

Worthing Town Centre Retail Study Update

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urban shape
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1. Introduction

- 1.1 In August 2017, Adur & Worthing Councils published the borough wide Worthing Retail and Main Town Centre Uses Study (The 2017 Study). The purpose of that study was to provide an up-to-date picture of current and future retail needs, and to provide the Council with recommendations regarding the robustness of their existing policy approach in respect of retail and town centres. It has been used by the Council to inform the emerging Worthing Local Plan which will guide development in the borough until 2033, and is also at the Council's disposal to assist in the determination of planning applications for new development in the Borough.
- 1.2 Adur and Worthing Council have subsequently instructed Urban Shape to prepare an update to the 2017 Study focusing specifically on Worthing Town Centre, and is in response to the ongoing evolution of national market trends and government policy/guidance evolution. The study update will inform the forthcoming (Regulation 19) Draft Local Plan, scheduled for consultation during 2020. It is considered necessary within this report to review the previous evidence base and outputs and to assess the implications of change on our conclusions and recommendations. The study update is structured as follows:
- **Section 2** summarises the national, strategic and local planning policies relevant to retail and town centre uses in Worthing.
 - **Section 3** considers the most up-to-date 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** discusses recent town centre research, reporting, and the government's proposed planning reform which, if implemented, will directly impact planning policy approaches.
 - **Section 5** provides an overview of the key findings and recommendations set out in the 2017 Worthing Retail and Main Town Centre Uses Study, as a baseline for this update.
 - **Section 6** sets out the current performance of Worthing Town Centre, and how this has changed since the 2017 Study;
 - **Section 7** reviews the findings of our study against the 2017 outputs to consider potential implications for recommended town centre policies and strategy.

Covid-19

- 1.3 This report was finalised at the start of the UK's response to the Covid-19 global pandemic (March 2020). It is widely assumed that there will be some level of economic fall-out as a consequence of the health pandemic, but the full implications will not be known for many weeks or months. The direct impact on town centres will be directly linked to the global and national economies, but locally, the resurgence and demand for self-sufficiency must be seen as an opportunity for local independent shops and businesses. We discuss this further in Section 3 alongside a review of Experian's early high-level economic scenario paper, the aim of which is to provide a high-level steer as to the trajectories that the UK economy could follow.



2. Policy Framework

National Planning Policy Framework (NPPF), February 2019

- 2.1 The most up-to-date National Planning Policy Framework (NPPF) was published on 19 February 2019. The document sets out the Government's presumption in favour of sustainable development, and confirms that the planning system should be genuinely plan-led. Succinct and up-to-date plans are required to provide a positive vision for the future of each area, and the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. Local plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change.
- 2.2 Section 7 seeks to ensure the vitality of town centres, emphasising that planning policies and decisions should support the role that town centres play at the heart of local communities. A positive approach should be taken to their growth, management and adaptation. Planning policies are encouraged to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, and the extent of primary shopping areas and the location of development opportunity sites. The NPPF states that planning policies should also recognised the benefits of residential development and town centre living.
- 2.3 In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.
- 2.4 In respect of Development Management, paragraph 86 of the NPPF (as revised) states that a sequential assessment is required for planning applications for 'main town centre uses' (which include retail) that are not in an existing centre and are not in accordance with an up to date Local Plan. Applications for main town centre uses should be located in town centre locations, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. Paragraph 87 adds that when considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre.
- 2.5 Paragraph 89 of the NPPF confirms that when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan, LPAs should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set floorspace threshold, the default threshold is 2,500 sq m of gross floorspace. Impact assessments are required to assess:
 - the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).
- 2.6 The NPPF directs that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 89, it should be refused.

Planning Practice Guidance (PPG) (2014)

- 2.7 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). It was last updated on 22 July 2019. 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



also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

- 2.8 The guidance provides additional detail on applying the sequential and impact test, and whilst the NPPF has removed reference to shopping 'frontages', the PPG confirms that authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would be in addition to Primary Shopping Areas.

Permitted Development

- 2.9 As set out in the 2017 Study, a range of permitted development rights covering Class A1 retail units were made permanent on 15th April 2016. Specifically, the changes 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 (dwelling houses), 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.
- 2.11 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.
- 2.12 Many local planning authorities 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 planning applications for changes of use within defined Article 4 areas are assessed against the Council's development plan. A summary of the changes allowed under permitted development in respect of A-class and Sui Generis uses is provided in Appendix 1. Government consultation has recently taken place to reform the Use Class A category of the Use Classes Order. This is discussed in more detail later in this section.

The Development Plan

Worthing Borough Adopted Core Strategy (April 2011)

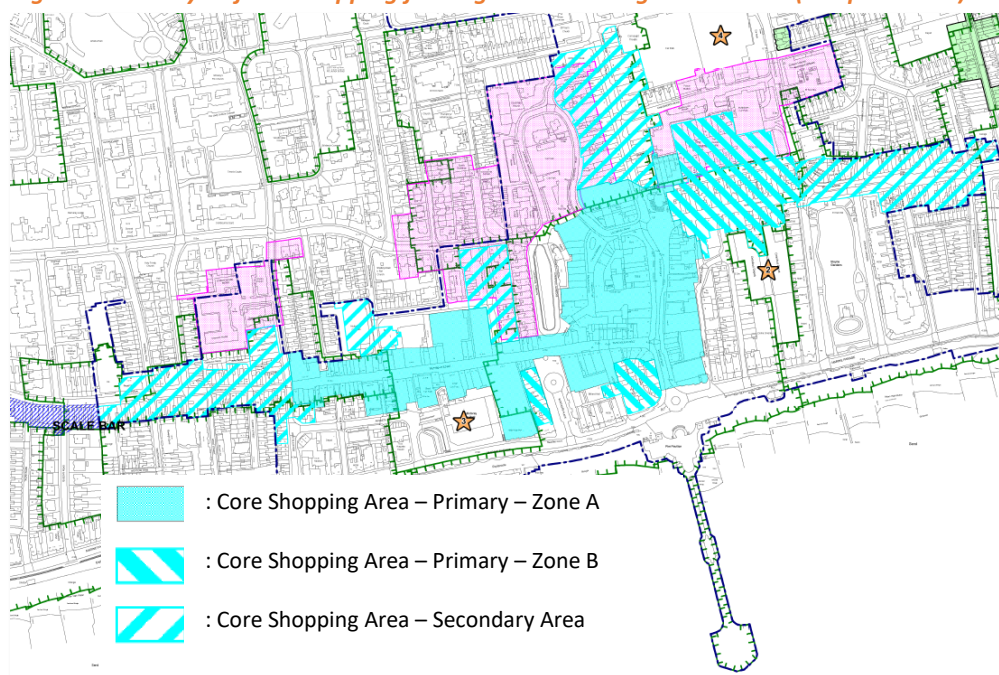
- 2.13 Worthing Council adopted their Core Strategy document in April 2011; and was discussed in detail in the 2017 Study. It is relevant to note certain key points in this update report.
- 2.14 Strategic Objective 2 seeks to revitalise Worthing's town centre and seafront. These areas are identified as 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 is highlighted as being key to bringing about this change. The Council hope to bring forward development through utilising key identified sites for mixed use development (see Appendix 2: Areas of Change).

- 2.15 The Local Plan confirms that development proposals on these 'Areas of Change' 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.
- 2.16 In terms of regeneration, 'Core Strategy Policy 6: Retail' identifies two prominent shopping areas as a focus for redevelopment, including 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 and to promote consolidation of the existing retail provision in Worthing town centre. 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.
- 2.17 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 2.1).
- 2.18 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. The 2017 Study provided recommendations to amend this particular part of the policy framework, and we set these out in Section 5.

Figure 2.1: Policy-defined shopping frontages in Worthing town centre (Adopted 2011)



Source: Worthing Core Strategy (2011) Proposals Map



2.19 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.

A New Local Plan for Worthing – Emerging Policy

2.20 Worthing Borough Council is in the process of preparing a new development plan, called the Worthing Local Plan. When adopted, the Plan will be a key document in shaping the future of the borough over a 15-year period as it provides the strategy for growth, setting out what development will take place and where. When in place, the new Plan will replace the borough's existing local planning policies and will be an important consideration in deciding planning applications.

2.21 The first stage Draft Local Plan was published for consultation (Regulation 18) between 31st October and 12th December 2018. Policy CP14 set out the draft retail policy, with consultation comments being generally supportive. Some respondents felt that the policy needed to ensure that the town centre retail units have sufficient flexibility in terms of use class to respond to demand; with one suggestion – for example – being that the Montague Shopping Centre should be removed from Primary Zone A and reclassified as Zone B to be less restrictive. Other comments raised the need for more 'anchor' shops, and concerns about the high number of cafes and coffee shops.

2.22 In response, the Council acknowledged that the retail sector is going through significant change and that this is likely to have implications for all areas, particularly the town centre. Whilst the evidence put in place to support the draft Local Plan strongly supported the policy position established in CP14 Officers accepted that this needs to be updated to reflect more recent changes in guidance, the retail market and wider aspirations for the town centre. The proposed policy position will be reconsidered to assess whether a greater degree of flexibility within the retail hierarchy would be beneficial.

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 and positively seek opportunities to meet the development needs of their area.
- The NPPF focuses on Primary Shopping Areas, removing reference to Primary and Secondary Frontages, but the PPG confirms that such allocations remain useful tools if desired in supporting the vitality and viability of town centres.
- The adopted Worthing Local Plan 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. National Trends

- 3.1 Trends in the retail and leisure sector influence how people use town centres. In turn, these have important implications on the formulation of planning and spatial strategies and the future vitality and viability of each individual town centre across the UK.
- 3.2 Trends in recent years have been well documented. They broadly relate to global economic fluctuations, growth in on-line shopping/multi-channel retailing; changes in the property and space requirements of retail operators; evolution towards multi-dimensional town centres and the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth in discount retailers and more varied food shopping habits.
- 3.3 Sectoral analysis and published evidence confirm that town centres will need to continue to evolve and adapt to remain vital and viable locations. Section 4 discusses current research and proposed planning reform as a response to what is happening nationally.

The Evolving Role of the Town Centre

- 3.4 Retail will continue to be a vitally important footfall driver in town centres and should not be swept aside in favour of alternative town centre uses. Whilst town centres are evolving, the role of retail and retail operators should be central to any town centre strategy moving forwards. Nevertheless, trends and the need to inject life into our high streets have introduced new, multi-dimensional elements to town centres which should be promoted and incorporated – alongside retail – into emerging town centre strategies. These can be summarised as follows:
 - The development of an **'experience'** for visitors who are increasingly seeking to combine retail and leisure activities as part of a single 'going out' trip. Town centres must provide an attractive experience for visitors which the internet is unable to match. This might include specialist markets, independent cinemas, street food and seasonal events, for example.
 - Town centres acting as genuine **hubs for their communities**, and the need to create a vibrant social, commercial and cultural destination. Uses might include cultural space, co-working space, space for small and medium-sized enterprises (SME's), community facilities including libraries, education space, community halls/meeting venues.
 - Growth in **town centre living** and residential space/student accommodation – delivering footfall in the evenings and at weekends as well as during the daytime. A town centre strategy will require consideration of noise, environmental health and licensing hours in order to consider residential amenity alongside a supported evening economy.
- 3.5 An enhanced and multi-dimensional town centre strategy will require a co-ordinated and joined-up approach from all key parties in Worthing, including the Council, operators, shopping centre owners, market traders, and organisations such as the Worthing Town Centre BID. Section 4 of this report sets out details of identified recent change and trends in Worthing town centre, enabling informed conclusions as to what more is required in the future.

Economic Trends

- 3.6 The Worthing Retail and Main Town Centre Uses Study (2017) quoted Experian in respect of 'Brexit':

"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.”

Experian Retail Planner Briefing Note (November 2016)

- 3.7 Subsequent to the publication of the 2017 Study, the UK’s decision to leave the European Union (June 2016) has become an influencing factor in forecasts of economic growth. The referendum led to abrupt and severe short-term uncertainty impacting consumer confidence and spending, with direct consequent impacts on forecast expenditure growth rates for both convenience and comparison goods.
- 3.8 Experian published their most recent economic retail forecasts in February 2020, noting that the UK economy had slowed over 2019, with growth falling to a 7-year low by the end of the year. The period was dominated by heightened Brexit uncertainty and a weaker global economy. Against this backdrop, business investment declined for the second year in a row and exports remained sluggish; and consumer spending also lost momentum, reflecting low confidence and lacklustre income growth. At the end of 2019, the outcome of the December general election removed near-term political uncertainty and the risk of a no-deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans.
- 3.9 Experian record that latest indicators point to a pick-up in business confidence and investment intentions; housing market surveys suggest activity is rebounding and consumer sentiment has also improved. On the global front, Experian add that a partial easing in trade disputes and loosening in monetary policy is encouraging. Nevertheless, lingering uncertainty over the outcome of the next phase of Brexit negotiations is expected to curb the pace of any investment recovery, with significant risks remaining around the process and timetable for a trade deal to be agreed.
- 3.10 Alongside this backdrop, GDP growth is set to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years. Consumer spending growth slowed to an 8-year low of 1.2% in 2019 as consumer appetite for durables, property and cars was notably muted; and Experian confirmed that income growth averaged a disappointing 1% in 2019. Moving forwards, income growth will average 1.3% in 2020 and consumer spending will remain in sub 1.5% territory. These conservative forecasts will directly impact retail sales volume growth, which is expected to hold at a sluggish pace of 2.5% during 2020.
- 3.11 The medium-term outlook forecasts (2022-26) assumes an orderly adjustment to a new trading environment post-Brexit, but constraints will include subdued government finances, household debt and a less-expansionary financial and business services sector. For the period 2022-26, Experian forecast average GDP growth of 1.8% per annum (compared with 2.0% during 2010 to 2018); average consumer spending of 1.8%, and retail sales volume growth of around 2.7%.
- 3.12 The direct consequence for Worthing town centre is continued subdued consumer spending during the early part of the forthcoming Local Plan period. There is much economic uncertainty beyond this period, and the policy framework must be underpinned by caution in respect of town centre performance and growth, with a focus instead on consolidation and creative town centre and character area strategies.

Covid-19

- 3.13 This report has been finalised at the start of the UK’s response (March 2020) to the global Covid-19 pandemic. On Monday 23rd March 2020 the country introduced ‘lockdown’ measures and social distancing including the closure of all but essential shops and services. At the time of writing, this has



had an immediate impact on town centres and town centre businesses unable to trade, with doors now shut and with no timeline in place.

- 3.14 In a report prepared by Experian (March 2020) – ‘Covid-19, Economic Scenarios’ – it was emphasised that the outbreak of coronavirus (Covid-19) will have a considerable impact on the UK and global economies. The aim of their report is to provide a high-level steer as to the trajectories that the UK economy could follow, but note that due to the unprecedented nature of the event and absence of hard data, it is impossible to be confident of the scale and duration of the outbreak and the economic consequences of the measures to limit contagion.
- 3.15 They caveat that all forecasts are subject to greater than usual uncertainty and volatility. More optimistic scenarios range from swift rebounds in GDP and minimal long-term scarring, through to more severe shocks arising from a tightening in credit conditions and further declines in scarring. The worst case scenarios expose extended periods of stagnation and very subdued growth. Experian conclude that, at the time of writing, their view is that the minimal disruption scenarios are on-balance the more likely trajectories based on the scale of response from the UK and other governments.
- 3.16 Key influencing factors include:
- how long it takes to bring the virus under control;
 - household compliance to government interventions and social distancing;
 - the ability to respond swiftly to a future resurgence in infections and corresponding success in resources, technology and infrastructure;
 - how successful government measures are in mitigating the economic impact on households and businesses;
 - global backdrop including trade and supply chain impacts on industry; and
 - financial markets performance and credit conditions.
- 3.17 In terms of the direct implications for Worthing town centre, this will need to be monitored over the coming months with operators almost certainly experiencing administration and possibly liquidation. One short-term impact from the outset of the global pandemic has, however, been the resurgence in self-sufficiency, and producing and buying locally sourced products. In a town centre like Worthing, where independent and sustainable retailing has been on the rise, this might create substantial opportunity for a reinforced area of town centre vitality.

Online and Multi-Channel Retailing

- 3.18 Online shopping has become a firmly established method of shopping. Evidence demonstrates the continued growth of this sector in terms of those that have internet access, those that use the internet everyday, the methods and modes used to undertake such transactions, and the breadth of the population taking advantage of what is on offer, with the largest rise in the 65+ age group in recent years.
- 3.19 Considerable amounts of spend are now being diverted online, which is spend lost from ‘bricks and mortar’ town centre stores. The most popular categories are clothes and sports goods, followed by household goods, holiday accommodation, tickets for events, travel arrangements, and films and music. Four out of these six goods categories are those which have historically been purchased through physical high street stores, and the shift of spending to online platforms has resulted in a number of operators ceasing to trade or reducing their network.



- 3.20 The associated challenges for high street operators, coupled with often high levels of business rates and rental agreements, are clear to see. The overall picture reflects mixed fortunes with winners and losers on the high street with those operators at the middle to value end of the market – including Primark/H&M/Sports Direct/TK Maxx – recording strong performance levels.
- 3.21 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a ‘joined-up’ town centre ‘experience’ to lure shoppers away from the internet and instead to visit the high street and to extend their dwell time through a range of retail and leisure attractions.

Click and Collect

- 3.22 Research indicates that the click and collect market will grow by a further 46% by 2023. Click and collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of that operator. This is an important opportunity for town centres, as it can act as a footfall generator in its own right. Research demonstrates that 39% of consumers make an additional purchase in that town centre when collecting an item from a store.
- 3.23 A threat to the continued growth of click and collect is the rise of instant delivery and saver delivery services, as businesses aim to match efficient delivery options and consumer expectations. This includes same day delivery, one-hour delivery windows, and delivery passes whereby a consumer pays an annual subscription to guarantee same day, next day or timeslot delivery options. The impact of this on click and collect and associated opportunities for town centres will need to be monitored.

Commercial Leisure Sector

- 3.24 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. In many new town centre schemes, a cinema or family/casual dining has replaced retail as the ‘anchor’, driven by the growth of this sector and the need for town centres to generate a more varied visitor experience. There are signs, however, that the casual dining sector is reaching saturation and increased competition is leading to casualties. Analysts suggest that in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators’ profits.

The Convenience Sector

- 3.25 The trends being experienced in the food retailing sector were established to varying degrees at the time of the 2017 Retail Study. Food superstores are experiencing a decline in market share, small format stores of the market leaders are gaining market share, discount retailers – Aldi and Lidl – are achieving strong growth, and on-line spend is continuing to grow although not to the same extent of non-food shopping. The market leaders have pulled back on large superstore openings, and whilst small convenience stores continue to open this is not at the same pace as that seen in recent years.

Banks and Financial

- 3.26 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in centres at all levels in the hierarchy, the presence of a wide range of banks and building societies formed an important part of a centre’s mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means



of accessing bank services, particularly driven by technological advances such as online and mobile banking.

- 3.27 According to research from CACI, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017. Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in central town centre locations, which are in some instances challenging to let.

Summary

- Today, the success of town centres is less reliant on traditional retail floorspace, instead becoming more focused on ensuring a multi-dimensional offer and the creation of a visitor experience of sufficient quality to compete with internet sales.
- The town centre market has been challenging in recent years, as the UK has had to come to terms with and explore the means with which to leave the European Union. Associated economic uncertainty has led to a more reserved level of consumer spending, and this, alongside the growth in online spending, competition from click and collect, and a saturated casual dining experience, the high street has been hit hard.
- Medium to long-term forecasts conclude conditions for the high street will remain challenging, reinforcing the need for pro-active and inventive strategies for town centres and key development opportunity sites. There will certainly be no return to substantial retail growth, with a focus instead on consolidation and diversification. The current Covid-19 global pandemic and longer-term impact on the economy and town centres will need to be monitored.
- For Worthing, the retention of retail floorspace and the creation of a more diverse leisure, cultural and visitor economy – assisted by its seafront location – will be key to consolidate its position in the sub-regional network of centres performing the role of a larger town centre.



4. Current Research & Policy Reform

4.1 Since publication of the 2017 Retail Study, continued research has taken place as the sector continues to evolve in response to global forces and consumer behaviour. Experts in their field have considered and recommended solutions for the reinvention of the high street, whilst government has set out proposals for planning reform including the approach to retail and town centre uses. In this section, we summarise those relevant documents and case studies, highlighting areas of precedent that might inform the policy framework for Worthing town centre.

Current Research

The High Street Report & Future High Streets Fund (2018)

4.2 In December 2018, the Government published 'The High Street Report', setting out the findings of the 'High Streets Expert Panel' which was established earlier in 2018. The Panel, Chaired by Sir John Timpson, sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help. In introducing the report, Sir John stated:

"Town centres are evolving, and retail will not return to the high streets that existed 10 or 20 years ago. A combination of internet shopping, the convenience of out of town retailing and an exceptional number of well-established retail formats reaching the end of their commercial life, has led to a marked increase in empty shops and a decline in footfall. In completing this report, I have more hope for the future of our town centres than when we first started gathering evidence."

4.3 He added that in this report, they use the term 'town centre' rather than 'high street' because their recommendations are not just about shops and shopping. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment, medical services, and many more uses. They should also contain business premises, offices, residential including affordable housing.

4.4 The publication of the Report followed on from the announcement in the budget of Autumn 2018 of a £675m 'Future High Streets Fund', set up to help local areas respond and adapt to the changes facing town centres. The Fund will support local areas in preparing long term strategies for town centres, including funding a new High Streets Task Force to provide expertise and support to local areas. It will also co-fund investment projects in town centres, either in the form of physical infrastructure (including the regeneration of heritage high streets) or investment in land assembly, for example to support the densification of residential and workspace in town centres in places of under-used retail units.

4.5 The High Street Report provided recommendations on how the above measures should best be implemented to ensure town centres could maximise benefits:

- Making the Task Force the 'single voice' for town centres; facilitating cross-sector networking and skills building; and act as provider of access to expert help and support.
- That the Future High Streets Fund should interact with the Task Force to increase the impact of both; should fund places with community involvement in their town centre; and fund towns that demonstrate a clear vision and cross-sector leadership.
- In addition the report recommended a number of additional interventions to help facilitate town centre revitalisation, including that towns should improve the 'housekeeping' of their town centres, including creation of a 'National High Street Perfect Day'; that local authorities



should 'use initiative' to encourage landlords and tenants to think innovatively about how to use empty properties; and that towns should ensure that parking restrictions/charges are not discouraging town centre use.

- 4.6 Alongside the High Street Report, a second report 'High Street 2030: Achieving Change' was published, setting out the findings of workshops undertaken by the Institute of Place Management to collect evidence to support the development of town centre policy.

The Future of our Town and City Centres, Key Cities/Infusion, 2019

- 4.7 Instructed by 'Key Cities'¹, Infusion were asked to 'review the current state of play across our town and city centres'. The report focuses on the context in which they operate, the challenges they face, opportunities open to us and some examples of how Key Cities are responding.
- 4.8 The report starts by highlighting that over the course of the last decade, the British High Street has faced some of its biggest challenges in history. From a major economic downturn, through new retail methods and in conjunction with already-ongoing shifts in consumer spending and visiting patterns, some of the country's most recognisable names have disappeared from our city centres. Many more major retailers face huge difficulties and are undertaking seismic shifts in order to maintain their viability.
- 4.9 The report presents a strong position statement – 'with the retail sector undergoing such major changes, there is a very real threat to the existing model underpinning the vibrancy and sustainability of our city centres'. It emphasises that the retail sector has historically anchored much of our central area floor space, particularly at the visible and impactful ground floor level, and generated the bulk of footfall. With the convenience of newer methods of shopping likely to outweigh the convenience of central area shopping for the foreseeable future, it concludes that city centres will either have to shift away from a dependence on retail, or look to add an extra dimension to the retail experience offered in the city centre compared to that available online.
- 4.10 Having undertaken a detailed literature review, the report states that one constant that does carry across all contemporary research is that city centres can no longer rely on retail to be relevant. It is clear that central areas need to be diverse in the way their space is used to maintain their vibrancy, and activity in centres cannot be confined to daytimes. Ideally, city centres should not only be locations people shop in, but also eat in, drink in, work in and live in. The role of retail is still relevant and important, however, with the report emphasising that 'as well as town centres being a focal point for retail, they need to become areas in which people live, work and spend their leisure time'.
- 4.11 The research discusses a number of Case Studies demonstrating innovative approaches to city centre revitalisation, discussed in detail in the research document and summarised here:

- **Preston:** Preston had early experience of the decline of retail, when a large-scale retail-led redevelopment collapsed early this decade as it became unviable. A small City Council without a substantial amount of land assets and a lack of borrowing capacity, reliant on catalysing private sector investment and shaping projects using limited staff resources.

Council-led project included the renewal of Preston Market, and demolition of indoor market and car park to facilitate new cinema and restaurants. Private sector investment includes the re-

¹ A group of 24 mid-size cities and urban areas across the UK. Current members include Blackpool, Bournemouth, Bradford, Carlisle, Coventry, Derby, Doncaster, Gloucester, Hull, Kirklees, Medway, Newport, Norwich, Portsmouth, Preston, Plymouth, Salford, Southampton, Southend, Sunderland, Swansea, Tees Valley, Wakefield and Wolverhampton. They work to champion their places.



invention of Preston Guildhall as a leisure venue offering laser tag, bowling, crazy golf, and dedicated music venue; and conversion of former landmark post office into a luxury hotel.

- **Doncaster:** Doncaster has significant numbers of empty retail units over a large area. Rather than increase retail floorspace, the Council has devised new retail and physical regeneration strategies which sought to divide the town into zones based on function, whilst condensing the retail offer into strategic locations. This will also create space for new town centre residential developments. The council is undertaking capital developments that seek to anchor the quarters encouraging further development; accessing loan capital available at preferential rates to buy up properties with strategic importance; and considering a joint venture approach.

Projects delivered and underway include new civic offices, a new arts and theatre venue with outdoor public space and adjoining new cinema and restaurants, new cultural and learning centre, improvements to the railway station forecourt, and redevelopment of the historic Wool Market extending opening hours and encouraging special events.

- **Bournemouth:** Moving away from Development Agreements with private sector companies, the Council developed a new holistic town centre vision, working with landowners and developers to co-ordinate development across the town centre. The Council set up the Bournemouth Development Company – a local asset backed vehicle, matching the value of surplus Council land with private sector funding and expertise. The method allows the Council some control over the quality and type of schemes put forward.

Plans include the development of a masterplan for a new cultural quarter on a prominent site. No retail projects are planned – illustrating a move towards schemes such as housing and leisure, which will potentially have an economic benefit to the retail sector, but which do not seek to grow it. With £950m either invested or in the construction phase, the report concludes that Bournemouth is on the verge of transformational change. Private sector schemes include 2 hotels, a cinema with 15 restaurants, 5 student accommodation schemes and 30,000 sq ft of office accommodation.

- **Blackpool:** A town founded on the visitor economy, it was clear – when entering the 21st Century – that a shift was required in Blackpool's town centre in order to maintain its relevance in a modern world. Regeneration aimed to invest in the environment and to secure key assets; and to invest in projects bringing people in the town centre all year round. Using Business Loan funding, sale of assets and catalytic negotiations to trigger regeneration activity, projects have reached nearly £700m in investment.

Existing and pipeline schemes include the leverage of a management company for the Winter Gardens, a partnership with Merlin Entertainments to operate the Tower, £100m investment in the seafront, a new conference centre with capacity for 7,000 delegates, new 5-star quality hotels, numerous town centre public realm schemes, a new Central Business District, an extension of the Houndshell Shopping Centre to include restaurants and IMAX style cinema, and the sale of the former Central Station to private developers to create a £300m mixed-use scheme to include world class visitor attractions, retail, food and beverage, hotels and residential properties.

- 4.12 The case studies presented above, demonstrate the shift away from a dependence on retail, and – in every case – a vision to add an extra dimension to the retail experience offered, compared to that available online.



- 4.13 A similar example (separate to Key Cities) can be found in Stockton-on-Tees which was experiencing a declining town centre and a vacancy rate of 30% and growing. Recent initiatives are, however, turning fortunes around – through the purchase of key sites and assets. One of these was the purchase of the Castlegate Shopping Centre, with the overall vision to demolish the shopping centre, reduce town centre retail floorspace, and create a riverside park – opening up connectivity to the River Tees and town centre) and promenade. The Council have retained Primary Shopping Frontages, but reduced their scale.
- 4.14 The report identifies two key conclusions, the first concerning delivery arrangements and the second concerning the nature of change required. Delivery arrangements include strategic collaboration, a greater and more in-depth collation of data analysis, and better-informed organisational team structures. As has been apparent for some years, the nature of change is more than just retail, and the change in focus in recent years is now delivering an array of mixed use and other town centre use projects, re-establishing, consolidating and re-inventing town centres.
- 4.15 In terms of monitoring and planning for retail and town centres, the report points out that current health/performance checks of town and city areas are limited in what they measure, the majority of which are arguably retail focused. Evidence base reports in the form of Retail and Leisure/Town Centre Needs Studies are relevant and necessary for the purposes of development plan preparation, but this issue recognises the wider role of town centres now and in the future.
- 4.16 An additional layer of data collation and analysis is suggested to cover footfall and access/journey times to the town centre; people and place to include crime, broadband access and housing stock changes; socio-economic to include night-time economy, household income, population composition; and consumer business and retail perception to include vacancy rates, composition, and stores births/deaths.

Planning Reform

Planning Reform Consultation, October 2018

- 4.17 In October 2018, Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system; the focus of which was on supporting the high street and increasing the delivery of new homes. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.
- 4.18 Part 1 of the consultation includes proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. Government is proposing new PD rights to allow existing premises in typical high street uses to change to a wider range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.
- 4.19 With the rise of internet shopping, and the change in how people use the high street, the consultation highlights that it is timely to consider how the operation of the Use Classes Order can support greater flexibility. It notes the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands. The changes to PD and use class order which were consulted on can be summarised as follows:
- Allowing class A1, A2, A5, betting shops (SG), payday loan shops (SG) and laundrettes (SG) to change to class B1 (office) use under PD;
 - Allowing class A5 to change to class C3 (residential) under PD;



- Ensuring that the A1 (retail) use classification remains modern and current (i.e. whether the current range of goods listed as class A1 use remained fit for purpose); and
- Replacing A1, A2 and A3 with a single use class to cover shops, financial & professional services, restaurants and cafes.

4.20 Government published their response to the consultation in May 2019. This confirmed the intention to proceed and implement the first three bullet points above, but to move away from a suggested single use class which would merge A1, A2 and A3. The government response paper stated that ‘more than half of the 276 responses to question 1.7 agreed that changes to the A use classes would support the high street [and] there was considerable support to simplify the A1 use class to accommodate new and emerging retail models. There was, however, concern that:

“...merging the A1, A2 and A3 use classes would enable change to restaurant use without any local consideration of the potential impacts from longer opening hours and increased noise and odours. It could lead to a proliferation and increased concentration of restaurants, including fast food restaurants, in an area with an impact on the health of local residents and local amenity. There was also a concern that it would limit the ability of local communities to shape their high streets as set out in local or neighbourhood plans.”

4.21 Further clarification on all points are yet to be published, including reference to the prior approval of certain planning impacts. It is evident, however, that Government are intending to move towards a more flexible policy approach to the high street, particularly regarding modern business formats and the acceptance of ancillary uses within A1 shop units.

Summary

- The role of town centres as a focus for retail remains relevant and necessary in today’s market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Case studies demonstrate many examples of partnership and financial structuring to promote and implement regeneration and development projects, whether leisure and sport, hotels and offices, culture and the arts, entertainment, offices and student accommodation, and residential.
- It is apparent that these ‘extra layers’ are in addition to the core retail floorspace present in each respective case study centre but are closely connected and well integrated. Investment in a wider mix of land-uses and public realm improvements is benefitting retail floorspace and Primary Shopping Areas in the long and short term via substantially improved town centre footfall activity, and better curated and environmentally improved public spaces. There are clear examples of short-term projects to assist with ‘quick wins’ alongside longer term investment for major projects – both of which can have far-reaching positive benefits to the performance of a town centre.
- Focusing on the core retail role of town centres, recent consultation on proposed planning reform (2018) highlights the government’s intention to support the high street by speeding up and simplifying the planning system, moving towards a more flexible policy approach. Permitted development from Use Class A1 is likely to become even more relaxed with direct consequences for development plan frontage policies. The government response paper suggests, however, that they are unlikely to move towards a merged Use Class A category in order to retain a level of planning control to shape high streets. Planning reform and ‘call for ideas’ has been consulted on, but no firm changes have been finalised or implemented.



5. 2017 Study Overview

5.1 The 2017 Study examined the retail performance of Worthing town centre as a whole and across the clearly defined individual character areas. The study set out conclusions and recommendations including scope to accommodate new retail/leisure development, broader town centre strategies, and more specific local plan policies in response to local circumstances, changing market trends and national planning frameworks. This section summarises those findings before setting out in Section 6 how the retail and town centre context has since changed.

Health Check Indicators

5.2 The 2017 Study identified Worthing town centre to be performing adequately, but substantial opportunity was identified to transform Worthing to take a step change upwards in terms of the centre's attraction and competitiveness.

5.3 The analysis of the sub-regional catchment and competitor town centres concluded that there was much opportunity for Worthing town centre to increase market share in the core catchment, for both shopping and leisure purposes. This would require the strengthening of offer to compete more effectively with Brighton, the Holmbush Centre in Shoreham, Horsham, Chichester, Chichester Gate, Crawley Leisure Park, and Brighton Marina. Many of those had their own advanced investment plans, only leading to a greater level of competition for Worthing.

5.4 The number of comparison units was above the national average, but a closer qualitative analysis identified that the proportion of clothing/footwear operators was below the national average. The quality, choice and range of clothing/footwear operators was weak, and rather than attracting new retailers, Worthing had recently lost both BHS and Next. The clothing and footwear offer was mid-range including, for example, Top Shop, Monsoon/Accessorize, H&M, New Look, River Island, and Clarks, and whilst these act as important attractors and drivers of footfall, it was concluded that there was a need for a broader, higher quality comparison goods offer in the town centre.

5.5 The three main competing town centres of Brighton, Horsham and Chichester were identified to have a superior offer in this respect, having operators that Worthing should continue to aspire to attract, including East, Jigsaw, Hobbs, French Connection, White Stuff, Fat Face, Cath Kidston, Joules and Phase Eight, for example. The 2017 Study concluded that if Worthing was 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 was considered achievable over the plan period – provided the right strategy was put in place. Such operators do occupy units within frontages without a critical mass of similar retailers, based on location, quality of the environment and character of the unit.

5.6 The leisure sector was above national average in most categories, albeit the quality and scale largely fell short of competing destinations and levels expected in a sub-regional town centre. It was concluded that there was considerable room for improvement in the café, restaurant and evening economy sectors, with a particular focus on quality and those operators who trade throughout the day and into the evening thus adding vibrancy to the centre during full trading hours. A clear need for a modern multiplex cinema and boutique bowling venue was identified, alongside associated eating/drinking venues.

5.7 Evidence demonstrated that the seafront and promenade was under-utilised and infrequently used by those in the outer and core catchment area. The area was identified as a 'missed opportunity' which could make a far more positive contribution to the wider vitality and viability of Worthing town centre.



The Study concluded that the Council should continue to explore opportunities to improve connectivity through existing linkages and also key Areas of Change, including the Grafton Site.

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

Physical Composition/Layout

- 5.9 The 2017 Study concluded that the town centre has a strong physical and operational base to build upon, and that 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.
- 5.10 A key strength in Worthing was highlighted to be the clearly defined physical ‘character areas’ (nine in total) 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).
- 5.11 This was concluded to be a strong physical base to build upon, with any emerging strategy encouraged to focus on those attractive buildings of architectural interest and character. Identified town centre character areas were considered particularly important in helping to guide development in the town centre to the most appropriate locations. Policy should emphasise that planning applications must be assessed against the specific role and function of the character area in which development is proposed.

Floorspace Need

- 5.12 In respect of convenience goods, the 2017 Study concluded 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. On balance, when combined, the convenience goods floorspace in the borough was found to be 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 5.1.

Table 5.1: 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

Source: 2017 Worthing Retail and Main Town Centre Uses Study

- 5.13 The report recommended against planning for additional convenience goods growth beyond the period to 2026 given continuing uncertainties in the market. To put this convenience goods ‘need’ figure into context, we concluded that the borough should plan to accommodate an additional



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 smaller scale level of need would seem to sit comfortably with market appetite. This need has now been met by the recent planning permission for a new Aldi foodstore as part of the Teville Gateway site redevelopment.

- 5.14 In respect of comparison goods, the 2017 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. It was, however, concluded that there was 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.
- 5.15 In 2017, the town centre had a comparison goods market share of only 44.7% in Zone 1, and 24.3% across the survey area, and there were identified clear opportunities to claw back lost trade, particularly from the northern and western areas. The quantitative assessment identified need for an additional 9,197 sq.m net comparison goods floorspace by 2026 (Table 5.2).

Table 5.2: 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

Source: 2017 Worthing Retail and Main Town Centre Uses Study

- 5.16 Again, for the same reasons as for convenience goods, the study recommended against planning for development above this level (9,197 sq.m net) given uncertainties in the economy. This conclusion is reinforced by a continued evolution of town centres and growth in the introduction of alternative town centre land uses, combined with the outbreak of the Covid-19 global pandemic 2020 which may have considerable economic consequences.

Town Centre Strategy

- 5.17 The 2017 Study emphasised that 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.
- 5.18 Short terms gains and improvements – such as public realm projects – were considered equally as crucial as longer-term investment strategies. It was concluded that well positioned opportunity sites could 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.
- 5.19 Three key areas of change were identified as the priority to delivering new/additional floorspace to the town centre, including the Stagecoach Site, Grafton Site, and Union Place. The town centre strategy set out in the 2017 Study promoted the delivery of these three strategic sites alongside the retention of existing high street areas.
- 5.20 The strategy identified the new sites to deliver larger floorplates for mainstream comparison operators and other town centre/leisure uses, and existing unit configurations promoted for higher end/higher



quality operators attracted to older, more historic units. These might include, for example, Cath Kidston, Joules, Jigsaw, White Stuff, Hobbs, Molton Brown, East and JoJo Mama Bebe. Specific character area conclusions included:

- South Street/Montague Street/Grafton: higher end, quality quarter for clothing and footwear, with the Grafton also identified for good quality restaurant uses. Focus on improved quality and connectivity with the seafront, and smaller high-end boutique operators. Boutique bowling or high-end family entertainment leisure use on Grafton site.
- Union Place South/Guildbourne Centre: this wider area could sit well alongside the strategy for South Street/Montague Street/Grafton, providing an opportunity for larger box retail units to accommodate relations or new tenants. The focus of key town centre anchors and mainstream retailers. Union Place South should not form a 'leisure park', but instead form a seamless extension of the Primary Shopping Frontage synonymous with a town centre environment.
- Warwick Street: café culture/restaurant destination with associated niche/independent retailing.
- Brighton Road: niche/independent retailing area.

5.21 The 2017 Study recommended the Council commission commercial consultants to advise on this type of strategy, alongside consultation with landlords and key opportunity site developers/architects. It was emphasised that a positive outcome would only be successful through consultation and engagement of all key parties.

Shopping Frontages and Article 4 Directions

5.22 The development plan currently defines the following shopping frontages in Worthing town centre:

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

5.23 The 2017 Retail Study recommended Primary Zone A should become the Primary Shopping Frontage. Alongside this, it was recommended that Primary Zone B become Secondary Zone A, and Secondary become Secondary Zone B. The defined use classes promoted in each tier would remain the same as existing (listed above).

5.24 Some small locational changes to the adopted frontages were also recommended. These included:

- Removing a section of Montague Street from the Primary Zone A frontage; section between junction with Crescent Road and Prospect Place, but leaving Poundland, Body Shop and Card Factory within the Primary Zone A.
- Remove Buckingham Road (west side) from Secondary Frontage.
- Include Gala Bingo, Rowlands Road in Secondary Frontage.
- Re-allocate stretch of Rowlands Road to Secondary Frontage and incorporate frontage separation between Rowlands Road Neighbourhood Centre.
- Extend Secondary Shopping Frontage to include Connaught Cinema.

5.25 The 2017 Study highlighted that changes to Permitted Development rights introduced in April 2016 (see Section 2), enabled change of use proposals to bypass frontage policies – most notably in Primary



Zone A (Use Class A1 to A2 and A3), and Primary Zone B (Use Class A1 to A2). The 2017 Study recommended the introduction of Article 4 Directions to prevent the change of use from Use Class A1 to Use Class A2, A3, D2 and C3 without the need for planning permission, and provided a detailed justification. In Worthing town centre, the Study focused the recommendation on Primary Zone A and Primary Zone B.

Town Centre Investment

- 5.26 The 2017 Study concluded that Worthing was managing to position itself as a town centre which was delivering an increasingly better quality restaurant, café and bar offer within the town centre. It was emphasised that encouraging town centres to function as more than just retail locations will help drive footfall, increase dwell time and ultimately promote the viability of the town centre. A number of investment measures/projects were recognised in the 2017 Study as set out below.
- 5.27 The Montague Centre (4,650 sq.m) is a modern built partially covered shopping centre, linking Montague Street to South Street. Retailers included TK Maxx, HMV, Laura Ashley, Toy Barnhaus, Clintons and Game, but Laura Ashley has since closed and Toy Barnhaus has moved to the Guildbourne Shopping Centre. There were three vacant units at the time of the 2017 Study. Owned by NewRiver (Real Estate Investment Trust), the Montague Centre received planning permission in July 2016 (ref no AWDM/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. This was never implemented and has now expired.
- 5.28 The expired application confirmed that existing anchor stores TK Maxx, HMV and Game were to be retained, while potential future occupiers of the new A3 floorspace included Nando's, Carluccio's and Patisserie Valerie. This scheme was identified in the 2017 Study as key to transforming this part of the town centre as a new eating, drinking and shopping destination, increasing footfall and on-street activity. The proposals were considered to represent a positive development for the town centre, assisting in the Montague Centre making a more active contribution to the overall town centre offer.
- 5.29 The 2017 Study explained that it was 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 – particularly in the context of on-line shopping.
- 5.30 Worthing was taking steps to improve public realm through the 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 had also been working in partnership with West Sussex County Council to deliver town centre improvements to Montague Place. Phase 1 of the works had been completed, introducing 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.
- 5.31 Worthing Council published an 'Investment Prospectus' in 2016 to 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, identifies public realm improvements such as Montague Place, highlights the desire to improve connectivity between the town centre and seafront, and sets out how the Council and other local partners will support investment in the centre. The document is now over four years old and out-of-date in respect of investment progress since publication.
- 5.32 Worthing has had an active Business Improvement District (BID) since 2007. Now in its third term which started in 2018 and will run until 2023. The BID runs projects including the town centre



Christmas Lights, events, markets, business communication, enhanced street cleaning, the business crime reduction partnership, advertising and marketing of the town centre, shopping guides and additional signage and advertising.

Summary

- The 2017 Study identified a town centre that was performing adequately with an improved café/restaurant/bar sector. Nevertheless, it had substantial opportunity to take a step change upwards in terms of quality, range, attraction and competitiveness. Improvements to the comparison and eating/drinking sectors were emphasised as being an important part of the strategy, and a need for family entertainment and leisure facilities was identified. The town centre had recently lost BHS and Next, the seafront and promenade were under-utilised and footfall had fallen across the town centre.
- Clearly identified character areas were concluded as being a key strength in an emerging town centre strategy, whilst short term gains such as public realm projects were identified as being equally as important as the delivery of key development sites. The recommended town centre strategy included the provision of larger format units on development sites, enabling the relocation of attraction of new operators to the town centre, leaving the older and more historic units for higher end comparison retailers and smaller independent businesses and cafés/restaurants.
- The 2017 Study recommended small changes to the shopping frontages and the implementation of Article 4 Directions to prevent the change of use of A1 to A2, and in Primary Zone A from A1 to A3. No development had yet taken place on the key opportunity sites, but the Worthing Investment Prospectus had been published, public realm enhancements had been implemented in Montague Place, and a public realm and car parking strategy had been commissioned.



6. Retail and Town Centre Change

6.1 This section discusses how the retail and town centre changed since publication of the 2017 Study. The analysis focuses on the diversity of uses, retailer representation and progress in respect of the key development opportunity sites, and town centre investment and change.

Diversity of Uses

6.2 Table 6.1 below, compares the town centre composition by number of units since the previous survey in 2016. It is evident – from the final two columns – that local trends in Worthing town centre have followed those at the national level, albeit to greater extremes.

6.3 Worthing town centre has experienced a fall in convenience goods operators (3) and a percentage fall of 0.7% compared to a national average of 0.5%. The 2017 Study concluded the town centre foodstore offer to be small in scale and top-up in nature, with main foodstores being located in edge and out-of-centre locations. There have been no additions to the foodstore line-up in the town centre, which continues to be represented by Iceland, Tesco Express, M&S Simply Food and Co-Op. Iceland occupies a dated building on a key anchor gateway site between the shopping area and seafront. There is potential for this site to contribute substantially to the revitalisation of this part of the town centre leveraging in a key flagship building.

Table 6.1: Worthing Town Centre Diversity of Uses by Number of Unit 2016-2019

	No. of Units 2016	% of Total 2016	UK Average 2016	No. of Units 2019	% of Total 2019	UK Average 2019	Worthing Total Change %	UK Average % Change
Convenience	50	8.5%	8.7%	47	7.8%	9.2%	-0.7%	+0.5%
Comparison	211	36.0%	31.9%	176	29.2%	29.2%	-6.8%	-2.7%
Retail Service	73	12.5%	14.0%	88	14.6%	15.1%	+2.1%	+1.1%
Leisure Services	136	23.2%	22.4%	159	26.4%	24.5%	+3.2%	+2.1%
Financial & Business Services	58	9.9%	10.6%	52	8.6%	9.6%	-1.3%	-1.0%
Vacant	58	9.9%	11.1%	80	13.3%	11.9%	+3.4%	+0.8%
TOTAL	586	-	-	602	-	-		

6.4 The number of comparison goods retailers has fallen considerably since 2016 from 211 to 176. This represents an overall percentage decline of 6.8% compared to the national average decline of 2.7% - a steep drop despite now being in line with the national average. A closer analysis demonstrates a strong representation of more specialist and often independent operators, including antique shops, art and art dealers, booksellers, crafts china and glass, jewellery watches and silver, music and musical instruments, and second-hand goods/books. There is also an above average representation of catalogue showrooms, charity shops, department and variety stores, furniture, sports and leisure goods, soft furnishings and toys/games. General and children's clothing is below the national average, but ladies and menswear is marginally above.



- 6.5 Retail and Leisure Services have both increased in number, consistent with what is happening nationally. Retail services, which include health and beauty and opticians, increased by 2.1% compared to the national average increase of 1.1%. In this category, health and beauty is the dominant business, now occupying 68 of the 88 units (11.3% of total town centre units, compared to a national average of 9.6%). Leisure services, which include sports and leisure services, cafes, wine bars, restaurants, fast food take-aways, nightclubs, and all other eating/drinking, has grown by 3.2% compared to the national average growth of 2.1%. Representation is 1.9% above the current national average level, with a particularly strong proportion of bars and wine bars (21), cafés (40), restaurants (30) and sports/leisure facilities (9).
- 6.6 The number of vacant units has jumped from 58 in 2016 to 80 in 2019, with an overall percentage increase of 3.4% from 9.9% to 13.3%. The level was previously below the national average, but is now 1.4% above; the national average grew just 0.8% over the same time period.

Multiple Operators

- 6.7 Following the trend of a declining comparison goods sector, the level of national multiple retailers has also declined considerably over the last 20 years. Experian Goad define a multiple outlet/major retailer as follows:

“A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers are often sufficient in itself to attract consumers to a centre.”

- 6.8 Table 6.2 sets out that the number of national multiple operators has fallen by 49 over the 19-year period. As noted by Experian, these operators are important in attracting consumers to a centre, representing a growing challenge for Worthing to pro-actively encourage the re-establishment of this sector. A good quality mix of retail operator remains key to the success of the high street, but as earlier sections have highlighted, this is increasingly being seen as only part of the story, with town centres of the future now needing to add an extra dimension to the retail experience in order to remain viable.

Table 6.2: Worthing Town Centre National Multiple Outlet Representation 2001-2019

Survey Date	Multiple Outlets	Total Outlets	% of Total Outlets
January 2001	202	581	35%
December 2005	218	591	37%
August 2010	174	580	30%
February 2015	165	576	29%
August 2019	153	602	25%

Source: Experian Goad

Use Class Composition ‘Primary Shopping Frontage, Zone A’

- 6.9 Adopted Core Strategy (2011) Policy 6, Retail, confirms that Primary Shopping Frontage Zone A should be protected ‘exclusively’ for Use Class A1. Primary Shopping Frontage Zone B allows a more flexible approach to A3/A4 uses in addition to Use Class A1.
- 6.10 During March 2020, the Council prepared an analysis of Use Class composition within the Primary Shopping Frontage Zone A, the outputs of which are set out in Table 6.3 below. The analysis recorded



by address for the purposes of comparison across different parts of this key frontage, and also concluded the total figures across the full frontage for the purposes of assessing composition against adopted policy (Appendix 1).

- 6.11 The analysis demonstrates that 65% of businesses in the Primary Shopping Frontage Zone A are occupied by Use Class A1 operators. The highest level of Use Class A1 floorspace is located on Montague Street (77%), followed by the Montague Centre (45%) and South Street (35%), with some limited representation in other smaller parts of the frontage. We would advise against any further loss of Use Class A1 in this key shopping frontage. The recommended minimum percentage threshold for Use Class A1 within the Primary Shopping Frontage is set out in the final section, 'Conclusions and Recommendations' following the complete review of the vitality and viability of the town centre.
- 6.12 The Montague Centre was subject to planning permission for physical alterations and a change to operator line-up to include new restaurant operators. The current level of Use Class A1 in the Montague Centre (45%; 5/11 units) would unlikely have changed as a consequence of any redevelopment/alterations.

Table 6.3: Worthing Town Centre, Use Class A1 Analysis within Primary Shopping Frontage Zone A

Primary Shopping Frontage Zone A	Number of Units	% of Units in Use Class A1
Use Class A1	89	65%
Use Class A2	13	9%
Use Class A3	12	9%
Use Class A3/A5	1	0.7%
Use Class A5	1	0.7%
Use Class D1	2	1.4%
Sui Generis	1	0.7%
Vacant	19	14%
TOTAL	138	100%

Retailer Representation

- 6.13 The 2017 Study concluded that the quality, choice and range of comparison goods operators – and in particular clothing and footwear brands – was weak, and there was a need for a broader, higher quality comparison goods offer in the town centre. Target operators included, for example, East, Jigsaw, Hobbs, French Connection, White Stuff, Fat Face, Cath Kidston, Joules and Phase Eight. The analysis did, however, recognise the challenges to achieving a turnaround in representation of this quality as the study recorded that BHS had closed down, and Next, Laura Ashley and Mothercare were shortly to close their doors.
- 6.14 A benchmark table of 'major retailers' was included in the 2017 Study and we update it here in Table 6.4, identifying those retailers that continue to trade and those that have ceased trading at some point since 2017. Jones, Laura Ashley and Dorothy Perkins/Burttons continue to trade elsewhere in the UK, and closed their Worthing shops as part of their portfolio consolidation. It was announced in February



2020 that Beales would close 12 of their 23 department stores, including in Worthing, and the future trading status of Debenhams remains uncertain and should be monitored.

Table 6.4: Worthing Major Retailers and Change Since 2017

Major Retail Operator	Location	Trading March 2020?
Wilko	Guildbourne Centre	Yes
Debenhams	South Street	Yes
Beales	South Street	Closed
Jones Bootmakers	South Place	Closed
TK Maxx	Montague Centre	Yes
HMV	Montague Centre	Yes
Laura Ashley	Montague Centre	Closed
Topshop	Montague Street	Yes
H&M	Montague Street	Yes
Marks & Spencer	Montague Street	Yes
Monsoon/Accessorize	Montague Street	Yes
Thorntons	Montague Street	Yes
Sports Direct	Montague Street	Yes
New Look	Montague Street	Yes
River Island	Montague Street	Yes
Argos	Montague Street	Yes
Dorothy Perkins/Burtons	Montague Street	Closing Down
Clarks	Montague Street	Yes
Holland and Barratt	Montague Street	Yes
The Body Shop	Montague Street	Yes
Waterstones	Montague Place	Yes

6.15 Within the independent comparison goods sector, Bert's - a popular homestore and gift shop - has opened in Worthing town centre, within the Secondary Shopping Frontage of Montague Street. Bert's Homestore, which has two stores in Brighton and a third in Hove, is well-known locally for its home accessories such as kitchenware, cookery books and retro gifts, and will be a strong addition to the shopping offer and retail attraction in this part of town.

Leisure Uses

6.16 As noted in Section 5, the 2017 Study concluded that there was considerable room for improvement in the café, restaurant and evening economy sectors, with a particular focus on quality and those operators who trade throughout the day and into the evening thus adding vibrancy to the centre during full trading hours. This sector has seen a good improvement since this time, with a large number of good quality cafés and small bars entering the market; and consistent with policy this has largely been in the Primary Zone B and Secondary Shopping Frontages.

6.17 These include HalloumiLicious in Warwick Lane, Bungaroosh café/bistro in Bath Place, Finch on Brighton Road, Larder on Montague Street and Kaspas Desserts on Chapel Road. Pitch restaurant opened in May 2019 by the Masterchef 2018 Champion on Warwick Street, and a number of small bars including Worthing Gin in the Guildbourne Centre, the Whiskey Rooms on Montague Street, and



The Old Bike Store Micro Brewery on Brighton Road have added a level of independent quality to the leisure offer, opening in secondary shopping frontages. The Jungle nightclub opened recently on Chatsworth Road just behind the Grafton shopping centre, a re-branding of the previous Liquid & Oxygen nightclub, with opening hours until 3am.

- 6.18 The Primary Shopping Frontage has, however, also seen the introduction of new A3 café/restaurant uses, contrary to current development plan policy. These have included Honeybee Donuts and Delightful Desserts on South Street and Auntie Bunny’s Hut within the Montague Quarter. There has been increasing pressure for A3 uses within this Primary Shopping Frontage in recent years – particularly given the fall in Use Class A1 comparison as documented earlier in this section.
- 6.19 A further high-quality coffee shop – Boston Tea Party – has announced it will shortly open in Worthing town centre. With 23 shops across the UK, they market themselves as a small family owned café chain serving ethically sourced and affordable goods made on site daily. The high-quality operation has been voted in the top 25 places for brunch in the Times and is the first café nationally to ban single use cups. The retailer will contribute further to the heightened quality of café venues in Worthing in recent months.
- 6.20 Worthing will shortly have two ‘Escape Room’ entertainment venues. Escape Rooms are physical adventure games in which players/teams enter a room and have to solve a series of puzzles within a 60-minute time limit. They are marketed as ‘immersive, team-building experiences, where visitors are the main characters in a mysterious story’. ‘Time Lock’ opened on Church Walk with the junction of Ham Road, on the eastern outskirts of the town centre; and is open 10am-8pm except on Tuesdays and Wednesdays when the venue is closed. A second Escape Room attraction will open in the Guildbourne Centre in Spring 2020.

Seafront – Marine Parade

- 6.21 In March 2020, the Council undertook a survey audit of uses currently present on the seafront – Marine Parade. The survey area included businesses on Marine Parade between Montague Place and eastwards towards Steyne Gardens; details of the audit are set out in Table 6.5 below. The Marine Parade survey area predominantly lies outside of allocated shopping frontages, aside from a short stretch between Bath Place and South Street, which is allocated as Primary Frontage Zone B. Just outside but adjoining the survey area, M&S food has an entrance to the west of Montague Place on Marine Parade.

Table 6.5: Worthing Seafront, Use Class Analysis

Seafront Frontage	Number of Units	% of Total
Use Class A1	4	21%
Use Class A2	0	0%
Use Class A3	5	26%
Use Class A4	4	21%
Use Class D1	1	5%
Use Class D2	1	5%
Sui Generis	1	5%
Vacant	3	17%
TOTAL	19	100%



6.22 As you would expect in this location, predominantly outside a policy controlled allocation, the uses are varied. Businesses within Use Class A1 include a fishing tackle and bait shop, skateboard/scooter shop and a tattoo parlour. The highest proportion of businesses are in the Use Class A3 category and include Harry Ramsdens, and a selection of other restaurants. In other use class categories, The Cowshed and Goose are pubs/bars (A4), Bar 42 and Escape are bar/nightclubs (A4), and there is also the Dome Cinema, Casino Amusement Arcade and the Marine Dental Practice. There are three vacant units on this stretch of Marine Parade (17%).

Town Centre Investment / Change

6.23 Section 2 of the 2017 Study provided details of the Worthing development opportunity sites, Areas of Change 1-12, but identified the three key Areas of Change that – sequentially – should form the priority for new/additional town centre retail floorspace. We provide an update to each of these three sites below:

- **Stagecoach Site (Area of Change 2):** The bus operator is continuing to consider options for relocation but has not yet found an acceptable alternative site to relocate their operations. One possible option for relocation identified in the Core Strategy which is currently being explored is the Council owned land at Decoy Farm. Discussions are ongoing. The site was included as a potential Area of Change within the (Reg 18) Draft Worthing Local Plan Consultation (Oct 2018).
- **Grafton Site (Area of Change 3):** The comprehensive redevelopment of this town centre and sea front site aims to deliver a mixed-use scheme with new homes, retail, leisure and car parking. The development has potential to deliver a new street linking Montague Street to the seafront and Worthing Lido. Site was included as a potential allocation within the (Reg 18) Draft Worthing Local Plan Consultation (Oct 2018). Discussions and options for development are on-going, and the final decisions in response to the car parking study will have important implications for the future strategy.
- **Union Place South (Area of Change 4):** Union Place is a long-standing development opportunity site and was included in the Worthing Investment Prospectus. Acquired by the Council in 2018, they have since entered into a land pooling agreement for the site with partners London and Continental Railways, and have jointly prepared a development strategy for the site. Public consultation on the evolving design plans for Union Place took place in November 2019, which include proposals for nearly 200 homes, commercial space, a hotel, cinema extension to the Connaught Theatre, car park and public realm enhancements.

6.24 Two further sites were considered key town centre gateway sites:

- **Aquarena Site (Area of Change 1):** This site comprised the former Aquarena swimming pool and is located outside of the designated town centre boundary to the east. The site is recognised as a gateway site into the town centre being located on Brighton Road; and the adjoining Splashpoint Leisure Centre which opened in May 2013 had already addressed the policy requirement for the delivery of a new public swimming pool.
Planning permission was subsequently granted on 10th March 2017 for 141 apartments in two buildings ranging from 4 to 15 storeys, a commercial unit (641 sq m unspecified use class), 138 sq m pavilion/café, public open space and underground public and private car parking. The site has been implemented and will not be included in the emerging Local Plan as a key development site.
- **Teville Gate (Area of Change 5):** This site is located just south east of Worthing railway station, acting as a landmark gateway to the town centre in the north. The majority of the site was



purchased in 2015 by Mosaic Global Investment, and in 2018 demolition of the multi-storey car park was complete. A planning application for 'Station Square' (Ref: AWDM/0325/19) was submitted in February 20019 seeking permission for 378 residential units, an 83 bedroom hotel, an Aldi foodstore (1,852 sq m GEA), a Pure Gym, and 999 sq m of retail, restaurant and café uses (Use Class A1/A2/A3/A4/A5). The submission drawings suggest six Use Class A units. The application was approved in March 2020.

- 6.25 The Council's encouragement of town centre living is reflected in a number of recent planning approvals. In January 2019, for example, planning permission was granted (**Ref: 1529/18**) for the reconfiguration of **19-23 South Street** which includes the Beales Department store (Block 7 and 8 below), and the Beales Furniture store (Block 6 below).



- 6.26 The application proposed the reduction of the Beales department store by converting retail space in the two storey Block 7 to individual shop units, and the change of use of the former Beales furniture store Block 6 to a range of A1, A2 and A3 uses. By adding additional floors and converting existing storage and retail space a total of 45 residential apartments were granted planning permission. Beales subsequently went into administration in January 2020, and announced closure of the Worthing store in February 2020, which introduced a significant risk to the implementation of the redevelopment and reconfiguration.
- 6.27 It has, however, since been announced that an innovative, community-focused department store – '15:17' has signed a 10-year lease for the vacant unit – the company's latest acquisition of vacant department store space. Since 2018, the company has acquired sites formerly held by companies including BHS, House of Fraser and now Beales. Alongside typical retail offerings, 15:17's department stores are known to include fitness classes, cafés, soft play areas and opticians in a response to the shift in focus on the high street from conventional retail to leisure experiences. It is also understood that, alongside the commitment from 15:17 Ltd, a further 4,000 sq ft of retail space has been let to seven independent retailers, and negotiations are taking place for a serviced office provider to take on the remaining 7,500 sq ft of the second floor vacated by Beales.
- 6.28 Elsewhere, in May 2019, the Council granted planning permission for the demolition of **105-109 Montague Street**, and redevelopment comprising a new four-storey building on an enlarged footprint



covering the service yard (**Ref: 1763/18**). Previously occupied by Poundland and located within Primary Zone A shopping frontage, the development would comprise 375 sq m of retail space at ground floor level, and 26 one-, two- and three-bedroom residential units at upper levels.

- 6.29 Proposals have been emerging in recent months for a new **Worthing Integrated Care Centre (WICC)** on an under-utilised site forming part of the Civic Quarter. The Civic Quarter lies on the northern edge of the main shopping area and is currently occupied by the Town Hall, Assembly Halls, Museum, Library, Civic Offices, Law Courts and Surface car parks. The proposals will bring together a number of services and service providers under one roof, with the aim of creating an integrated model of care; services will include GP Surgery, community services, mental health services, drug and alcohol dependency services, dentistry, pharmacy, open plan office spaces and multi-storey car park.
- 6.30 As noted in earlier sections, The Montague Centre was subject to planning permission (**ref no AWDM/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. The permission expired in July 2019.

Worthing Town Centre Car Parking Strategy

- 6.31 In order to free up key development sites – and in particular – The Grafton site – the Council must consider the required strategy around car parking capacity to meet current and future demand in Worthing town centre. The Worthing Town Centre Car Parking Strategy was prepared to consider options around the demolition, refurbishment and increased capacity of car parks, and their effect on the town's supply and demand.
- 6.32 The closure of the Grafton multi-storey car park and the refurbishment of Buckingham Road car park were incorporated as fixed certainties in all options. The closure of Grafton MSC would lead to the loss of 431 car parking spaces, but the refurbishment of Buckingham Road would not increase car parking capacity in that location. Increased capacity through decking at the Civic Centre surface level and Lyndhurst Road surface level would add c.250 car parking spaces but not meet the shortfall resulting from the closure of Grafton MSC.
- 6.33 The only option to increase car parking capacity above current levels is identified to be through the demolition and re-build of the High Street MSC. This is, however, a risky option for wider town centre vitality and viability in the context that this option would lead to a shortfall in parking for 3 years to allow for demolition and construction. It would also require significant financial commitment. The final car parking option is yet to be finalised, but should be monitored given the varying levels of impact on the footfall and overall performance of the town centre within the different options presented.

Summary

- Since publication of the 2017 Study, Worthing has experienced mixed fortunes in terms of performance and investment. The number of comparison goods operators has fallen at a faster rate than the national average, and the vacancy rate has increased substantially, now recording a higher level than the national average. The level of national multiple retailers has fallen consistently since 2005, including the recent loss of Beales, Jones Bootmakers, Laura Ashley and Dorothy Perkins/Burtons. The rate and level of loss of such brands is a concern to the overall health and performance of Worthing town centre. It is encouraging to report that innovative, community-focused department store 15:17 has recently signed to occupy the vacant Beales unit alongside seven independent retail operators.



- The number of leisure services, and most notably eating/drinking operators, has increased at a faster rate than the national average, with a strong influx of good quality independent and chain businesses. This is a particularly positive contribution to the vitality and viability of Worthing town centre. These have largely located in secondary frontages, but the pressure for change of use from A1 in Primary Shopping Frontages is evident with the introduction of three café/restaurants in this area. Use Class A1 currently stands at 65% within the Primary Shopping Frontage Zone A.
- There have been no new high-end cinemas or bowling complexes, but two Escape Rooms are open/opening in and on the edge of the town centre. In terms of key development sites, proposals for Union Place South are moving forwards with a full development team, and Aquarena has planning permission for a mixed use residential led scheme and small level of ground floor commercial. A planning application for Teville Gate has been approved and town centre living is being promoted, evidenced in planning permissions for the reconfiguration of the vacant Beales and Poundland blocks. A new integrated Care Centre is being brought forward on the Civic Quarter.
- The town centre remains vulnerable to retail decline, but investment is now being brought forward which will eventually introduce a greater layering of uses than just retail. The café sector is booming, and new independent and smaller businesses are of a good quality. The objective should be to continue to invest and enhance the range and quality of Use Class A1 operators alongside the improvement and growth of other sectors across the town centre which either happening naturally or initiated through pro-active and planned investment.



7. Conclusions & Recommendations

- 7.1 Drawing on the analysis and findings in previous sections, we set out our conclusions and recommendations for Worthing town centre in respect of the overall strategy and more detailed development plan policies.

Conclusions

- 7.2 The retail and town centre policies set out in the Core Strategy (2011) pre-date revisions to permitted development rights (2016) allowing the conversion of Class A1 units to Use Class A2, A3 (150 sq m), D2 (200 sq m) and C3 (150 sq m) without planning permission. Whilst the NPPF has dropped reference to Primary and Secondary Shopping Frontages, the PPG emphasises that these are still useful tools and can be justified in supporting the vitality and viability of town centres. The evidence presented in this report confirms that such frontages remain relevant in Worthing.
- 7.3 National trends, research and case studies all support the growth and consolidation of multi-dimensional town centres. Following the early decline of traditional retail, multi-dimensional was primarily seen as introducing eating/drinking and leisure facilities, but this market soon became saturated. A greater potential was soon recognised for higher density mixed-use development to maximise redevelopment opportunities and to realise truly multi-dimensional town centres. Land uses now include residential, offices, conference facilities, hotels, flexible and co-working spaces, education and community meeting venues, health and well-being, and student accommodation, as well as higher quality leisure and entertainment facilities.
- 7.4 The level of 'need' for additional convenience goods floorspace in Worthing has now been met by the recent planning permission for a new Aldi foodstore as part of the Teville Gateway redevelopment. We conclude there is no further need for additional convenience goods floorspace over the plan period; and this should be re-visited and monitored in future evidence base studies. The level of 'need' for additional comparison goods floorspace across the borough is forecast to be around 9,000 sq m net. Given national trends, and the recorded decline of comparison goods floorspace across the UK, this is likely to represent a maximum/upper threshold. The current Covid-19 global pandemic is contributing substantially to economic uncertainty, and the full implications for local economies and town centres are yet to be realised but should be monitored carefully.
- 7.5 Rather than planning to build substantial additional retail floorspace, the focus should be on accommodating this residual comparison goods need within an improved trading performance of existing floorspace. This will occur through the preparation of a town centre investment prospectus/town centre strategy, continued investment in the environment and public realm, a growing collaboration between town centre partners, businesses and the local community, and consequent enhanced footfall. The Council should continue to be cautious about out-of-centre development proposals which could have a catastrophic impact on town centre trade retention.
- 7.6 The oversupply of retail floorspace is now widely recognised in town centres across the UK. Whilst some sites are ripe for high density development, the opportunities for open space and visitor enjoyment of natural resources is recognised on others. Stockton-on-Tees Borough Council has, for example, purchased one of the major indoor shopping centres with a vision to demolish to create a park linking the town centre with the River Tees funded by peripheral redevelopment (see footnote ²). The Grafton site presents the strongest opportunity in the town centre to create 'space' and to link the beach/seafront with the wider town centre. The incorporation of a green park area/open space and sightlines should be considered.

² <https://www.stockton.gov.uk/news/2020/february/plans-unveiled-for-stockton-town-centre-after-massive-response-to-public-consultation/>



- 7.7 In response to national high street trends including a growth in vacancy rates, a challenged retail sector, and falling footfall, the government has started considering a greater degree of flexibility, consulting on a raft of planning reform measures to re-ignite high streets more swiftly. This includes introducing permitted development from Use Class A1 to Use Class B1 (office) in addition to A2/A3/D2 and C3. The government response paper suggests, however, that they are unlikely to move towards a merged Use Class A category; stating that a level of planning control to pro-actively shape high streets must be retained. Government recognises the need to plan pro-actively for town centres through policy control.
- 7.8 It should also be emphasised when considering emerging town centre strategies, that whilst town centre markets are changing, the long-term implications are yet to be fully realised. The Government's suggested planning reform and 'call for ideas' has been consulted on, but no firm changes have been finalised or implemented, and the Council are only just realising investment and implementation of strategic sites. Whilst local authorities should respond to national trends and local circumstances, it is premature to introduce a far-reaching laissez-faire overhaul of town centre policy in Worthing. Continued monitoring and future evidence base studies should keep this under review, but in the meantime, the need for a sound policy framework, strong frontage policies, and a clear and robust statement of permitted uses in different locations will be required over the Local Plan period.
- 7.9 The market trend and visitor expectations for multi-dimensional town centres must be a consideration, but it should not over-ride the importance and retention of Use Class A1 in Worthing Town Centre which should remain a priority. It is this foundation that will enable the town centre to retain and grow its shopping market share, level of attractiveness and footfall within the sub-regional hierarchy of town centres moving forwards.
- 7.10 Nevertheless, it is clear that Worthing town centre can no longer rely on retail alone to establish a strong and vibrant future. The comparison goods category in Worthing town centre has experienced a substantial decline, and national multiple operators have been leaving the town for a number of years. The evidence has identified a number of positive trends in recent months, most notably the introduction of a strong selection of good quality independent and small business café and restaurant operators, micro-breweries and gin distilleries, exercise hubs and art shops/galleries drawn to the attractive range of lanes and seaside location. Two Escape Room entertainment leisure venues have also opened, and a re-branded night-club has invested in an existing facility on Chatsworth Road.
- 7.11 The Council have pro-actively responded to the challenges presented on the high street, building on the success of the 2016 Investment Prospectus. Change and investment takes time but these are beginning to be realised, evidenced in the number of town centre residential units being granted planning permission through key site redevelopment; the advanced development proposals for Union Place South; planning permission for Aquarena – a key gateway site; continued work into public realm and car parking strategies; and ongoing work to bring forward Teville Gate and redevelopment of the Guildbourne Shopping Centre.
- 7.12 There has been little progress to date on the Grafton site, which is key to realising the overall aspiration for Worthing town centre, which is a stronger link to the seafront and retail/town centre circuits in this core part of the town centre. The outputs from the car parking strategy will be instrumental in taking this site to the next stage of development, whilst case studies such as Stockton-on-Tees should be considered as part of future development proposals.
- 7.13 Based on the conclusions drawn above, recommendations for policy frontage allocations are set out below, alongside advice to implement Article 4 Directions as the only method to enforce and protect allocated policy frontages.



Key Recommendations

Primary Shopping Frontage

- WTC1:** Rename 'Primary Zone A' to 'Primary Shopping Frontage' to ensure consistency with NPPF definitions.
- WTC2:** Consolidate the Primary Shopping Frontage, removing 80-108 (inclusive) and 111-135 Montague Street. The vacant Poundland unit at 105-109 Montague Street is considered to represent the western-most 'anchor' store and has planning permission for a large unit of 373 sq m. This should be retained at Primary Shopping Frontage.
- WTC3:** A policy priority to prevent fall in number of Use Class A1 comparison goods retailers. Policy should retain 65% minimum threshold for Use Class A1 in Primary Shopping Frontages, irrespective of unit size. Clarify that the percentage relates to number of units to retain and ensure a strong mix and diversity of retail operator irrespective of floorspace and length of frontage. The 65% threshold is consistent with national averages in the context that 35% of town centre units are – on average – occupied by leisure and financial/business services.
- WTC4:** Provided minimum Use Class A1 threshold is retained, clarify that only Use Class A1 and Use Class A3 are allowed in Primary Shopping Frontages. These uses ensure full daytime trading footfall, avoiding daytime closing hours.
- WTC5:** In Primary Shopping Frontages it is recommended that non-Use Class A1 operators are not allowed to locate in adjacent units, and that at least three Use Class A1 shops separate those individual non-Use Class A1 units that are allowed under the threshold policy.

Secondary Shopping Frontage Zone A

- WTC6:** Rename 'Primary Zone B', 'Secondary Shopping Frontage Zone A'.
- WTC7:** Policy to confirm acceptable uses restricted to Use Class A1, A3 and A4.
- WTC8:** Add 80-108 and 111-135 Montague Street to Secondary Shopping Frontage Zone A.
- WTC9:** Remove west side of Buckingham Road.

Secondary Shopping Frontage Zone B

- WTC10:** Rename 'Secondary Area', 'Secondary Shopping Frontage Zone B'.
- WTC11:** Policy to confirm acceptable uses restricted to Use Class A1, A2, A3, A4 and D2.
- WTC12:** Extend frontage to include Gala Bingo on Rowlands Road.
- WTC13:** Extend frontage along Rowlands Road up to and including units to Wordsworth Road. Units to the east of Wordsworth Road should form the Rowlands Road Neighbourhood Centre.
- WTC14:** Extend frontage to include Connaught Cinema on Union Place.

Article 4 Direction: Primary Shopping Frontage

- WTC15:** Introduce Article 4 Direction across full Primary Shopping Area preventing permitted development to A2, A3 (units below 150 sq m) and D2 (units below 200 sq m).
- WTC16:** Monitor government planning reform suggesting extending current permitted development to include change of use from Use Class A1 to Use Class B1 (office). Introduce Article 4 preventing this in the Primary Shopping Frontage if changes are introduced.



Article 4 Direction: Secondary Shopping Frontage Zone A

WTC17: Introduce Article 4 Direction across full Secondary Shopping Frontage Zone A preventing permitted development to A2 and D2 (units below 200 sq m).

Other Town Centre Recommendations

WTC18: 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 [planning permission has been granted];
- **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, larger floor plate units, extended cinema provision 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/high end entertainment ‘destination’. Strong links between ‘Commercial Heart’ and Seafront, and located within the Primary Shopping Area. Introduction of a green open space. 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.

WTC19: Update the Town Centre Investment Prospectus/prepare a town centre wide (including Areas of Change) ‘Feasibility and Investment Plan’, ensuring a comprehensive approach supporting the emergence of the town centre strategy and 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.

WTC20: Consider the provision of a sufficient supply of suitable sites within the Primary Shopping Area and Areas of Change to accommodate an upper threshold of 9,000 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.



- WTC21:** Continue to leverage investment in the environment and public realm, and introduce shop front policies to ensure maintained and consistent standards across the town centre. Environmental quality is key to encouraging visitors and businesses, with consequent direct impact on footfall.
- WTC22:** Plan to accommodate an extended cinema provision, 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, with the vision to implement an extension to the current Connaught Theatre.
- WTC23:** Continue to support the Dome Cinema as an independent/art-house destination, alongside an extended cinema provision elsewhere. Stronger town centres are able to provide a dual, complementary offer, and Worthing should aspire to retain this breadth of offer.
- WTC24:** 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).
- WTC25:** 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.
- WTC26:** Introduce a seafront frontage policy allocation, ensuring the continued representation of Use Class A1, A3, A4 and D2, emphasising that planning policy will resist closed and inactive street frontages. Policy should protect against the loss of retail and leisure uses, and prevent any change of use to Use Class A2, A5, C3 and D1. An Article 4 Direction should be considered as a necessary planning tool for proactive management.
- WTC27:** Monitor and analyse car park pricing, usage and capacity and any changes over time that may directly affect visitation and dwell time.
- WTC28:** 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.
- WTC29:** 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 500 sq.m gross and above.
- WTC30:** 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.
- WTC31:** Prepare Use Classes Audit annually within each clearly defined character area. This will help monitor change, monitor robustness and relevance of frontage policy framework, and address planning applications for change of use.
- WTC32:** Core Strategy 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'. 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.



Appendix 1

Primary Shopping Frontage Audit

Worthing Town Centre Audit, Primary Shopping Frontage Zone A
On-Street Survey, 19th March 2020 [Sorted by Use Class]

	Retail Fascia	Description	Category	Use Class	UNIT	ADDRESS
1	Alleyoops	Bicycles, Scooters and Skateboards	Comparison	A1	Unit 2	Marine Parade
2	Waresellers	Booksellers, Crafts, Toys	Comparison	A1	28	Montague Street
3	The Works	Booksellers, Crafts, Toys	Comparison	A1	95	Montague Street
4	Miles	Camping and Leisure Goods	Comparison	A1	78	Montague Street
5	Mountain Warehouse	Camping and Leisure Goods	Comparison	A1	35	Montague Street
6	Trespass	Camping and Leisure Goods	Comparison	A1	27/25	Montague Street
7	Argos	Catalogue shop	Comparison	A1	97/101	Montague Street
8	Oxfam	Charity shop	Comparison	A1	96a	Montague Street
9	Marie Curie	Charity Shop	Comparison	A1	88	Montague Street
10	RSPCA	Charity Shop	Comparison	A1	135	Montague Street
11	Shaker	Charity shop	Comparison	A1	131	Montague Street
12	Books the Chemist	Chemist & Drugstore	Comparison	A1	48/52	Montague Street
13	Love Yours	Clothing	Comparison	A1	72	Montague Street
14	New Look	Clothing	Comparison	A1	68	Montague Street
15	Monsoon & Accessorize	Clothing	Comparison	A1	36/34	Montague Street
16	River Island	Clothing	Comparison	A1	79	Montague Street
17	H&M	Clothing	Comparison	A1	31/33	Montague Street
18	Top Shop/Top Man	Clothing	Comparison	A1	23/21	Montague Street
19	Peacocks	Clothing	Comparison	A1	9 to 11	Chapel Road
20	Edinburgh Woolen Mill	Clothing	Comparison	A1	50/52	South Street
21	T.K.Maxx	Clothing	Comparison	A1	13	Montague Centre
22	Game	Computer games	Comparison	A1	3	Montague Centre
23	The Body Shop	Cosmetics and Beauty	Comparison	A1	80	Montague Street
24	How Bazaar	Crafts, Gifts, China and Glass	Comparison	A1	96b	Montague Street
25	Debenhams	Department store	Comparison	A1	14/20	South Street
26	Cex Exchange	Entertainment Exchange	Comparison	A1	103A/103	Montague Street
27	Clarks	Footwear	Comparison	A1	83/81	Montague Street
28	Shoe Zone	Footwear	Comparison	A1	29	Montague Street
29	Collingwood and Batchelor	Furniture	Comparison	A1	108/100	Montague Street
30	Card Factory Cards	Greeting Cards	Comparison	A1	84/82	Montague Street
31	Clinson Cards	Greeting Cards	Comparison	A1	58	Montague Street
32	Cards Direct	Greeting Cards	Comparison	A1	69	Montague Street
33	Clinson Cards	Greeting Cards	Comparison	A1	8	Montague Centre
34	H&F Haberdashery	Haberdashery	Comparison	A1	133	Montague Street
35	Marks & Spencer	Home & Wear	Comparison	A1	59/51	Montague Street
36	Beris	Homestore	Comparison	A1	76a	Montague Street
37	Robert Dyas	Homestore	Comparison	A1	28/30	South Street
38	Clairs	Jewellery and Accessories	Comparison	A1	93	Montague Street
39	Jewellery	Jewellery, Watches & Silver	Comparison	A1	26	Montague Street
40	G&A	Jewellery, Watches & Silver	Comparison	A1	208	Montague Street
41	Pandora	Jewellery, Watches & Silver	Comparison	A1	43	Montague Street
42	H Samuel	Jewellery, Watches & Silver	Comparison	A1	191/7	Montague Street
43	F Hinds	Jewellery, Watches & Silver	Comparison	A1	4	Barclays Bank Bldgs
44	Jeremy Silverthorne	Jewellery, Watches & Silver	Comparison	A1	46	South Street
45	HRV	Musicians	Comparison	A1	485	Montague Centre
46	Bright House	Rent to Buy Furniture, Appliances & Computing	Comparison	A1		Montague Street
47	Sports Direct	Sports and Leisure Goods	Comparison	A1	66	Montague Street
48	JD Sports	Sports and Leisure Goods	Comparison	A1	65/63	Montague Street
49	WH Smith	Stationers	Comparison	A1	2 and 4	Montague Street
50	Surfs Up	Telephones and Accessories	Comparison	A1	92	Montague Street
51	Q2	Telephones and Accessories	Comparison	A1	70	Montague Street
52	3 Mobile	Telephones and Accessories	Comparison	A1	38	Montague Street
53	Carphone Warehouse	Telephones and Accessories	Comparison	A1	30	Montague Street
54	EE	Telephones and Accessories	Comparison	A1	18	Montague Street
55	Vodafone	Telephones and Accessories	Comparison	A1	14	Montague Street
56	Fone World	Telephones and Accessories	Comparison	A1	15	Montague Street
57	Superdrug	Toiletries, Cosmetics and Beauty	Comparison	A1	40 - 44B	Montague Street
58	Sainsbury	Toiletries, Cosmetics, Household	Comparison	A1	54	Montague Street
59	Vape Store	Vape Shop	Comparison	A1	86	Montague Street
60	Poundland	Variety Store	Comparison	A1	56	Montague Street
61	Wilko	Variety Store/Household	Comparison	A1	1 to 5	Guldbourne Centre
62	Bon Marche	Clothing	Comparison	A1	91/89	Montague Street
63	Select	Clothing	Comparison	A1	7	Montague Centre
64	Hosier Shops	Footwear	Comparison	A1	67	Montague Street
65	Every Cloud	Vape Shop	Comparison	A1	44	South Street
66	Wares Bakers	Bakery	Convenience	A1	64	Montague Street
67	Griggs	Bakery	Convenience	A1	111	Montague Street
68	Thorntons	Confectioners	Convenience	A1	49	Montague Street
69	Mr Simms	Confectionery (Sweet Shop)	Convenience	A1	94	Montague Street
70	Global Food Market	Convenience Foodstore	Convenience	A1	1	Barclays Bank Bldgs
71	Iceland	Convenience Foodstore	Convenience	A1	01-Apr	Pavilion Parade
72	Lords	Convenience Store	Convenience	A1	115	Montague Street
73	Holland & Barrett	Health Food	Convenience	A1	60	Montague Street
74	Grape Tree	Health Food	Convenience	A1	56 - 58	South Street
75	Chapel News	Newsagents	Convenience	A1	2	Barclays Bank Bldgs
76	Gentlemen's Barbers	Barbers	Retail Service	A1	2	Liverpool Buildings
77	Rush	Hairdressers	Retail Service	A1	8	Montague Street
78	Centrestage	Hairdressers	Retail Service	A1	8	South Street
79	Toni & Guy	Hairdressers	Retail Service	A1	54	South Street
80	Amplify	Hearing Service	Retail Service	A1	33	South Street
81	Vision Express	Opticians	Retail Service	A1	32	Montague Street
82	Specsavers	Opticians	Retail Service	A1	61	Montague Street
83	Thomas Collison	Opticians	Retail Service	A1	1	Liverpool Buildings
84	Timpson	Shoe Repairs	Retail Service	A1	16	Montague Street
85	irepair	Telephones and Computer Repairs	Retail Service	A1	24	Montague Street
86	My Phone	Telephones and Computer Repairs	Retail Service	A1	20A	Montague Street
87	Self and Repair	Telephones and Computer Repairs	Retail Service	A1	47/45	Montague Street
88	TUI	Travel Agents	Retail Service	A1	62	Montague Street
89	Hays Travel	Travel agents	Retail Service	A1	586	Barclays Bank Bldgs
90	Halifax	Bank	Financial & Business Services	A2	17	South Street
91	Naxos	Bank	Financial & Business Services	A2	27	South Street
92	Lloyds	Bank	Financial & Business Services	A2	41/43	South Street
93	Barclays	Bank	Financial & Business Services	A2	78B	Barclays Bank Bldgs
94	TSB	Bank	Financial & Business Services	A2	10	Montague Street
95	Nationwide	Building Society	Financial & Business Services	A2	7 to 11	Montague Street
96	Yorkshire Building Society	Building Society	Financial & Business Services	A2	7	Chapel Road
97	Boom Credit Union	Credit Union	Financial & Business Services	A2	129	Montague Street
98	Matthew Anthony	Estage Agent	Financial & Business Services	A2	6	South Street
99	A Plan	Insurance Broker	Financial & Business Services	A2	48	South Street
100	Worthing Cash Centre	Pawnbrokers	Financial & Business Services	A2	119	Montague Street
101	Beauty Heaven	Beauty Salon	Retail Service	A2	90	Montague Street
102	Beauty and Nails	Beauty Salon	Retail Service	A2	13	Montague Street
103	Coffee Me	Cafe	Leisure Service	A3	98	Montague Street
104	Cafe Nero	Cafe	Leisure Service	A3	108/11	South Street
105	Esquire	Cafe	Leisure Service	A3	25	South Street
106	Starbucks	Cafe	Leisure Service	A3	22/26	South Street
107	Delightful Desserts	Cafe/Desserts	Leisure Service	A3	40/42	South Street
108	Honeybee Donuts	Cafe/Restaurant	Leisure Service	A3	12	South Street
109	Subway	Fast food/takeaway	Leisure Service	A3	3	Barclays Bank Bldgs
110	Issa Sushi	Restaurant	Leisure Service	A3	31	South Street
111	The Coffee House	Restaurant	Leisure Service	A3	3	Liverpool Buildings
112	Aunt Bunny	Restaurant/Cafe	Leisure Service	A3	10	Montague Centre
113	Poppins	Restaurant/Cafe	Retail Service	A3	127	Montague Street
114	Cow Shed	Restaurant/Bar	Leisure Service	A3	Unit 1	Marine Parade
115	Jimmy Chopp	Frish & Chip	Leisure Service	A3AS	113	Montague Street
116	McDonalds	Fastfood Takeaway	Leisure Service	A5	8 TO 11	Liverpool Road
117	Cloud Gallery	Art Gallery	Leisure Service	D1	6	Montague Centre
118	Montague Gallery	Art Gallery	Leisure Service	D1	9	Montague Centre
119	Ladbrooks	Betting Shop	Leisure Service	Sui Generis	02-Apr	South Street
120	VACANT	VACANT	VACANT	VACANT	96	Montague Street
121	VACANT	VACANT	VACANT	VACANT	78a	Montague Street
122	VACANT	VACANT	VACANT	VACANT	76/74	Montague Street
123	VACANT	VACANT	VACANT	VACANT	22	Montague Street
124	VACANT	VACANT	VACANT	VACANT	10	Montague Street
125	VACANT	VACANT	VACANT	VACANT	6	Montague Street
126	VACANT	VACANT	VACANT	VACANT	123/125	Montague Street
127	VACANT	VACANT	VACANT	VACANT	121	Montague Street
128	VACANT	VACANT	VACANT	VACANT	117	Montague Street
129	VACANT	VACANT	VACANT	VACANT	105-109	Montague Street
130	VACANT	VACANT	VACANT	VACANT	87/85	Montague Street
131	VACANT	VACANT	VACANT	VACANT	19/23	South Street
132	VACANT	VACANT	VACANT	VACANT	35/39	South Street
133	VACANT	VACANT	VACANT	VACANT	4	Liverpool Buildings
134	VACANT	VACANT	VACANT	VACANT	32/36	South Street
135	VACANT	VACANT	VACANT	VACANT	38	South Street
136	VACANT	VACANT	VACANT	VACANT	01-48	Montague Centre
137	VACANT	VACANT	VACANT	VACANT	11	Montague Centre
138	VACANT	VACANT	VACANT	VACANT	12	Montague Centre



Appendix 2

Seafront, Marine Parade Audit

Worthing Town Centre
Seafront, Marine Parade Audit, March 2020

	Retail Fascia	Description	Category	Use Class	Unit	Address
1	Fishing Tackle and Bait	Fishing Shop	Comparison	A1	26	MARINE PARADE
2	Alley Oops	Skateboard/Scooters	Comparison	A1	2	MARINE PARADE
3	Tattoo Parlour	Tattoos	Comparison	A1	27	MARINE PARADE
4	Stagecoach Ticket Office	Ticket Office	Comparison	A1	20	MARINE PARADE
5	Harry Ramsdens	Fish & Chip Restaurant	Leisure Service	A3	32	MARINE PARADE
6	Casa Ciro	Italian Restaurant	Leisure Service	A3	30-31	MARINE PARADE
7	Beach House	Restaurant	Leisure Service	A3	23	MARINE PARADE
8	Brios	Restaurant	Leisure Service	A3	18	MARINE PARADE
9	Boutique	Turkish Restaurant	Leisure Service	A3	40	MARINE PARADE
10	Bar 42	Bar/Club	Leisure Service	A4	42	MARINE PARADE
11	Escape Bar	Bar/Club	Leisure Service	A4	37-39	MARINE PARADE
12	Cowshed	Pub/Bar	Leisure Service	A4	31	MARINE PARADE
13	Goose	Pub/Bar	Leisure Service	A4	19	MARINE PARADE
14	Residential	Residential	-	C3	41	MARINE PARADE
15	Marine Dental	Dentist	Retail Service	D1	36	MARINE PARADE
16	Dome Cinema	Cinema	Leisure Service	D2	21-22	MARINE PARADE
17	Casino	Amusement Arcade	Leisure Service	Sui Generis	33-34	MARINE PARADE
18	VACANT	VACANT	VACANT	VACANT	29	MARINE PARADE
19	VACANT	VACANT	VACANT	VACANT	28	MARINE PARADE
20	VACANT	VACANT	VACANT	VACANT	24-25	MARINE PARADE