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Worthing Retail & Main Town Centre Uses Study

Executive Summary, August 2017



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For and on behalf of GVA Grimley Ltd

Executive Summary

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.

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.

In addition to on-site and desk based evidence gathering, the report is informed by a new household telephone survey covering 500 households across five survey zones. 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.

Policy framework

The study has full regard to relevant national and development plan policy. At the national level, the **National Planning Policy Framework (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 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.

At the local level, 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. 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.

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.

Core Strategy Policy 2, Areas of Change, promotes the focus for regeneration and development proposals to be directed towards 12 'Areas of Change'. Of direct relevance to this study are three Areas of Change which are prominently located in Worthing town centre, as follows:

- **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.



Guildbourne Centre, Worthing (part of Area of Change 4)

- **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.

The Core Strategy also identifies a hierarchy of town, district and local centres within the Borough:

- Worthing is identified as a Town Centre, the highest-order centre in the Borough;
- District Centres are identified at Broadwater, Goring Road and West Durrington;
- Eight 'medium-scale' local centres and 15 'small-scale' local centres sit below this in the Borough hierarchy.

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.

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.

Market context

The study has been prepared at the time of a rapidly changing market in terms of the role of retailing in town centres, consumer trends and technological advances. 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.

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.

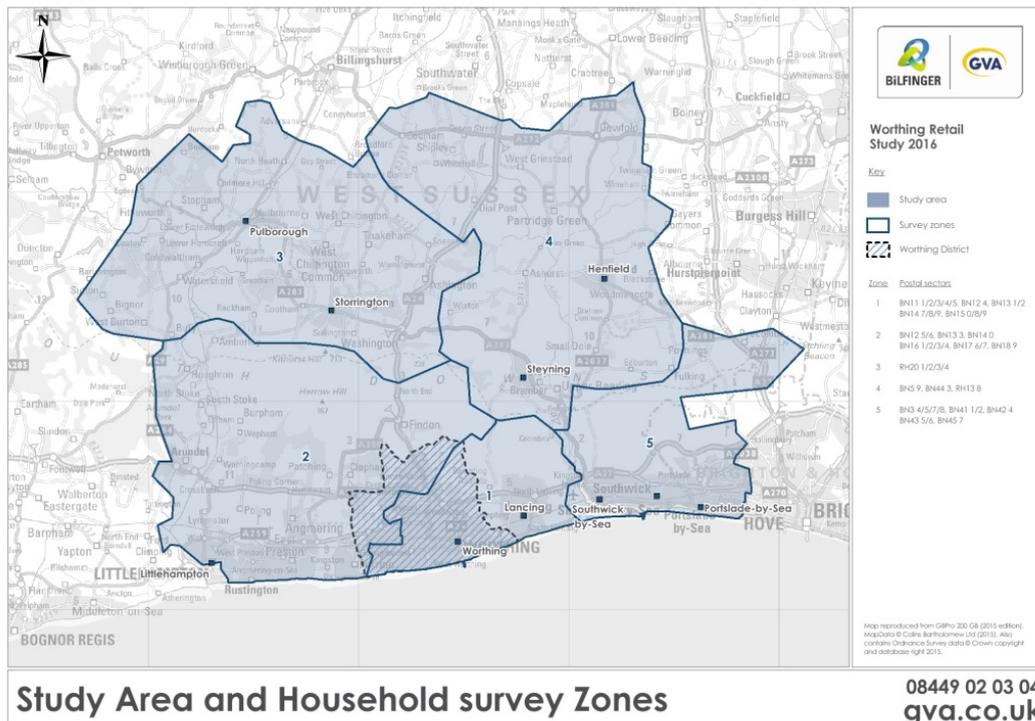
Notwithstanding this, town centre strategies which support the continued evolution of the high street must continue to be prioritised. This should involve providing a high quality shopping ‘experience’, maximising the benefits of tourist trade/leisure market, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

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. Worthing 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.

The sub-regional context

As noted above, in order to inform the findings of the study, a household telephone survey was undertaken, identifying where residents in Worthing and its surrounding catchment are currently undertaking their shopping. The survey area and its split into five survey zones is shown in **Plan A** below.

Plan A: Household telephone survey area



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. 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.

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.

Worthing town centre health check

The study undertakes a detailed 'health check' assessment of Worthing town centre, based on criteria set out in the Government's Planning Practice Guidance. The key findings of this are as follows:

- The convenience goods offer in Worthing town centre – in terms of number of units and floorspace – is below national average. There are four small scale top-up foodstores in the Primary Shopping Area which primarily cater for 'passing trade', as well as larger Lidl and Waitrose stores located on the edge of the town centre. 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. 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 is above national average in terms of numbers of units in most categories, 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. 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 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.

District centres & local centres health checks

- **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 of the offer is good. 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 evidence of good levels of dwell time.



Goring Road district centre

- **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 the two foodstores in the centre 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.
- **West Durrington** District Centre is centred on a Tesco Extra store, the largest foodstore in the borough with a high proportion of non-food comparison products. The results of the analysis highlighted the centre's role as a main food shopping destination with a high frequency of visit and dwell time primarily between 1.5 and 2 hours.
- Worthing borough additionally 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.

Convenience Goods 'Need'

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.

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 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.

Some foodstores across the Borough 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 A**.

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. Owing to changes in the convenience goods market, large food megastores are not being built anymore, and this level of need would seem to sit comfortably with market appetite.

Table A: Convenience Goods Need Worthing Borough 2021-2033

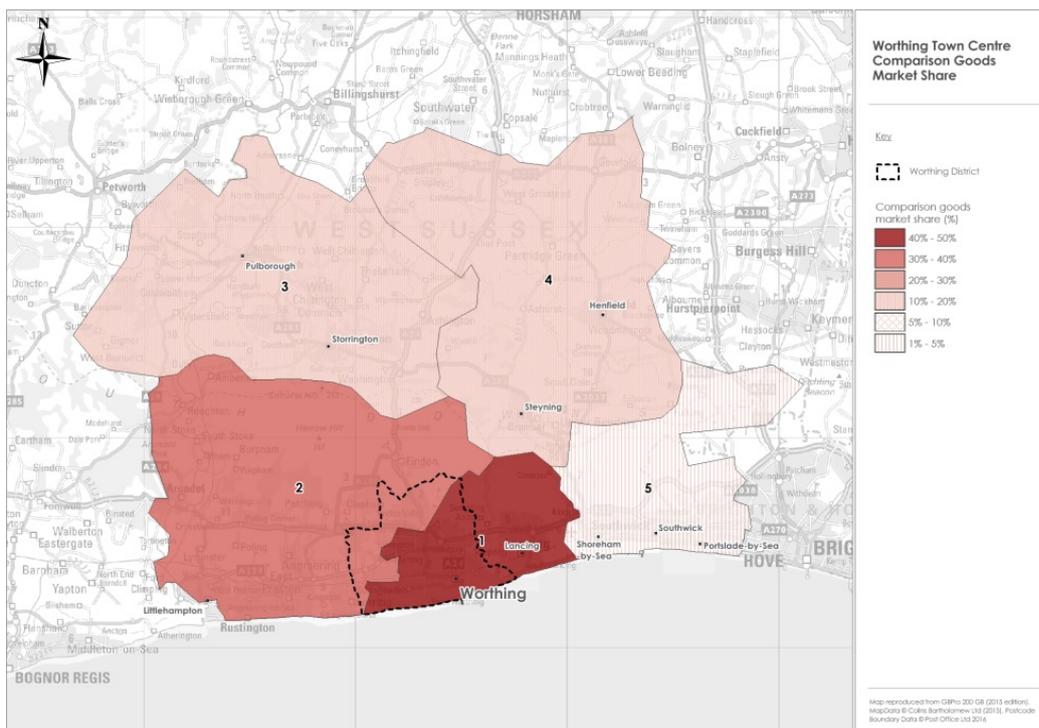
| 2021 | 2026 | 2031 | 2033 |
|--------------|----------------|-----------------|-----------------|
| 672 sq.m net | 1,256 sq.m net | 1,791 sq.m net* | 3,168 sq.m net* |

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

Comparison Goods ‘Need’

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. The catchment of Worthing town centre for comparison goods shopping is shown in **Plan B**.

Plan B: Worthing town centre comparison goods catchment



The study identifies that the Council should plan for the following levels of comparison goods floorspace:

Table B: 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*

For the same reasons as for convenience goods, we recommend against planning for development beyond 2026 (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 Needs

Our 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'. 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. 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.

Strategy & recommendations

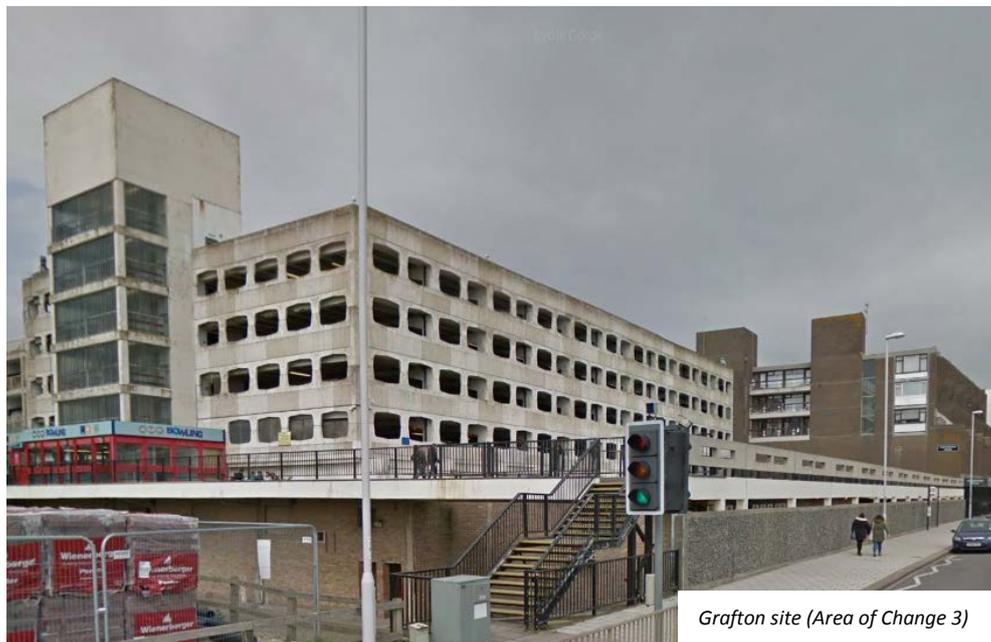
Worthing Town Centre Strategy

Having considered the evidence summarised above, the Study proceeds to identify a strategy for Worthing town centre. 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.

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.

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.

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.



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.

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 24-27 of the NPPF.

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.

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.

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.

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.

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.

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.

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.



Connaught Theatre, Worthing town centre

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.

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.

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.

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.

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

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.

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'.

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'.

Boundaries, Frontages and the use of Article 4 Directions

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.

We have set out in Section 9 of the Study 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.

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. 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.

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. 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.