the vitality and viability of other centres. It is recommended that the text accompanying the local centres definition states that 'Development in local centres will be supported provided it is appropriate to the role and function of the local centre.' The Council may also wish to state that applications which seek to rectify local gaps in provision in respect of retail and day-to-day services will be supported in principle.
- Primary and Secondary frontages (annotation C):** The Council may wish to update the wording of this to reflect the recommendations made previously in this section.
- Sequential approach (annotation D):** Reference should also be made to the requirement of paragraph 26 of the NPPF for applications which are not within a defined frontage to demonstrate compliance with the 'impact test'.

- **Encouraging convenient and accessible district and local shopping facilities (annotation E):** Clarification should be provided on how the Council plans to achieve this. Does it involve, for example, improving residents' access to existing district and local centres, or the delivery of new district/local shopping facilities. The highlighted statement would benefit from a greater level of clarity.

Local Plan 'saved policies' analysis

9.27 Appendix 6 to the adopted Core Strategy identifies that four policies from the Worthing Local Plan (adopted 2003) in respect of retail and town centre uses have been 'saved' and therefore continue to form part of the development plan. These are:

- **Local Plan Policy S10**, which relates to ground floor uses in the Secondary Area in Worthing town centre;
- **Local Plan Policy S11**, which relates to ground floor uses in 'core areas' in district and neighbourhood centres;
- **Local Plan Policy S12**, which relates to ground floor uses in 'non-core' areas in district and neighbourhood centres;
- **Local Plan Policy S13**, which relates to ground floor uses in local shopping parades

9.28 We provide a brief review of the robustness and continued relevance of these policies in respect of the Council's future approach to development management below.

Policy S10

9.29 It is considered that this policy to an extent duplicates the approach set out in Core Strategy Policy S6 (reviewed above), and we refer to our recommendations made above in respect of the definition of the Secondary frontage area in Worthing town centre and the range of uses permissible within this.

Policies S11 and S12

9.30 The Council's Core Strategy does not contain any specific guidance regarding the range of uses which will be permitted in the Council's network of district centres. Core Strategy Policy 6 states that development will be allowed in district centres which is 'required to meet the needs of the area served by the centre, is of a scale appropriate to the centre and will not adversely impact on the vitality and viability of other nearby centres will be allowed'. As an overall policy approach, we consider this to be sensible and should be carried forward into the Council's new Local Plan. However as noted above we would advise that there is no requirement for development of main town centre uses which are in-centre locations to demonstrate that there will no adverse impact on the vitality and viability of other nearby centres.

9.31 Specific policy guidance on the range of uses which could be supported was previously set out in the Council's Local Plan, under Policies S11 and S12, as shown below. Appendix 6 to the Core Strategy confirms that these policies remain 'saved' and therefore continue to form part of the development plan. It is considered that they form a useful basis on which the Council may wish to consider a future policy approach towards their district centres.

9.32 An extract of Policies S11 and S12 are shown below.

POLICY S11

Within the retail core of the district and neighbourhood shopping centres, the change of use of ground floors from a shop (A1) to other uses will not normally be permitted. Exceptions may be granted where:

- (i) the use is an A2 or A3 use; and
- (ii) the proposal causes no significant adverse effects for the occupiers of neighbouring properties; and
- (iii) the proposal does not intensify car parking problems; and
- (iv) the use does not extend or result in a block of non-retail uses with a frontage of more than 20 metres or result in the proportion of non-shop uses within the retail core exceeding 35%.

Proposals for uses outside the A1, A2 or A3 Use Classes will not normally be permitted within the retail core of these centres. However, other uses which would enhance the vitality and viability of a shopping centre may be permitted.

POLICY S12

Within the district and neighbourhood shopping centres, outside the defined retail cores, changes of use will normally only be permitted, provided that:-

- (i) the use proposed is a social or community use and complies with Policy SC1; or is an A1, A2 or A3 use;
- (ii) the proposal causes no significant adverse effects for the occupiers of neighbouring properties;
- (iii) the proposal does not intensify car parking problems.

- 9.33 Local Plan Policy S11 does not permit more than 35% of units within the defined district centres to be used for non-class A1 retail uses. In light of the changing role and function of many centres, as this report has identified, the Council may wish to consider increasing this threshold to 40%. This report has demonstrated that non-retail uses such as cafes and restaurants can make an important contribution to the overall vitality and viability of centres, adding diversity and footfall and encouraging linked trips, and therefore a greater tolerance of these type of uses within the district centres may be beneficial. The Council has already trialled this more flexible approach in part of Broadwater District Centre with a positive result arising in terms of letting of vacant units and an introduction of a broader range of uses into the centre and it is considered this approach could be extended to each of the three district centres considered by this study.
- 9.34 However, whilst a slightly more flexible approach than previously undertaken may be beneficial, in order to ensure that the Council's network of district centres are still able to respond to local residents' day-to-day shopping needs, and to continue to encourage sustainable patterns of shopping across the Borough, we would not recommend increasing the threshold above 40% as a general rule. This will ensure that the core function of the district centres as locations for everyday convenience and comparison goods shopping is protected, but also allows for a potentially broader range of complementary supporting uses to be accommodated.
- 9.35 As we have set out above, it is recommended that the entirety of the district centres at Broadwater, Goring and West Durrington is classified as secondary frontage, having regard to the recommended amendments to the boundaries set out above. It is recommended that within these frontages, the Council continue to seek to deliver only class A1, A2 and A3 uses, and class A4 and A5 uses should generally be resisted.
- 9.36 It is therefore recommended that for the district centres at Broadwater, Goring and West Durrington, the Council's development management policy approach should:
- Allocate secondary shopping frontage where appropriate in the district centres (see Figures 9.4, 9.5 and 9.6);
 - Retain the current district centre boundaries, with the exception of:
 - Broadwater: remove the non-core retail area (as defined on the Core Strategy proposals map) from the centre boundary;
 - Goring: retain the non-core retail area (as defined on the Core Strategy proposals map) within the overall district centre boundary, and define as secondary frontage in line with the rest of the centre.
 - Permit changes of use from class A1 retail to class A2 or class A3 uses*, providing that class A2 and A3 uses combined do not account for more than 50% of all units in the centre;
 - Enable the introduction of new class A1, A2 or A3 of an appropriate scale to the role and function of the centre*;
 - Consider applications for other 'main town centre uses' of an appropriate scale within the defined district centres on their individual merits;
- (*) should be subject to considerations of residential amenity and parking, as per the approach in Local Plan Policies S11 and S12.*

Policy S13

- 9.37 'Saved' Local Plan policy S13 states that changes of use from class A1 to another use within defined local shopping parades will be resisted, unless the proposal is for class A2 or A3 use; and unless it causes no significant adverse effects for the occupiers of neighbouring properties; provided it does not intensify car parking problems; and provided the loss of a class A1 retail outlet will not cause harm to the function of the parade as a local shopping facility. We consider that this represents a robust development management approach to apply to the Council's network of local centres moving forward, when considered alongside the overall approach to development as currently set out in Core Strategy Policy 6.
- 9.38 It is considered that the Council should consider the following policy approaches to the district centres:
- Permit changes of use from class A1 retail to class A2 or class A3 uses*, providing that it will not cause harm to the function of the centre's ability to meet day-to-day shopping needs;
 - Enable the introduction of new class A1, A2 or A3 of an appropriate scale to the role and function of the centre*;
 - Resist applications for other 'main town centre uses' when they are not appropriate to the role and function of the centre;

() should be subject to considerations of residential amenity and parking, as per the approach in Local Plan Policies S11 and S12.*

10 Conclusions & recommendations

- 10.1 Drawing on previous sections, including our qualitative and quantitative overview, this section sets out the key conclusions arising from our analysis, considers the scope to accommodate new retail/leisure development in the borough, and identifies the opportunity for wider town centre strategies to facilitate improvements in performance.
- 10.2 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should support the vitality and viability of town centres, and allocate a range of suitable sites to meet the scale and type of retail development needed in town centres. This section addresses these requirements and makes recommendations to provide the Council with up to date evidence to prepare suitable strategies for their network of centres.

Policy/Market Context

- 10.3 The NPPF clearly advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA's to positively seek opportunities to meet the development needs of their area. Where physical capacity is not present in a town centre to meet the level of 'need' identified, local authorities are encouraged to find the most appropriate alternative strategy having regard to the sequential and impact test.
- 10.4 In terms of the market, the period between 2013 and 2016 experienced 'exceptional buoyancy' in consumer spending, albeit this has largely been driven by the low value of goods, heavy discounting and persistent deflation of goods prices. Current forecasts note that economic growth will remain tentative over the plan period, particularly in the short to medium term, with consumer confidence likely to be challenged by a range of factors including the by the UK to leave the EU.
- 10.5 Challenges from competition posed by the internet, multi-channel retailing and out-of-centre developments will continue, and town centres need to have a compelling, diverse offer in order to effectively compete. In a positive 'twist', however, click and collect is now one of the most significant drivers of growth, with evidence demonstrating that these customers visit centres more frequently and make additional purchases whilst in the shop/town. The phenomenon is driving an increase in footfall in our town centres, an outcome being felt by the high street already.
- 10.6 Nevertheless, town centre strategies which support the continued evolution of the high street must continue to be prioritised. This should involve providing a high quality shopping 'experience', maximising the benefits of tourist trade/leisure market, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- 10.7 It will important for centres like Worthing to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail/leisure offer from other centres. The on-going pattern of operator polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services. The Council's Investment Prospectus (published in 2016) will therefore be an important tool in helping to sell the offer of Worthing to potential investors. The Investment Prospectus clearly articulates the Council's vision for each of the opportunity sites in Worthing town centre.

Worthing Town Centre

Catchment Area/Market Share

- 10.8 Worthing town centre is identified by this study to be performing adequately, but substantial opportunity has been identified to transform Worthing to take a step change upwards in terms of the centre's attraction and competitiveness. Worthing is the most influential town centre across the survey area which we have used to inform this study (see **Figure 7.1** for a plan showing the extent of this survey area), achieving a market share for comparison goods (non-food) shopping of 24.3% from the five-zone survey area. In terms of competition, 'leakage' of comparison goods market share from each of the five survey zones has been identified, chiefly to Brighton and the Holmbush Centre in Shoreham to the east, plus Horsham to the north and Chichester to the west.
- 10.9 Within Zone 1, Worthing has a comparison goods market share of 44.7%, and this can be considered to be Worthing's 'core catchment'. The market share attracted to Worthing 'tails off' markedly beyond this core catchment however:
- Zone 2: 30.3% market share;

- Zone 3: 12.6% market share;
- Zone 4: 9.7% market share;
- Zone 5: 2.8% market share.

10.10 Whilst competition is strong given the scale and high quality nature of the three main competing centres, there is opportunity to consolidate Worthing's positioning and increase market share in each of the five survey zones. The town centre will need to start offering a broader town centre mix — an approach which its competing centres have successfully adopted — whilst continuing to invest in the environment, and capitalising on its points of differentiation and seafront asset.

10.11 This is ever more urgent in the context of continued investment and change in the competing centres including, for example, proposals for additional retail floorspace at Preston Barracks and Brighton Marina, and major redevelopment to include residential, retail and leisure uses at Southern Gateway in Chichester. Horsham is set to improve over the plan period through an extension to the Swan Walk shopping centre (to incorporate a new flagship unit), a new multiplex cinema, and the redevelopment of Pirie's Place to include a possible new 'boutique-style' cinema operator (e.g. Everyman Cinema).

Comparison Goods

10.12 As you would expect from a sub-regional centre, the number of comparison units is above the national average. A closer qualitative analysis identifies, however, that the proportion of clothing/footwear operators is acknowledged to be low, and below national average in some categories. The quality, choice and range of clothing/footwear operators is weak, and rather than attracting new retailers, Worthing has recently lost both BHS and Next from its town centre. The highest quality of clothing and footwear retailers in Worthing town centre is currently mid-range including, for example, Top Shop, H&M, New Look, River Island, Clarks and Monsoon/Accessorize, and whilst these act as important attractors and drivers of footfall, there is a need for a broader, higher quality comparison goods offer in the town centre.

10.13 The three main competing town centres of Brighton, Horsham and Chichester have a superior offer in this respect, offering a stronger choice and substantially higher quality of operator, located in attractive environments. Operators here, that Worthing should aspire to attract, include East, Jigsaw, Hobbs, French Connection, White Stuff, Fat Face, Cath Kidston, Joules and Phase Eight, for example. Many of these will only operate within a critical mass, i.e. aside other similar operators, but some – including Fat Face and White Stuff, for example, will trade independently. If Worthing is to take a step change in quality it must start aspiring to representation from some or all of these operators. In an increasingly affluent catchment with a seaside location this is not unachievable over the plan period – provided the right strategy is put in place.

Convenience Goods

10.14 The convenience goods offer in Worthing town centre – in terms of number of units and floorspace – is below national average (even when the edge-of-centre Waitrose is included in the statistics). There are four small scale top-up foodstores in the Primary Shopping Area which primarily cater for 'passing trade', namely Iceland, Tesco Express, M&S Simply Food and Co-Op. These support the main comparison goods shopping function of the town centre and cater for passing trade rather than driving trips independently. This is not necessarily a cause for concern, but a convenience goods shopping function should continue to be encouraged and retained in the Primary Shopping Area.

10.15 On the 'edge' of the town centre, Lidl and Waitrose are located on adjacent sites and provide two good performing foodstores with store dedicated car parks. In qualitative terms, we conclude that there is 'room' for a further town/edge-of-centre foodstore, albeit any proposals must be underpinned by strong connectivity and linkages with the main shopping area so as to benefit from linked trips and footfall with the town centre. This would meet the objective of national policy to support the vitality and viability of the town centre.

Leisure Sector

10.16 The leisure sector (in terms of number of units) is above national average in most categories based on analysis undertaken by Experian Goad, albeit the quality and scale largely falls short of competing destinations and levels expected in a sub-regional town centre. Market share is reasonably strong, but there is substantial opportunity to enhance this type of visit to Worthing still further. The importance of locating this type of commercial development in or on the edge of the town centre – thus encouraging connectivity and linked trips – should not be underestimated and should form the core of any site/town centre strategy.

- 10.17 The leisure assessment in this study has demonstrated that Worthing is performing reasonably well in the café, restaurant and evening bar/nightclub sectors, and that the café culture has improved in quality in the last year or two. Nevertheless, there is considerable room for improvement to the range, choice and quality of offer in order to achieve a stronger catchment market share. This in turn drives increased frequency of visit and extended dwell times, to the benefit of the town centre as a whole. With regards to its food and drink offer, Worthing should focus on improving both the quality and range of its food and drink venues. This particularly applies to improving the offer of combined daytime/evening eating and drinking cafes, bars and restaurants which cater for a range of consumer demands including brunch, lunch, afternoon tea, evening meals and evening drinking. These types of facilities serve to add vibrancy to the centre throughout shop opening hours as well as into the 'twilight' period between when retail outlets close and when the night-time economy venues come into their own.
- 10.18 In terms of the other commercial leisure uses, Worthing offers a good range of facilities and achieves a reasonable market share, but there is much 'leakage' of market share of this type of activity to competing destinations. Cinema trips are drawn to major multiplex venues at Chichester Gate (Cineworld), Crawley Leisure Park (Cineworld) and Brighton Marina (Cineworld) and Brighton Town Centre (Odeon); whilst in Zone 1 residents primarily visit the Dome in Worthing, many choose the Cineworld at Chichester and the Cineworld at Brighton Marina, both of which are some distance away. An enhanced cinema offer in Worthing town centre would therefore be expected to 'claw back' some of this lost market share.
- 10.19 These competing commercial cinema/leisure destinations also offer a wide range of associated eating/drinking venues characteristic of leisure park venues, including for example, Pizza Hut, Bella Italia, Nando's, Las Iguanas, TGI Friday's and Chiquito's. Both Chichester Gate and Crawley also offer large free car parks, perhaps underpinning the reason behind Zone 1 residents to Chichester Gate rather than Brighton Marina (albeit accessibility will form part of a trip decision).
- 10.20 The cinemas in Worthing include the Dome and the Connaught Theatre, and, whilst full of character, are dated and small. There is a clear need for a modern multiplex cinema in Worthing, well linked and integrated with the Primary Shopping Area and supported by a strong range of national multiple food and beverage operators. Associated car parking and ease of access will also assist in driving visitor numbers and should form part of the strategy consideration, albeit connectivity with the Primary Shopping Area should be the priority. Any new multiplex can sit alongside the existing Dome cinema, effectively offering a different experience, and possibly even a different type of film choice.
- 10.21 The AMF bowling facility at the Grafton car park is a popular leisure destination in Worthing town centre, albeit the site is identified for redevelopment. The facility is located within a sub-standard unit and a generally hostile car park environment, but the retention and re-provision of a family entertainment/tenpin bowling facility in Worthing town centre should also form part of the Council's strategy to improve leisure provision in the town centre. Key attractors in today's market also include higher class, more modern 'boutique' bowling venues (All Star Lanes, for example), and there is much evidence that these pull visitors from extensive catchment areas looking for a quality leisure 'experience'.
- 10.22 Bowlplex in Brighton appears to dominate the entire catchment, with some residents also choosing Horsham Superbowl and MFA Bowl in Chichester. New provision in Worthing, ideally alongside a new cinema, should be considered as a priority in Worthing town centre. A boutique bowling venue would exceed the quality of current competition and put Worthing 'on the map' across the sub-region offering a differentiated leisure facility, combined with restaurants/bars/karaoke rooms and private party rooms. A straight replacement of AMF would not necessarily be the optimum strategic choice for Worthing town centre, albeit market testing to consider offering both types of venue should be explored.
- 10.23 The seafront and promenade itself is a key feature for Worthing which stretches the length of the town centre boundary. In addition to the beach, the Dome Cinema, Worthing Lido (family entertainment), Pavilion Theatre, AMF Bowling and a selection of cafes/restaurants of varying quality, provide the key attractions. It is apparent from the evidence gathered that the seafront and promenade is not yet being fully utilised or frequently used by the wider catchment or even Core Zone 1, yet is unquestionably a key asset for the town centre. The Council should continue to explore strategies to improve connectivity through existing linkages and also key Areas of Change, including the Grafton Site (No.3). The conversion of St Paul's Church to a multi-purpose arts venue adds a further dimension to the leisure offer of the town, offering a space for productions and live music.
- 10.24 Proposals are coming forwards through public realm improvements for Montague Place/Portland Road, which may encourage linked trips between the town centre and the seafront. It will be crucial for any investment to focus on optimum layout/quality in respect of planned public realm proposals in this area, to maximise pedestrian movement and encourage between the 'two' destinations. The seafront is identified in this study as a 'missed opportunity' which could make a far more positive contribution to the wider vitality and viability of Worthing town centre. Within Core

Zone 1, 30% of respondents stated that they never visit the seafront – a disappointing figure for a seaside town. We recommend the Council explore commissioning a seafront strategy with the aim of increasing visitor numbers.

Other Health Check Indicators

- 10.25 The conclusions set out above have identified an adequately performing centre with substantial room for improvement in both retail and leisure sectors. Additional health check indicators endorse this qualitative positioning, including vacancy rates, rents and footfall. Vacancy rates are below the national average, but above West Sussex averages; commercial rents are below regional averages, and footfall since April 2016 has fallen below levels experienced in the preceding two years. These indicators reinforce the underperforming role of Worthing town centre within the region.

Physical Composition/Layout

- 10.26 Worthing is performing adequately, but substantial opportunity has been identified to transform Worthing to take a step change upwards in terms of the centres attraction and competitiveness. The town centre has a strong physical and operational base to build upon, with some signs of small improvement in recent years. There is much potential for an exciting period of change ahead, taking advantage of key development opportunities, the seafront and an improving economic catchment profile.
- 10.27 A key strength in Worthing is the strongly defined physical ‘character areas’ which should form the focus of a town centre strategy moving forwards, alongside the Areas of Change. There is, for example, a core shopping area (Chapel Road South/Guildbourne/South Street), key gateways to the town centre (Teville Gate/Aquarena), a café culture/niche retail area (Warwick Street/Brighton Road), the seafront, and an area meeting more localised needs alongside small scale niche/independent businesses (Rowlands Road). This is a strong physical base to build upon, with any emerging strategy also being encouraged to focus on those attractive buildings of architectural interest and character.

Convenience Goods ‘Need’

- 10.28 The quantitative analysis has identified that Worthing town centre is not performing the role of a convenience goods shopping destination, albeit the smaller top up stores do complement the wider comparison and leisure offer. The District Centres all have a strong performing foodstore anchor underpinning their vitality and viability, with Tesco Extra at West Durrington the largest foodstore – in floorspace and turnover – in the borough.
- 10.29 The out-of-centre Sainsbury’s is considerably more popular than the out-of-centre Morrisons foodstore which appears to be under-trading. On the edge of Worthing Town Centre, Lidl is identified as being more popular than the Waitrose store, although Waitrose did appear well used during site visits, and combined they are trading in equilibrium.
- 10.30 Some foodstores are trading very well (Sainsbury’s, Lidl, Co-Op Goring Road, Tesco Express Broadwater), but a number of others are showing signs of under-performance in quantitative terms. On balance, when combined, the current convenience goods floorspace in the borough is trading in equilibrium, leading to a relatively limited requirement for new convenience goods floorspace over the period to 2026 (1,256 sq.m net), as summarised in **Table 10.1**.

Table 10.1: Convenience Goods Need Worthing Borough 2021-2033

2021	2026	2031	2033
672 sq.m net	1,256 sq.m net	1,791 sq.m net*	3,168 sq.m net*

**indicative only and should be subject to further review*

- 10.31 We would recommend against planning for additional convenience goods growth beyond the period to 2026 given continuing uncertainties in the market and the need for future study updates in the short-medium terms. To put this convenience goods ‘need’ figure into context, we conclude that the borough plans for a foodstore of the scale somewhere in between the smaller edge-of-centre Lidl and larger Waitrose foodstores. As noted in Section 3, large food megastores are not being built anymore, and this level of need would seem to sit comfortably with market appetite.

Comparison Goods 'Need'

- 10.32 In respect of comparison goods, our analysis found Worthing town centre to be performing satisfactorily, with comparison goods floorspace in Worthing town centre achieving a sales density (turnover per sq.m) of £7,692 per sq.m net — however there is considerable opportunity to consolidate and enhance this performance. Recent studies undertaken for Horsham and Brighton found comparison goods floorspace in these centres to be trading in excess of £10,000 per sq.m net. At present, the town centre has a comparison goods market share of only 44.7% in Zone 1, and 24.3% across the survey area, and there are clear opportunities to claw back lost trade, particularly from the northern and western areas.
- 10.33 In the bulky furniture and floorcoverings category, Worthing town centre is the most popular destination for those living in Zone 1 and also the wider survey area, but there are local variations. Zone 3 and 4 residents favour Horsham given the recent opening of John Lewis at Home, and Zone 5 favour Brighton, Goldstone Retail Park Hove and Ikea in Croydon. Worthing has more customer loyalty in Zone 2, but Chichester and Rustington are also popular destinations.
- 10.34 In the DIY bulky goods category the B&Q at Downlands Retail Park is by far the most popular destination in Zone 1, but there is competition elsewhere in the survey area, primarily from B&Q Shoreham, Wickes Littlehampton and Homebase at Broadbridge Heath Retail Park Horsham. The quantitative assessment has identified need for an additional 9,197 sq.m net comparison goods floorspace by 2026 (Table 10.2).

Table 10.2: Comparison Goods Need Worthing Borough 2021-2033

2021	2026	2031	2033
3,530 sq.m net	9,197 sq.m net	15,799 sq.m net*	15,921 sq.m net*

**indicative only and should be subject to further review*

- 10.35 Again, for the same reasons as for convenience goods, we recommend against planning for development above this level (9,197 sq.m net) given uncertainties in the economy. This figure is, however, based on current market share (baseline), and provided a development was of sufficient quality and critical mass, additional floorspace could be supported based on an increase in market share. This would need to be considered on a case by case basis.

Commercial Leisure 'Need'

- 10.36 The analysis has identified the need to continue to support the café/restaurant market in Worthing town centre, seeking an increase in quality and breadth of offer to drive vibrancy throughout shop opening hours (i.e. breakfast/brunch/lunch/afternoon tea/dinner/evening drinks). Examples include 'Bills' and 'Caballo Lounge'.
- 10.37 There is an identified need for a new multiplex cinema alongside the Dome cinema as the independent/boutique option. Investment should be encouraged in both, whilst any new development should form part of the existing Primary Shopping Area, or well integrated with it. There is also an identified need for a better quality family entertainment/tenpin bowling facility – particularly as the existing AMF bowling is located on the Grafton site identified for redevelopment.
- 10.38 A straight replacement for AMF bowl would not necessarily be the right option for Worthing town centre, which should perhaps aspire instead to a differentiated offer of superior quality to competition in the sub-region. The Council should consider instead attracting a higher quality boutique bowling venue – such as All Star Lanes – which achieve large catchment areas. This would in turn assist in enhancing the wider vitality and viability of the town centre, providing a sufficiently attractive complementary offer can be brought forward.

Town Centre Strategy

- 10.39 The challenge will be for Worthing to bring forward key development opportunity sites in Worthing town centre to enhance the mainstream/higher end/quality comparison retail provision whilst enhancing further the specialist/niche retail offer and café culture, and achieving stronger linkages with, and usage of the seafront. The threat of no new development is a further decline in market share over the next few years, and whilst there have been signs of an improved centre and the realisation of opportunities, the loss of Bhs and Next is not good news. It will be crucial to see short term gains and improvements as part of a wider longer term strategy. The town centre benefits from a number of well-positioned opportunity sites which can be used to improve the offer of Worthing, including diversifying the range of 'main town centre uses', and introducing a new residential community into the town centre. The Council have

published an Investment Prospectus which will be used to help promote Worthing town centre as an investment opportunity.

- 10.40 This evidence based report has identified need for a small foodstore operator (with Aldi having a published requirement), up to c.9,200 sq.m net of comparison goods floorspace, more cafes/restaurants, a multiplex cinema and a mainstream and/or boutique bowling complex. The analysis has also identified the need to aspire to a better quality/high end retail and leisure operators with which to compete more effectively and to take a step change upwards as a town centre destination of choice for a broader socio-economic profile.
- 10.41 Sequentially there are three key Areas of Change that should form the priority for new/additional floorspace: the Stagecoach Site (No.2); Grafton Site (No.3) and Union Place South (No.4). The Stagecoach site is more constrained, and currently identified as being suitable for retail and cultural uses and residential on the upper floors. The site would seem too small for even a smaller discount foodstore, and instead should continue to be earmarked for the uses listed given the seafront location and adjoining Dome Cinema. Cultural uses and a niche food/beverage destination would work well, particularly if underpinned by better linkages with Warwick Street to the rear and the seafront running along the opposite frontage.
- 10.42 The Grafton site (Area of Change No.3) – currently occupied by the unsightly multi-storey car park and tenpin bowling venue – is identified as the key opportunity to improve linkages between the seafront and the primary shopping area. The aspiration is to introduce further retail and leisure uses as part of a landmark development with stronger visual and physical connections. It will be crucial to create an improved retail / town centre circuit taking into account the key gateways, seafront and core retail shopping and leisure areas.
- 10.43 Union Place South (Area of Change No.4) is the largest development opportunity in Worthing town centre, and comprises a number of underutilised sites and vacant parcels of land. It is well integrated with the primary shopping area and provides an excellent opportunity to meet those needs arising as identified earlier in this section. The wider site comprises a large surface car park, vacant land previously occupied by the former police station, and the Guildbourne Centre.
- 10.44 The town centre strategy should, therefore, be centred on existing floorspace combined with these three key areas of change. Other AOC sites may be able to accommodate retail and other main town centre uses, but would be unlikely to deliver the same benefits to the overall vitality and viability of Worthing town centre which needs to come forward over the Council's new Plan period, for the reasons discussed below. Any applications/allocations for retail and other main town centre uses on AOCs which are not within defined frontage would also need to demonstrate compliance with the sequential and impact tests under paragraphs 23-27 of the NPPF.
- 10.45 There are several reasons why we consider the three above-listed AOC sites (AOCs 2,3 and 4) should come forward for retail and other main town centre uses. In recent years, Worthing has been unable to attract high quality clothing/footwear brands which would subsequently consolidate the town centre's catchment area and increase its competitiveness and market share. This apparent failure is likely to be, in part, a consequence of the older style retail units located in the town centre, particularly in the primary area of Montague Street. Here the majority of units have limited floorspace and tend not to match operator requirements for modern flexible retail floorspace.
- 10.46 As discussed in Section 3, retailers have, in recent years, been adapting to market drivers to stay competitive and subsequently re-thinking the composition of their retail portfolios and the location of their physical stores. Many operators are favouring a model which comprises flagship stores in strategic larger centre locations, surrounded by smaller satellite stores. This market trend is referred to as the polarisation of retail activity to larger regional shopping and town/city centres.
- 10.47 Nevertheless, provided the right mix of operators can be attracted to a town centre, there is a trend for high end/higher quality operators to take space in older, more historic units. This is dependent to a large extent on the affluence of the catchment area, the critical mass of similar operators within the same frontage/s, and the quality and attractiveness of those units. Operators include, for example, Cath Kidston, Joules, Jigsaw, White Stuff, Hobbs, Molton Brown, East and JoJo Maman Bebe, with examples of those types of town centre including Marlow in Buckinghamshire, Salcombe in Devon, Horsham and Chichester.
- 10.48 Worthing does have the potential to achieve this type of representation, and must work closely with landlords, landowners and commercial agents to reposition the town centre character areas alongside the development of the strategic Areas of Change – most notably the Grafton Site and Union Place South. If for example, these can accommodate larger floorplates for mainstream/higher end comparison operators looking for those types of units, existing tenants in Worthing can relocate alongside new operators to the town centre. This strategy would free up the

more historic character areas (South Street/Montague Street) to implement a co-ordinated tenant target of those types of high end operators noted above who would take space in the more historic units.

- 10.49 This type of town centre strategy would effectively reinforce the identified character areas, providing Worthing with a strong identity and more/varied reasons to visit. We understand that the affluence of seaside towns along this stretch of the coast is only increasing as people are being 'out-priced' in centres such as Brighton and the displacement of this activity is beginning to benefit other seaside town, including Worthing. The Council should take a co-ordinated view of this economic position when considering an aspirational town centre strategy for Worthing.
- 10.50 We recommend the Council commission commercial consultants to advise on this type of strategy, alongside consultation with landlords and key opportunity site developers/architects. A positive outcome of this type of complex strategy will only be successful through consultation and engagement of all key parties.
- 10.51 We recommend that the high end, quality quarter for clothing and footwear should form a focus of activity somewhere within Character Area 7 (South Street) and/or Character Area 8 (Montague Street) and the Grafton site. The Grafton site is also identified for restaurant uses, and we recommend these to be good quality in this key strategic town centre location, with examples including Bills, Prezzo, Wagamama, Cote, Loch Fyne and high end independent operators. The general emphasis in this town centre/seafront location should be an improved quality of operator, whilst connectivity between the seafront and shopping area prioritised.
- 10.52 We have noted the need to re-locate or re-provide the tenpin bowling facility currently located on the Grafton site, and have identified the potential to attract a boutique bowling facility. This would sit comfortably alongside the higher end restaurant offer and clothing/footwear operators if it can be brought forward as part of the Grafton site redevelopment.
- 10.53 This strategy for the South Street/Grafton/Montague Place area of the town centre would sit well alongside the redevelopment of Union Place South/Guildbourne Centre. Here there is an opportunity to provide larger box retail units to accommodate relocations from existing town centre tenants who would generally desire more space and flagship stores (Next/Top Shop/JD Sports, for example) and attract new tenants to the town centre (Primark, for example). This character area could form the focus of key town centre anchors and mainstream retailers in larger, modern units, whilst the Montague/Grafton area would become characterised by smaller, boutique high end operators.
- 10.54 A town centre strategy with commercial advisors would be essential to manage relocations and the critical mass of operators required to ensure the success of both character areas.
- 10.55 Union Place South is of sufficient scale to also become the location of the commercial town centre leisure quarter anchored by a multiplex cinema. We would, however, warn against seeking to mirror the competition at Chichester Gate/Brighton Marina/Crawley which offer mid-range food/beverage 'leisure parks'. Whilst some such operators could be encouraged, the Council should seek a higher quality restaurant/bar offer underpinned by a quality 'town centre' environment, well connected to the Primary Shopping Area. We recommend avoiding the creation of a 'leisure park', instead focusing on the creation of an extension to the Primary Shopping Area synonymous with a town centre environment.
- 10.56 Warwick Street should be protected in policy as a café culture/restaurant destination with associated niche/independent retailing. This is a key character area that provides an additional reason for visiting Worthing town centre, and differentiates it from other centres. The Council should focus on improving the quality of the environment, de-cluttering street furniture, and consider a shop frontage design guide to continue to uplift the area and create an 'identity'. Brighton Road should be protected as a niche/independent retailing area.

Town Centre Strategy: Next Steps

- 10.57 This evidence based study has identified sub-regional challenges to market share, the performance of existing floorspace, and the extent of need to accommodate additional/replacement floorspace in Worthing town centre. The report has identified the need to be aspirational, and consider the realisation of the Areas of Change alongside existing floorplates in order to underpin a future strategy on a comprehensive approach in which all parts of the town centre are integral to each other.
- 10.58 The Areas of Change should not be considered in isolation, particularly when considering the recommendation to aspire to a higher end commercial heart/quarter through the re-organisation and relocation of certain operators to more appropriate locations and floorplates. A co-ordination strategy underpinned by clearly defined Character Areas is required. Recommendations for the Character Areas are clearly set out below, under 'Key Recommendations'.

- 10.59 We recommend the preparation of a Town Centre-wide Feasibility and Investment Plan, to include the Areas of Change. Project input should include expertise from commercial agents, design architects, and financial viability specialists in order to understand what can physically 'fit' on the site, what is the commercial demand for representation/what tenant line-up can be levered, and assurance that that mix/scale of development is financially viable and therefore 'realistic'.

District/Local Centres

- 10.60 In addition to our assessment of the performance of Worthing town centre, we have also undertaken an assessment of the Council's three defined district centres at Broadwater, Goring Road and West Durrington. **Goring Road** is a strong performing District Centre. It has a good balance of uses, focused primarily in the convenience, retail service and financial/business service categories. This is to be expected in a district centre. The number of leisure services is below average, but the quality is good including Lazy Brunch Kitchen, Mad Hatters and recent investment by Costa Coffee. There are some fast food take-aways, but these do not dominate the retail composition of the centre. Goring Road is the most used district centre in the borough; it is a busy, attractive centre with wide pavements and plentiful free on-street parking; there is a low vacancy rate, high frequency of visit and a good dwell time.
- 10.61 **Broadwater** is similar in scale to Goring Road, but it is located on a busier through-route – the main A24 arterial route out of Worthing. The pavements are wider and there is less of a barrier to the road when compared to Goring Road. This location impacts on the consumer experience and attractiveness of the centre. Broadwater is the second most visited district centre in the borough after Goring Road.
- 10.62 Overall, Broadwater District Centre provides a good choice and range of businesses, albeit falls marginally short of the quality identified in Goring Road District Centre. There are, for example, fewer national multiples and two major banks have recently closed. The mix of uses is not as balanced when compared to Goring Road, exhibiting a strong proportion of retail and financial/business services. There has been recent investment from Starbucks and Pizarelli, and there is a good selection of daytime cafes. The two foodstores which 'anchor' the centre are modern in appearance.
- 10.63 Broadwater Boulevard is identified as a poor performing part of the district centre with high vacancy rate and low footfall. A strategy for the ground floor should be a strategic priority for the Council moving forwards. The centre does benefit from free on-street parking for up to 2 hours, but appeared less busy than Goring Road during site visits.
- 10.64 **West Durrington** is centred on a large Tesco Extra foodstore; the largest foodstore in the borough with a high proportion of comparison goods products. The results of the analysis highlighted the centres role as a main food shopping destination with a high frequency of visit and dwell time primarily between 1.5 and 2 hours. The most frequently cited reason for visiting was food shopping, albeit a strong proportion noted cafes/pubs/restaurants – an offer which many would like to see expanded and improved on in the future. The centre benefits from large-scale free car parking.
- 10.65 Worthing borough has 8 medium sized local centres, and 15 small sized local centres, all reasonably well distributed throughout the borough. The analysis of composition demonstrates that the retail hierarchy is 'fit for purpose' and accurately reflects each centres scale and role. Many offer smaller scale convenience stores and a range of other retail services such as Post Offices, hair dressers, pharmacy's, laundrette's and ATM's.

Boundaries, Frontages and the use of Article 4 Directions

- 10.66 In terms of frontage and boundary policies, the Local Plan should clearly identify the following areas to ensure consistency with the definitions set out in Annex 2 of the NPPF:
- Town Centre Boundary;
 - Primary Shopping Area (comprising Primary and Secondary Shopping Frontage);
 - Primary Shopping Frontage;
 - Secondary Shopping Frontage.
- 10.67 We have set out in Section 9 a detailed assessment of existing boundaries and frontages in Worthing town centre and the district centres at Broadwater, Goring and West Durrington, and have recommended a number of amendments to existing allocations in all of the centres with the exception of West Durrington, which will help ensure the centres remain vital and viable destinations over the course of the Council's new Local Plan period.
- 10.68 In considering the consistency and robustness of these frontage policies, it is relevant to recognise recent changes to permitted development rights. In particular, the Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within

shopping frontages. The amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use.

10.69 The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities, such as the Council's Core Strategy Policy 6 which protects the level of A1 uses in the primary frontage Zone A.

10.70 The Council's policy framework has effectively protected the core retail function of the primary shopping area in recent years, however the Council does not currently have any Article 4 directions in place covering its town, district and local centres. Therefore, under permitted development rights, loss of class A1 retail units to class A2, A3, D2 or C3 uses (in some cases subject to unit size and prior approval, as set out in Section 2) cannot currently be controlled by the Council. It is, therefore, recommended that the Council seek to introduce appropriate Article 4 directions across its network of centres in order to protect their vitality and viability over the course of the Council's new Local Plan period. The justification for this is as follows:

- Paragraph 23 of the NPPF states that local planning authorities should pursue policies to support the vitality and viability of their town centres, and define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages, setting policies which make it clear which uses will be permitted in each location. Paragraph 23 of the NPPF also states that Councils should promote 'competitive town centres' that provide 'customer choice and a diverse retail offer'.
- Applying Article 4 directions will enable proposals seeking the loss of class A1 floorspace to be assessed against the Borough's development plan. The adopted development plan (headed by the 2011 Core Strategy) contains policies which seek to promote a diverse range of uses in the Council's network of centres, and directs new retail development to Worthing town centre. As set out in Section 9, it is recommended that this policy approach is carried forward into the Council's new Local Plan and therefore an appropriate mechanism needs to be in place to support this policy approach.
- Any loss of retail floorspace should be managed through the planning system, in order to enable the Council to undertake a full assessment of any proposals and the implications this may have on the vitality and viability of any affected centres. The uncontrolled loss of class A1 units could negatively impact on the vitality and viability of the Borough's designated town, district and local centres as it offers the opportunity for the uncontrolled loss of retail units to other uses which will less well serve the needs of the Borough's residents.
- This study has identified that comparison goods retailing underpins the vitality and viability of Worthing town centre, and we expect this will continue to remain the case during the Council's new Local Plan period. In order for the comparison goods shopping function of Worthing town centre to be retained and enhanced, it is necessary for a critical mass of floorspace for retail use to be retained within the centre.
- We have also identified that there is a loss of comparison goods retail spend from Worthing Borough to competing centres including Brighton, Horsham, Chichester and Shoreham, and accordingly recommend that the Council should seek to enhance the comparison goods retail offer of Worthing town centre to ensure a greater proportion of spend is retained locally, to enable to overall vitality and viability of the centre to benefit. The uncontrolled loss of class A1 retail floorspace from Worthing town centre would negatively impact upon this objective.
- We have also identified that the district centres at Goring, Broadwater and West Durrington are all underpinned by an important retail function, and whilst some greater flexibility can be applied to the range of uses which can be supported within these centres, it is vital to ensure that they continue to meet local residents' essential day-to-day shopping needs and assist in promoting sustainable patterns of shopping in the Borough. The retail function of these three district centres therefore should continue to be protected. We have outlined in Section 9 a recommended policy approach to the Council's network of district centres which can be followed in the event that appropriate Article 4 directions are introduced.
- The network of small-scale local centres and medium-scale local centres also play a significant role in meeting local shopping needs and the loss of these facilities could potentially have a negative impact on sustainable shopping patterns and ensuring that all residents are able to access basic shopping needs within easy reach of their homes. It is therefore considered that Article 4 directions are also introduced to cover the small-scale local centres and medium-scale local centres.
- This study has also identified that there is a positive 'need' for the Council to positively plan for additional comparison and convenience goods floorspace over its new Local Plan period. The uncontrolled loss of class A1 floorspace would undermine this requirement.

10.71 Having regard to the above, it is recommended that Article 4 directions are applied to:

- Primary shopping frontage, Worthing town centre. This will enable the Council to consider each change of use application on its own merits and protect the core comparison goods shopping function at a vulnerable but opportunistic time for Worthing town centre.
- Secondary Zone A shopping frontage, Worthing town centre. In particular, Warwick Street is a key character area, adding a different dimension and area of interest to the town centre. Providing an attractive café culture and independent/niche retailing offer, the Council should consider an Article 4 direction for the Central Shopping Area Zone B – which covers Warwick Street – to prevent permitted development to A2/A4/A5 to protect the food and drink restaurant/café culture of this key Character Area.
- Secondary shopping frontage, Goring, Broadwater and West Durrington district centres.
- Small-scale local centres and medium-scale local centres.

Summary of key recommendations for Worthing town centre

- WTC1:** Retain the Primary and Shopping Frontages as defined which reflect the current function of the town centre, with the exception of recommended adjustments as set out in Section 9 of this study.
- WTC2:** Ensure consistency with NPPF definitions as follows:
- Primary Shopping Frontage
 - Secondary Shopping Frontage
 - Primary Shopping Area
- In this context, rename current definitions to:
- Primary Shopping Frontage Zone A
 - Secondary Shopping Frontage Zone A
 - Secondary Shopping Frontage Zone B
- WTC3:** Core Strategy Policy 6 is designed to protect the proportion of Use Class A1 within Primary Shopping Frontage Zone A, but this may now be undermined by the change in legislation allowing more flexible permitted development rights to Use Class A2 and A3. We recommend the introduction of an Article 4 Direction across Primary Shopping Frontage Zone and Secondary Shopping Frontage Zone A to avoid the loss of Use Class A1.
- WTC4:** Introduce an Article 4 Direction across Warwick Street to avoid change of use to Class A2/A4 and A5, to protect the food and drink restaurant/café culture of this key Character Area. This will ensure the Council can consider each application on a case by case basis.
- WTC5:** The defined policy shopping frontages reflect the current role and different areas of the town centre and enable sufficient control / flexibility of uses across these areas. The Council should – in addition – identify a series of clearly defined ‘Character Areas’ to reflect and underpin a commitment to the Town Centre Strategy moving forwards and aspirations for growth and change. We recommend the following ‘Character Areas’:
- **Teville Gate:** Town Centre Gateway and a focus for non-retail ‘other’ town centre uses including hotels, health clubs, offices and car parking. Teville Gate to remain ‘out-of-centre’. Suggested reference: Teville Gate;
 - **Chapel Road Cultural and Civic Quarter:** Retention as cultural and civic quarter, outside but on the edge of the Primary Shopping Area. Suggested reference: Cultural and Civic Quarter;
 - **Chapel Road South/Guildbourne/Union Place South:** Key town centre retail anchors, mainstream anchors, bigger box units, new multiplex cinema and food and beverage leisure operators. Located within a revised Primary Shopping Area at a future point in time following implementation. Suggested reference: Commercial Heart;
 - **Warwick Street/Brighton Road:** café cultural, food and beverage, specialist/niche/independent retailing. Located within the Primary Shopping Area. Suggested reference: Specialist Retailing/Café Culture;
 - **South Street/Montague Street/Grafton Site:** Aspirational high end retailing, food and beverage, and commercial leisure quarter anchored by a boutique bowling ‘destination’. Strong links between ‘Commercial Heart’ and Seafont, and located within the Primary Shopping Area. Suggested reference: Aspirational High End Commercial Quarter;
 - **Rowlands Road:** Specialist/independent/niche retailing, and a local retail services offer. Located within the Primary Shopping Area. Suggested reference: Rowlands Road.

- WTC6:** Prepare a town centre wide (including Areas of Change) 'Feasibility and Investment Plan', ensuring a comprehensive approach supporting the emergence of the aspirational Character Area composition moving forwards. Draw on the expertise of commercial agents, design architects and financial viability specialisms. The output will inform the commercial and physical ability to implement the aspiration in existing floorplates and on development opportunity sites/Areas of Change.
- WTC7:** Ensure the provision of a sufficient supply of suitable sites within the Primary Shopping Area and Areas of Change to accommodate 9,200 sq.m net of comparison goods floorspace over the period to 2026. The Feasibility and Investment Plan should clarify opportunity and deliverability, both commercially and physically, taking into consideration viability.
- WTC8:** Ensure the provision of a sufficient supply of suitable sites within the Primary Shopping Area and Areas of Change to accommodate 1,250 sq.m net of convenience goods floorspace over the period to 2026. The Feasibility and Investment Plan should clarify opportunity and deliverability, both commercially and physically, taking into consideration viability.
- WTC9:** Plan to accommodate a multiplex cinema, provided such a proposal can be located within the Primary Shopping Area or can demonstrate strong linkages and integration with the Primary Shopping Area (PSA). The preferred site is identified as Union Place South, within the Commercial Heart Character Area.
- WTC10:** Continue to support the Dome Cinema as an independent/art-house destination, alongside a new multiplex cinema operator. Stronger town centres are able to provide a dual, complementary offer, and Worthing should aspire to retain this breadth of offer.
- WTC11:** Plan to accommodate a high end boutique bowling destination, provided such a proposal can be located within the Primary Shopping Area or can demonstrate strong linkages and integration with the Primary Shopping Area (PSA).
- WTC12:** Through the town centre strategy Feasibility and Investment Plan, aim to reinforce a strong retail circuit and linkages within the Commercial Heart through to the seafront and throughout the more peripheral east/west Character Areas including Rowlands Road and Warwick Street/Brighton Road.
- WTC13:** Monitor and analyse car park pricing, usage and capacity and any changes over time that may directly affect visitation and dwell time.
- WTC14:** The Council should monitor where possible, change in competing centres and the level of influence these have on Worthing's catchment in the future. This might be through Officer research and/or regular retail/town centre study updates. It will be informative to understand the level of competition, extent of change and new operators being introduced to those centres, including Brighton, Horsham, Chichester and Shoreham.
- WTC15:** Enforce an impact threshold within future planning policy documents, ensuring that edge and out-of-centre retail development proposals are required to undertake a full and detailed impact assessment for schemes up to 500 sq.m gross.
- WTC16:** Retain, enhance and support where possible the cultural and leisure offer provided in Worthing town centre, including the role of the Connaught and Pavilion Theatre, museum and the Pier.
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NPPF Terms

- * **Edge of centre:** For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.
- * **Main town centre uses:** 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).
- * **Out of centre:** A location which is not in or on the edge of a centre but not necessarily outside the urban area.
- * **Out of town:** A location out of centre that is outside the existing urban area.
- * **Primary shopping area:** Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
- * **Primary and secondary frontages:** Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.
- * **Town centre:** Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Technical Terms

- * **Benchmark turnover:** The expected turnover of existing retail facilities based on sales floorspace and expected average sales densities.
- * **Catchment area:** this is an area where a centre or store attracts most of its trade.
- * **Claw back:** this is a catchment area's expenditure that is currently spent outside a catchment, but is encouraged to be spent within a catchment through the development of new floorspace.
- * **Comparison goods:** Refers to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music 'Service' uses refer to commercial leisure services such as restaurants and cafes, as well as retail services such as hairdressers, beauty salons, banks, building societies and estate agents. Non-retail uses such as cinemas and arts centres are not included in Experian Goad's analysis, but are accounted for qualitatively through our own analysis.
- * **Comparison spending:** expenditure (including VAT as applicable) on goods in COICOP categories: clothing materials & garments, shoes & other footwear, materials for maintenance & repair of dwellings, furniture & furnishings; carpets and other floor coverings, household textiles, major household appliances, whether electric or not, small electric household appliances, tools and miscellaneous accessories, glassware, tableware and household utensils, medical goods and other pharmaceutical products, therapeutic appliances and equipment, bicycles, recording media, games, toys and hobbies; sport and camping equipment, musical instruments, gardens, plants and flowers, pets and related products, books and stationery, audio-visual, photographic and information processing equipment, appliances for personal care, jewellery, watches and clocks, other personal effects.
- * **Convenience goods:** Refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on.

- * **Convenience spending:** expenditure (including VAT as applicable) on goods in COICOP categories: food and non-alcoholic beverages, tobacco, alcoholic beverages (off-trade), newspapers and periodicals, non-durable household goods.
- * **Expenditure forecasts:** assessments of future expenditure based on applying stated growth rates, based on information provided by data providers such as Experian.
- * **Expenditure projections:** estimates of future expenditure obtained by projecting past trends in expenditure by means of recognised statistical extrapolation technique.
- * **Gross floorspace:** Total external floorspace including exterior walls.
- * **Forecast year(s)/internal year(s):** these are in the year(s) when growth is forecast.
- * **Independent retailers:** Single-store or limited store retailers (typically with a maximum of nine outlets)
- * **Inflow:** this is expenditure generated from beyond a study area/catchment area that is spent in centres/stores within the study area/catchment area.
- * **Linked trip:** combining a visit to a supermarket or other use with a trip to use other shops and services in a nearby town/district/local/village centre.
- * **Leakage:** expenditure within a study area/catchment area that is spent outside the study area/catchment area.
- * **Market share:** the proportion of study area/catchment area's expenditure spent in a centre or store, expressed as a percentage.
- * **Multiple retailers:** National or regional 'chain store' retailers.
- * **Net floorspace:** Retail floorspace devoted to the sale of goods, excluding storage space (i.e. the trading area).
- * **Overtrading:** the amount of turnover in excess of a company or expected benchmark turnover.
- * **Per capita expenditure:** amount of money per annum spent on a category of goods by one person per year.
- * **Per capita expenditure growth per annum:** annualised real growth in spending (using constant prices).
- * **Qualitative need:** floorspace required to improve the provision and distribution of shopping and leisure services to improve choice, meet the needs of the community and promote the vitality and viability of town centres.
- * **Quantitative need:** floorspace required to support the projected expenditure growth over the plan period.
- * **Sales density:** the turnover per sqm of net floorspace achieved by retail floorspace.
- * **Sales density growth:** the annualised percentage of growth in turnover of existing floorspace.
- * **Special forms of trading (SFT):** Non-store based retail spending, including via the internet, mail order, markets and telephone sales. The majority of special forms of trading is accounted for by online shopping.
- * **Study area:** this is the area where a study of shopping patterns is based upon; it is normally divided into zones.
- * **Turnover efficiency:** An allowance for a retailer's ability to improve their turnover efficiency of sales density and the potential for existing floorspace to increase its productivity in the future, meaning that retailers increase their turnover to floorspace ratio.
- * **Under trading:** the amount of turnover below a company 'benchmark' turnover.