

Chichester Retail and Main Town Centre Uses Study 2018 Final Report

Chichester District Council

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Contents

1.0	Introduction	1
	Overview	1
	Report Structure	2
2.0	Policy Context	3
	National Planning Policy	3
	Local Planning Policy	6
3.0	Current Provision and Trends	9
	Introduction	9
	Retail Trends	9
	Expenditure Growth	9
	Centres in Chichester District and the Surrounding Area	14
4.0	The Need for Retail Uses	20
	Introduction	20
	Methodology and Base Data	20
	Existing Spending Patterns	24
	Capacity for Future Convenience Goods Floorspace	27
	Capacity for Future Comparison Goods Floorspace	28
	Qualitative Need for Retail Floorspace	29
5.0	The Need for Food/Beverage Uses	36
	Introduction	36
	Mix of Uses	36
	Food and Beverage Expenditure	37
	Future Capacity for Food and Beverage Floorspace	39
	Qualitative Need	41
	Conclusions	42
6.0	The Need for Other Town Centre Uses	43
	Introduction	43
	Commercial Leisure Uses	43
7.0	Chichester City Centre	54
	Chichester Key Functions	54
8.0	Other Centres in the District	66

	Selsey	66
	East Wittering	68
	Bracklesham	68
	Southbourne	70
	Tangmere Audit	70
9.0	Planning Policy Analysis	71
	Introduction	71
	The Hierarchy of Centres	71
	Impact Thresholds	73
	Town Centre Boundary and Primary Shopping Area	74
	The Appropriate Mix of Uses	75
	Edge and Out of Centre Sites	78
10.0	Accommodating Growth	79
	Introduction	79
	Floorspace Projections	79
	Vacant Units	80
	Development Opportunities	80
11.0	Conclusions and Recommendations	84
	Chichester District's Need	84
	Strategy for Accommodating Growth	85
	Policy Review	86
	Future Monitoring	87

Appendices

Appendix 1: Study Area

Appendix 2: Convenience Goods Capacity

Appendix 3: Comparison Goods Capacity

Appendix 4: Food/Beverage Capacity

Appendix 5: Household Survey Results

Appendix 6: Potential Development Sites

Glossary

Benchmark Turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services

Non-retail uses classed as A1 in the Use Classes Order, such as hairdressers, travel agents and dry cleaners.

Class A2

Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3

Commercial units classed as restaurants and café food outlets within the Use Classes Order.

Class A4

Commercial units classed as public houses or bars within the Use Classes Order.

Class A5

Commercial units classed as fast food or takeaway food outlets selling cooked hot food.

Class C3 Residential

“Dwelling house”, as a principal or secondary residence.

Convenience Goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison Goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail planning information.

Food and Beverage

Class A3, A4 and A5 food and drink outlets, but not food and grocery items including in convenience goods.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,250 town centres across the country.

Gross floorspace

Total external floorspace including exterior walls.

Higher order comparison goods

Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to travel further to purchase these items.

Javelin Venuescore

A database of retail locations that enables the user to rank and sort the UK's shopping venues against a range of different criteria incl. market size, location type, market position and sector.

Lower order comparison goods

Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceuticals and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a town centre or shopping facility.

Multiple traders/outlets

National or regional 'chain store' retailers.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

The Requirements List

A published source of information providing known retail and leisure operators' space requirements in towns across the country.

Zone A Rent

The annual rental charge per square foot for the first 20-foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.

1.0 Introduction

Overview

- 1.1 Lichfields has been commissioned by Chichester District Council to prepare a Retail and Main Town Centres Uses Study. The study has been prepared in accordance with the National Planning Policy Framework (NPPF, 2012) relating to the need to ensure the vitality of town centres (paragraph 23), strategic priorities for retail, leisure and commercial development (paragraph 156) and the evidence to assess the need for economic development (paragraph 161). The study has also been prepared in accordance with the Planning Practice Guidance (PPG).
- 1.2 The study will inform future planning policy on retail and town centre matters in the District, together with a wider strategy for the future of the District's centres to 2036. It will also form part of the Council's evidence base in progressing the review of the adopted Local Plan. Any evidence base study carried out at the current time needs to be cognisant of some significant recent changes:
- 1 **Changes in policy** - the NPPF heralded the biggest single change in national planning policy in a generation, and it raises the bar for local authorities in terms of the positive approach and a greater emphasis on the deliverability of plans.
 - 2 **Changes in the economy** - there has been significant uncertainty relating to town centres and the retail sector, particularly following the EU Referendum vote. The study must adopt up-to-date and authoritative economic forecasts.
 - 3 **Changes in market** - the above issues have had an impact on the commercial property market dynamics, both in terms of local demand and on the overall ability of developers and firms to access finance.
- 1.3 The key objective of the Chichester Retail and Main Town Centres Uses Study is to provide a robust and credible evidence base to inform the Council's work on the review of the adopted Local Plan, considering changes since previous evidence was prepared. The updated Local Plan will reflect the emerging housing, employment, retail and leisure needs up to 2036.
- 1.4 The Retail and Main Town Centre Uses Study is based on up to date and sound research. The study establishes existing shopping patterns, based on sound empirical evidence and comprehensive customer survey research, including both customers who use facilities in the District and those who shop elsewhere.
- 1.5 This report provides a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within Chichester District. It provides a description of existing retail facilities within the District, and it identifies the role the centres play in meeting the needs of customers. The assessment of need includes both food and non-food retailing and eating/drinking away from the home. The study includes an assessment of:
- 1 recent changes in circumstances and shopping patterns, not least the effects of the recession, the requirements of the NPPF and changes to permitted development rights;
 - 2 the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2036;
 - 3 the existing network of centres and retail boundaries/frontages, including advice as to whether any changes are required; and
 - 4 development plan policies, allocations and recommendations on how each centre can develop its role.

Report Structure

- 1.6 Section 2.0 summarises the relevant policy context and Section 3.0 describes recent trends and current provision in the District. Sections 4.0, 5.0 and 6.0 provide need assessments for retail and other main town centre uses. Section 7.0 sets out a health check appraisal of Chichester city centre. An audit of other centres at Selsey, East Wittering/Bracklesham, Southbourne and Tangmere is provided in Section 8.0. Section 9.0 provides an analysis and review of the existing relevant local planning policies. Section 10.0 sets out the strategy for accommodating growth identified within the study. Section 11.0 sets out the recommendations and conclusions.

2.0 Policy Context

National Planning Policy

- 2.1 The previous 2010 Retail Study prepared by DTZ update was based on the guidance set out in PPS4 which was superseded by the NPPF (published by the Department for Communities and Local Government on 27 March 2012). It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).
- 2.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):
- 1 local planning authorities should positively seek opportunities to meet the development needs of their area;
 - 2 local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - 3 any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework when taken as a whole; or
 - 4 specific policies in this Framework indicate development should be restricted.
- 2.3 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).
- 2.4 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:
- 1 proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
 - 2 take account of the different roles and character of different areas, promoting the vitality of main urban areas; and
 - 3 encourage the effective use of land by reusing land that has been previously developed (brownfield land), if it is not of high environmental value.
- 2.5 Local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20). In terms of plan making, the NPPF (para. 161) states that local planning authorities should use their evidence base to assess:
- 1 the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development;
 - 2 the role and function of town centres and the relationship between them, including any trends in the performance of centres; and
 - 3 the capacity of existing centres to accommodate new development.

- 2.6 In terms of retail development, the NPPF (para. 23) states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:
- 1 recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - 2 define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - 3 define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - 4 promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - 5 retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;
 - 6 allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
 - 7 allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
 - 8 set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
 - 9 recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
 - 10 where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.
- 2.7 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.
- 2.8 The sequential approach test indicates that main town centre uses should be in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).
- 2.9 The NPPF states that local planning authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 26). This should include an assessment of:

- 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 wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.10 Where an application fails to satisfy the sequential test, or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

2.11 The PPG indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

2.12 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

NPPF Consultation

2.13 The Government has published its draft revision of the NPPF in March 2018. This consolidates a series of proposals that have been made in the last two and half years, and which have been included in various consultation documents.

2.14 In relation to town centres, the revised draft does not change the overall thrust of the NPPF, although there are some important modifications. These changes are logical points of clarification that address areas of dispute which have arisen in recent years.

2.15 It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities will no longer be required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses must however still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

2.16 The consultation proposals were expected to address inconsistencies in the application of the sequential test in recent appeal and legal decisions. There is no mention of the need to disaggregate application proposals onto several separate town centre or edge of centre sites, which is consistent with recent Secretary of State decisions and how the Courts have clarified the meaning of the sequential test.

2.17 A key suggested change (para. 87 – change underlined) is "*main town centre uses should be located in town centres, then edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered*". The explanatory document indicates that the reason for this suggested change is to avoid prejudicing more central sites that are in the pipeline but not available straight away. The definition of a "reasonable period" is still open to debate, but logically this period should relate to the likely timetable for delivery of the application proposal.

2.18 The need to assess the impact of out of centre office proposals on town centres has been removed. The Government points out that the sequential approach adequately controls inappropriate office proposals.

2.19 The proposed changes to the effective use of land will also have implications for town centres, by promoting higher density development, including development of under-utilised land and buildings. The potential development of town centre service yards and car parks is another

proposal introduced, but it may create challenges, recognising there is a fine balance between providing new facilities and maintaining high levels of accessibility, to enable town centres to compete effectively.

General Permitted Development Order

- 2.20 Recent changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures could change the composition of town centres across the country, i.e. the amount of Class A1 space is likely to reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but conversely it could have an impact on the ability of operators to find space in areas where demand is higher.

Local Planning Policy

- 2.21 The Chichester Local Plan: Key Policies 2014-2029 ('Local Plan') was adopted in July 2015. The Inspector required the Council to complete a review within five years to make sure sufficient housing would be planned to meet the needs of the area. This work will form the Chichester Local Plan Review 2035. Retail capacity projections also need to be updated and rolled forward, to account for the latest trends in home/online shopping and recent changes in the composition of uses within town centres.
- 2.22 **Local Plan Policy 2** (Development Strategy and Settlement Hierarchy) identifies the locations where sustainable development, infrastructure and facilities will be accommodated which in terms of scale, function and character, support the role of the settlements outlined in table 2.1 below.

Table 2.1 Chichester District Settlement Hierarchy

Hierarchy	Settlement	Role
Sub-Regional Centre	Chichester City	providing a wide range of higher order services and facilities - employment, shopping, education, health, entertainment, arts and culture - serving a wide catchment area extending outside the District.
Settlement Hub	East Wittering/Bracklesham, Selsey, Southbourne, Tangmere	secondary service centres, providing a reasonable range of employment, retail, social and community facilities serving the settlement and local catchment areas.
Service Villages	Birdham, Bosham/Broadbridge, Boxgrove, Camelsdale/Hammer, Fishbourne, Hambrook/Nutbourne, Hermitage, Hunston, Kirdford, Loxwood, North Mundham/Runcton, Plaistow/Ifold, Stockbridge, West Wittering, Westbourne, Westhampnett, Wisborough Green	villages that either provide a reasonable range of basic facilities (e.g. primary school, convenience store and post office) to meet the everyday needs of local residents, or villages that provide fewer of these facilities but that have reasonable access to them in nearby settlements.

Source: Chichester Local Plan Key Policies 2014-2029

- 2.23 The Site Allocations Submission Development Plan Documents identifies East Wittering as a Local Centre. Selsey is also identified as a Local Centre within the Selsey Neighbourhood Plan.

- 2.24 **Local Plan Policy 10** (Chichester City Development Principles) indicates new development, infrastructure and facilities will be planned in Chichester city that enhance the city's role as a sub-regional centre and visitor destination, contribute to meeting local needs, and conserve and enhance the city's historic character and heritage. This will include provision for development and proposals that support and strengthen the vitality and viability of the city centre and its role as a shopping/visitor destination and a place to live. The policy also seeks to enhance the city's existing heritage, arts and cultural facilities and entertainment and leisure offer, including the evening economy.
- 2.25 **Local Plan Policy 27** (Chichester Centre Retail) outlines the approach to main town centre uses in Chichester city centre's primary and secondary shopping frontages, including the approach to the control of non-A1 uses.
- 2.26 Within the primary shopping frontages in Chichester Shopping Centre additional non-shopping (A1) uses will be granted at ground floor level where all the following criteria are met:
- 1 additional uses (Class A2 - A5) results in no more than 25% of the total of all street frontages in non-shopping (A1) uses;
 - 2 additional use results in no more than two non-shopping (A1) uses adjacent to each other or a total of 15 metre continuous non-retail frontage (whichever is the greater);
 - 3 the proposal does not prejudice the effective use of the upper floors; and
 - 4 shop window and entrance is provided or retained which relates well to the design of the building and to the street-scene and its setting.
- 2.27 Proposals for town centres uses at ground level within use classes A, B1 (a), C1, D1 and D2 of the Use Class Order will be granted within the secondary shopping frontages where the proposal, either cumulatively or individually is considered to have no adverse impact on the vitality or viability of the area. The change of use of ground floor premises to other uses, including residential, will be granted where all the following criteria are met:
- 1 no more than 75% of the whole of the shopping frontage is in non-shopping (A1) use;
 - 2 the proposal does not result in the loss of existing residential accommodation;
 - 3 the proposal does not prejudice the effective use of the upper floors; and
 - 4 a shop window and entrance is provided or retained which relates well to the design of the building and to the street-scene and its setting.
- 2.28 Additional retail development will be granted provided that all the following criteria are met:
- 1 the floorspace size reflects the character and scale of the development in the existing shopping centre;
 - 2 development respects the character of the existing shopping centre in terms of design, scale and materials; and
 - 3 the proposal relates appropriately to the existing shopping frontage.
- 2.29 Proposals for residential, leisure and office use above premises in the city centre will be supported to help increase its vitality.
- 2.30 **Local Plan Policy 28** (Edge and Out of Centre Sites – Chichester) sets out the Council's approach to development in edge and out of centre locations. It sets out that proposals outside the central retail area for non-food retail and food retail, including extensions, will be granted if it can be demonstrated that all the following criteria have been considered:

- 1 the proposal does not have a significant adverse impact on the vitality and viability of the central shopping area, either as an individual development or cumulatively with similar existing or proposed developments;
- 2 the proposed retail development on out of centre sites will need to demonstrate that no suitable site can be found, firstly within the existing town centre or, secondly, on the edge of the centre;
- 3 proposals over 2,500 sq.m are accompanied by a full assessment of the potential impact on town centres and nearby centres;
- 4 the type of goods sold and the form of shopping unit proposed could not be conveniently accommodated within the existing shopping centre or where suitable sites and premises are not available within the centre or edge of centre sites;
- 5 the shopping units (including any created by the subdivision of existing units) are of a minimum size of 1,000 sq.m gross floorspace;
- 6 the types of goods sold and the facilities provided complement those provided in the existing retail centre;
- 7 servicing and customer traffic can be safely and conveniently accommodated by the surrounding road network and does not add to traffic generation in the town centre;
- 8 the proposal is easily accessible by the highway network and public transport and includes provision for access by cycle and on foot; and
- 9 the design of the buildings will not detract from the character or appearance of the site or the surrounding area.

2.31 **Local Plan Policy 29** (Settlement Hubs and Village Centres) relates to settlement hubs and village centres (East Wittering and Selsey). It states proposals for development will be encouraged where they would contribute to the vitality and viability of the retail centres of East Wittering and Selsey and are of an appropriate scale and function. Where sites cannot be found within the centres of these settlements, consideration will be given to proposals on edge of centre sites.

2.32 In the established shopping centres and other existing local centres, parades and isolated shops, retail uses will be protected. Planning permission for other uses will be granted where it has been demonstrated that all the following criteria have been met:

- 1 the proposal does not result in the reduction of shopping facilities; or
- 2 there is no demand for continued retail use and the site has been marketed effectively for such use or no local need has been identified.

3.0 Current Provision and Trends

Introduction

- 3.1 This section outlines national trends that are likely to influence the need for retail and town centre facilities in Chichester District and the prospects for attracting new investment. It also summarises current provision within the District, which provides the baseline for future projections in later sections of this report.

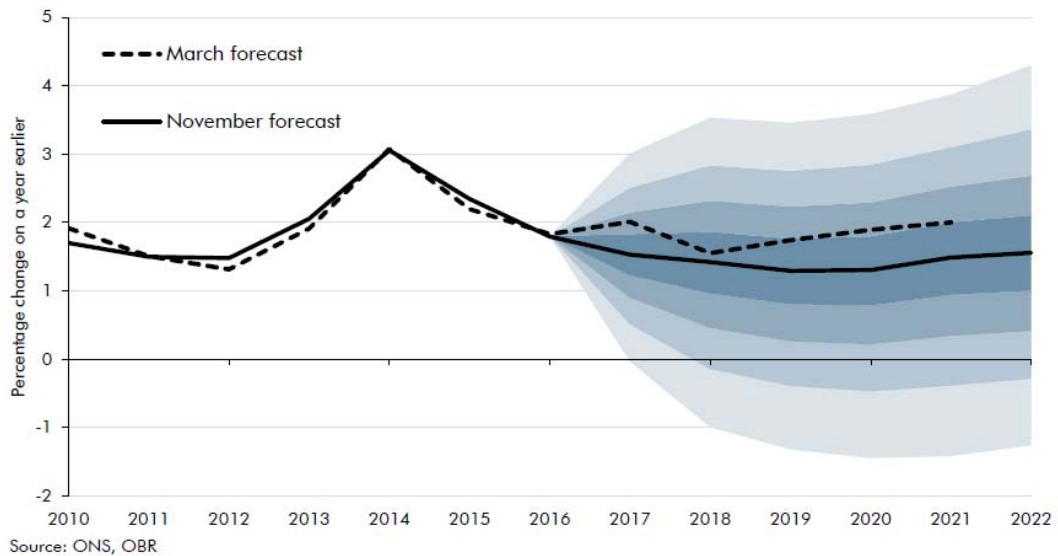
Retail Trends

- 3.2 The economic downturn had a significant impact on the retail and leisure sectors. Many national operators failed (e.g. Austin Reed, BHS, Comet, HMV, JJB Sports, Jessops, Maplin, Clinton Cards, Woolworths, MFI, Toys R Us, Land of Leather, Borders, Game, Firetrap, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. The latest operators to experience difficulties include House of Fraser, New Look, Carpetright, Prezzo, Chimichanga, Strada, Byron, Marks & Spencer and Jamie Oliver, which indicate that market conditions are still challenging.
- 3.3 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.
- 3.4 Assessing future expenditure levels within this study needs to consider the likely speed of the economic recovery, particularly in the short term (2018 to 2021). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long-term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national trends within the retail sector is set out below.

Expenditure Growth

- 3.5 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the impact of the EU Referendum is expected to result in slower growth in the short term and home shopping/internet spending is expected to grow at a faster rate than traditional forms of shopping.
- 3.6 After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014 and 2% in 2015. The Office for Budget Responsibility's (OBR) latest (November 2017) figures for GDP show that real GDP growth averaged 0.3% a quarter in the UK in the first three quarters of 2017, down from 0.5% in the second half of 2016. OBR's March 2017 forecasts assumed that real GDP growth would slow in the second quarter of 2017 as higher inflation squeezed real incomes. The latest ONS data however indicates that this slowdown came in the first quarter of 2017 – one quarter earlier than assumed in March 2017, but one quarter later than assumed in the November 2016 forecast. Real GDP growth was therefore slightly weaker over the first half of 2017 than expected in March 2017.
- 3.7 The average forecast for GDP growth in 2017 is 1.6% which is slightly higher than the current forecast of 1.5%. The average forecast for GDP growth in 2018 is 1.4%. The average forecast for 2019 is 1.7%, while the average for 2020 is 2%. The blue shading in figure 3.1 shows 20% probability bands around the projection line.

Figure 3.1 Real GDP Growth Fan Chart (November 2017)



Source: OBR Economic and Fiscal Outlook – November 2017

- 3.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the last economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. The growth in the demand for floorspace is expected to slow, particularly in the short term. These national trends are anticipated to be mirrored in Chichester District.
- 3.9 For convenience goods, Experian’s forecasts (December 2017) anticipate limited growth (0.1% per annum) from 2020. For comparison goods, higher levels of growth are expected in the future (3.2% per annum from 2020), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian’s latest national growth rate recommendations are consistent with these past trends.
- 3.10 Experian’s latest expenditure projections consider the implications of Brexit, indicating this has created major uncertainties regarding the long-term outlook for the UK economy. Experian’s baseline forecasts reflect a small downgrade in the UK’s long-term projections for trade, investment and GDP. However, the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.2% to 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 15 (December 2017) states:

“The expansion in comparison goods volumes, averaging 3.2% per head to 2036, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.”

Convenience goods enjoyed the strongest rise in the decade during 2016, buoyed by the overall buoyancy in spending. Growth has since slowed but remains above the long-term trend over the period 1997 to 2015 averaging – 1.2% per head a year. Our central forecast has a renewed squeeze in convenience goods in the short term, before sales per head growth settles at 0.2% a year from 2020 to 2036.”

3.11 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. Because of these trends, the national average shop vacancy rate (based on Goad plan data) has increased from around 10% in 2005 to circa 14% in 2012. Vacancy rates have gradually recovered to 11.2% in 2017.

3.12 Data obtained from Goad (May 2017) and during centre visits carried out in February 2018, demonstrated that there were 47 vacant Class A1-A5 shop units within Chichester, Selsey, East Wittering and Bracklesham. This equates to an overall vacancy rate of 7.8%, which is lower than the Goad national average of 11.2% (2017). Selsey had the highest vacancy rate (12%), slightly above the national average, but we understand the vacancy has fallen recently too under 6%. Conversely the full impact of the new out of centre Asda store may not have been fully felt and this may increase the vacancy rate. Overall the vacancy figures suggest centres in the District are performing well despite challenging market conditions.

New Forms of Retailing

3.13 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to influence retailing in the high street and from traditional stores. National trends within this sector will have implications for retailing within Chichester, because they will affect the amount of expenditure growth that will be potentially available to support development and the strength of operator demand for new floorspace.

Special Forms of Trading/Home Shopping

3.14 Recent trends suggest continued strong growth in this sector. Experian’s Retail Planner Briefing Note 15 (December 2017) states:

“The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 16.5% of total retail sales....

...The rising share of internet sales in total retail transactions dominates the picture of SFT. Based on data for the first ten months of the year, internet sales’ share of total retail is expected to come in at roughly 14% in 2017, against 4.7% in 2008.

...non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. According to Internet World Stats there, as of June 30 2017, there were an estimated 62.1 million internet users in the UK (representing 94.8% of the population). Growth of the internet user base will thus be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching almost 20% by 2022 rising to 20.5% by the mid-2030s.”

- 3.15 This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.
- 3.16 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate online sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in online sales may not always mean there is a reduction in the need for retail floorspace.
- 3.17 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

Food Store Operators

- 3.18 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 3.19 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 88% between 2011 and 2015, compared to the number of larger format stores which increased by 37% over the same period. The number of Little Waitrose trebled between 2011 and 2015.
- 3.20 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customer's shopping habits.
- 3.21 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Chichester District with Lidl and Aldi stores in Chichester. The discount sector is actively expanding and Aldi/Lidl may look for further opportunities in Chichester District in the future.

Comparison Retailers

- 3.22 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a few mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores

across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct have also expanded out-of-centre. To date, this has not been evident in Chichester District, however at Portfield Retail Park John Lewis at Home has opened a large store. We understand the BHS out of centre store is due to be occupied by The Range, with a new mezzanine floor.

- 3.23 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is reasonably well represented in Chichester including at Portfield Retail Park, Barnfield Retail Park and the Bognor Road trading estate, but these operators primarily sell bulky comparison goods that complement the city centre, rather than non-bulky good such as fashion on and clothing. At present there are limited retail warehouse voids in Chichester and this should restrict pressure to extend the range of non-bulky goods. The Range is expected to move into the former BHS unit. The composition of retail parks in Chichester should continue to be monitored and controlled if necessary.
- 3.24 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres, such as Chichester. Although given the historic nature of Chichester city centre, many of the existing units are narrow fronted and the unit configuration could constrain operator demand. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.
- 3.25 The continuation of these trends will influence future operator requirements in Chichester District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units. However, smaller vacant units could still be attractive to independent traders and non-retail services.

Charity and Discount Shops

- 3.26 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within Class A1, the same category as other shops. In many centres, charity shops have occupied vacated shop premises during the recession. This trend is evident in Selsey. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-Retail Services

- 3.27 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has also raised concerns amongst local planning authorities, and has resulted in a change to permitted development rights to control the growth of these uses in town centres.
- 3.28 Recent changes to the GPDO may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures could change the composition of town centres; the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages. Conversely, it could have an impact on the ability of operators to find space, in areas where

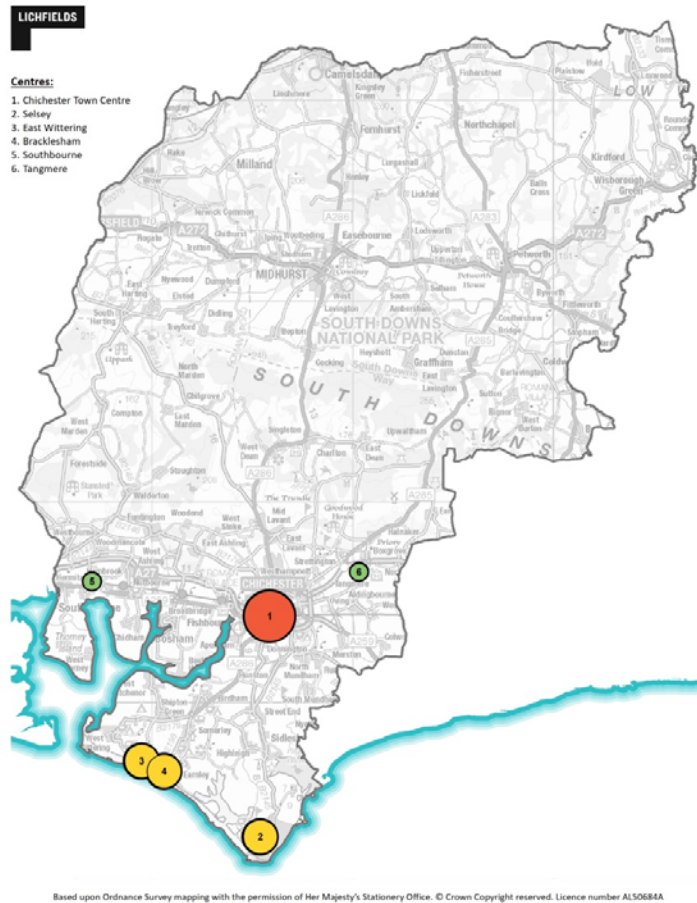
demand is higher. Given that the vacancy rate is relatively low in Chichester the latter may be the main concern.

- 3.29 In our view it is unlikely that these temporary changes will have a significant impact on Chichester city centre, East Wittering/Bracklesham and Selsey, because the current vacancy rates are relatively low.
- 3.30 These trends including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate increased to over 14% during the last recession, but has not returned to pre-recession levels (around 8%). The national vacancy rate remains around 11%, and therefore a cautious approach to future growth is required.
- 3.31 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

Centres in Chichester District and the Surrounding Area

- 3.32 Chichester District is bound by several local authority areas, namely Waverley to the north, East Hampshire and Havant to the west, and Horsham and Arun to the east. Part of the District is within the South Downs National Park authority area.
- 3.33 The Chichester District Local Plan sets out a settlement hierarchy of Chichester District (see Table 2.1 above). The location of the main centres in Chichester, Selsey, East Wittering, Bracklesham, Southbourne and Tangmere are shown in Figure 3.2 below.

Figure 3.2 Main Centres in Chichester District

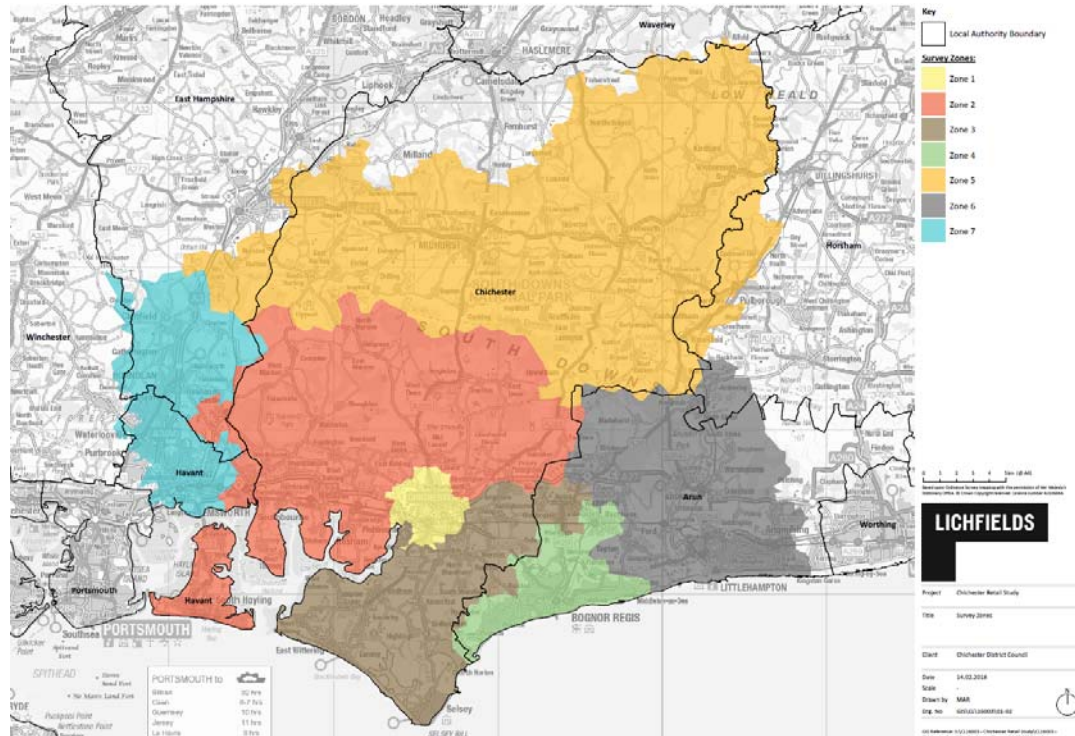


Source: Lichfields

3-34

The quantitative analysis in this report is based on a defined study area (see Figure 3.3 below or Appendix 1), which covers the primary catchment areas of shopping destinations within Chichester District. These catchment areas extend beyond the District boundary into neighbouring authorities to the east and west. The study area is sub-divided into 7 zones for more detailed analysis. The zones broadly reflect the catchment areas of the main centres within the District.

Figure 3.3 Study Area Zones (see Appendix 1 for larger plan)



Source: Lichfields

Venuescore

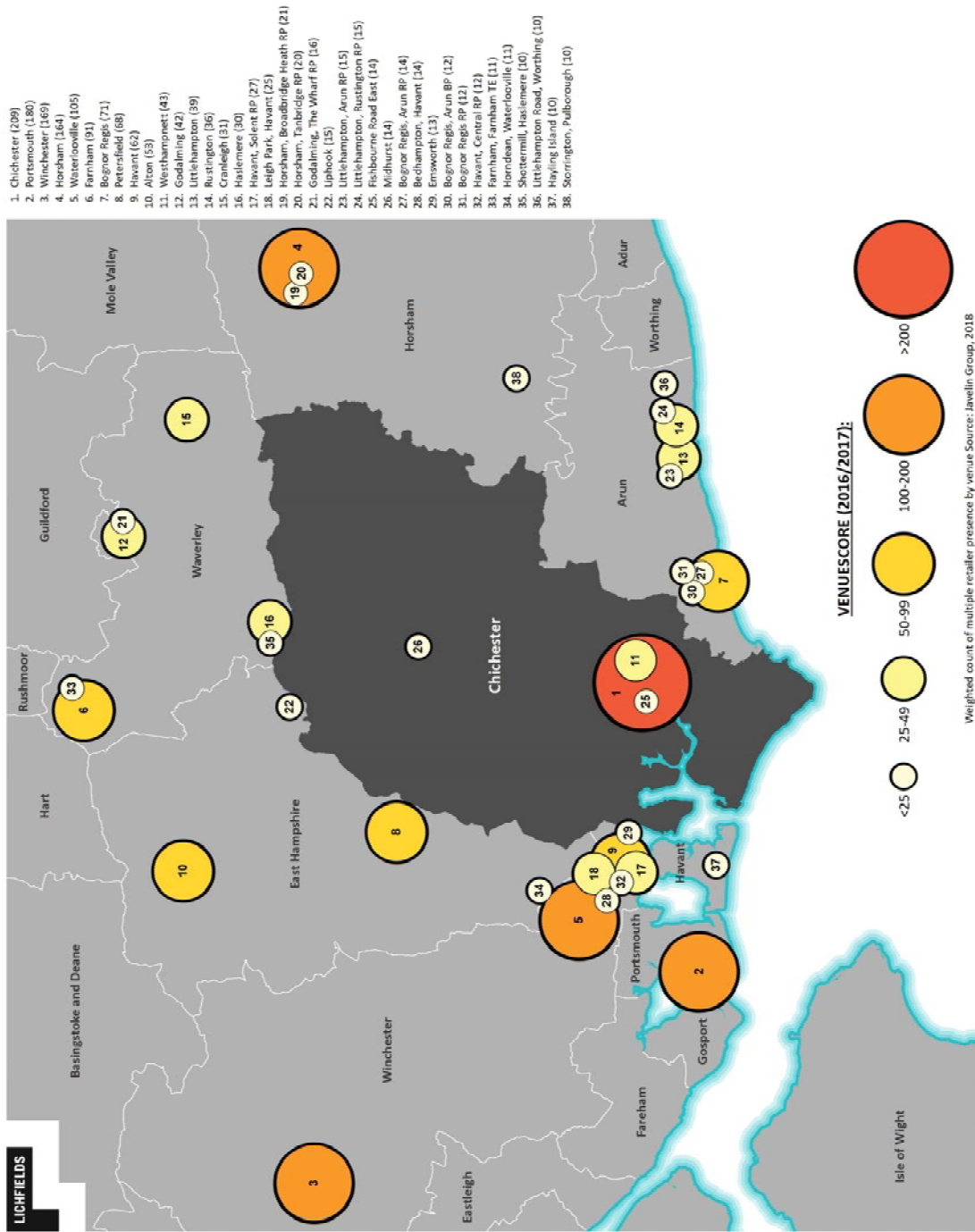
- 3.35 The Javelin Group’s Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The scores relate to each shopping destination and do not include out of centre stores.
- 3.36 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. The results for Chichester District and other relevant centres outside of the District are shown in Table 3.1.
- 3.37 The location of Venuescore centres is shown in Figure 3.4, and this indicates that residents in Chichester District have good access to several large centres, as well as having a choice of smaller centres to meet their day to day shopping needs.
- 3.38 Chichester city centre is at the top of the hierarchy in the sub-region with a Venuescore of 209 and is ranked 74th in the UK. This places Chichester above centres such as Portsmouth (101st), Worthing (104th) and Winchester (125th). However further afield Brighton (7th), Southampton (20th) and Guildford (29th) have much higher Venuescores ranging from 315 to 503. The planned closure of House of Fraser in Chichester (the only proposed closure in the sub-region) is likely to lead to a drop the city centre’s Venuescore, but the city should remain at the top of the local hierarchy. The vacated space could provide an opportunity to attract new retailers who cannot find large premises in Chichester.

Table 3.1 Venuescore UK Shopping Index and UK Rank

Shopping Destination	Location Grade	Venuescore	UK Rank	Market Position
Chichester	Regional	209	74	Upper Middle
Portsmouth	Regional	180	101	Middle
Winchester	Regional	169	125	Upper Middle
Horsham	Regional	164	136	Upper Middle
Waterlooville	Sub-Regional	105	238	Middle
Farnham	Sub-Regional	91	292	Upper Middle
Bognor Regis	Major District	71	398	Lower Middle
Petersfield	Major District	68	416	Middle
Havant	Major District	62	473	Lower Middle
Alton	Major District	53	568	Middle
Westhampnett, Chichester	District	43	710	Middle
Godalming	District	42	733	Upper Middle
Littlehampton	District	39	799	Lower Middle
Rustington, Littlehampton	District	36	879	Middle
Cranleigh	District	31	1044	Middle
Haslemere	District	30	1074	Upper Middle
Havant, Solent Retail Park	Minor District	27	1187	Middle
Leigh Park, Havant	Minor District	25	1276	-
Horsham, Broadbridge Heath Retail Park	Minor District	21	1481	Middle
Horsham, Tanbridge Retail Park	Minor District	20	1559	Upscale
Godalming, The Wharf Retail Park	Local	16	1888	Middle
Liphook	Local	15	2021	Middle
Littlehampton, Arun Retail Park	Local	15	2021	Middle
Littlehampton, Rustington Retail Park	Local	15	2021	Middle
Fishbourne Road East, Chichester	Local	14	2171	Middle
Midhurst, Chichester	Local	14	2171	Middle
Bognor Regis, Arun Retail Park	Local	14	2171	Middle
Bedhampton, Havant	Local	14	2171	-
Emsworth	Local	13	2377	Middle
Bognor Regis, Arun B P	Local	12	2566	Middle
Bognor Regis, Bognor Regis Retail Park	Local	12	2566	-
Havant, Central Retail Park	Local	12	2566	Middle
Farnham, Farnham T E	Local	11	2815	Middle
Horndean, Waterlooville	Local	11	2815	Middle
Shottermill, Haslemere	Local	10	3133	Middle
Littlehampton Road, Worthing	Local	10	3133	-
Hayling Island	Local	10	3133	Lower Middle
Storrington, Pulborough	Local	10	3133	Middle

Source: Venuescore, Javelin Group 2016/17

Figure 3.4 Venuescore 2016/17 Rankings



- 3.39 Smaller centres in the District have few national multiple retailers and are not included within the Venuescore analysis. It should also be noted that the Venuescore data is weighted towards clothing and fashion retailing. Within the sub-region, clothing/fashion shopping facilities are primarily focused in the city and larger town centres. Consistent with this polarisation of clothing/fashion shopping in larger centres in Chichester, Winchester, Horsham and Portsmouth received similar scores for fashion orientation.
- 3.40 Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount (i.e. pound shops) to luxury (i.e. brands such as Chanel) or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 3.1. Again, this information is weighted towards clothing and fashion retailing.
- 3.41 Each venue has an estimated average market position score based on the retailers present, with the 'market position index' for each centre then calculated by comparing the venue's market position score against the average for all venues.
- 3.42 The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.
- 3.43 The cities of Chichester and Winchester are classified as having an "Upper Middle" market position. Smaller centres at Farnham, Godalming, Haslemere and Horsham are also classified as "Upper Middle" despite their relatively low Venuescores. This indicates that these centres have a good provision of high quality independent clothes/fashion shops that are not recorded in the Venuescore. The "Upper Middle" market position reflects the relatively high levels of affluence within the sub-region.
- 3.44 Fishbourne Road East, Westhampnett, Midhurst, Portsmouth and most of the other centres in the region are categorised as having a "Middle" market position, which suggests they do not offer the same level of luxury/high quality retailing.
- 3.45 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:
- 1 age focus (is the offer targeting younger or older consumers?); and
 - 2 fashionability of its offer (is the clothing offer traditional or progressive?).
- 3.46 The Javelin Group classifies retailers in terms of their "fashionability" ranging from "traditional" at one end, then "updated classic", "fashion moderate", "fashion forward" through to "progressive" at the other, i.e. least fashionable to the most fashionable. This classification is only reliable for larger centres because it focuses on national multiples rather than independent outlets.
- 3.47 The age position of the fashion offer is also classified ranging from "young", "middle" to "old", for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and shops such as Wallis and Edinburgh Woollen Mill appealing more to the old.
- 3.48 Chichester tends to cater predominantly for older customers, being described as "updated classic". This reflects the older age profile of residents within the District. The vision for Chichester seeks to increase the attraction of the city centre for younger customers.
- 3.49 The Javelin information outlined above, indicates that Chichester is the most significant shopping destination in the District, and has the best prospects for attracting future growth and major investment.

4.0 The Need for Retail Uses

Introduction

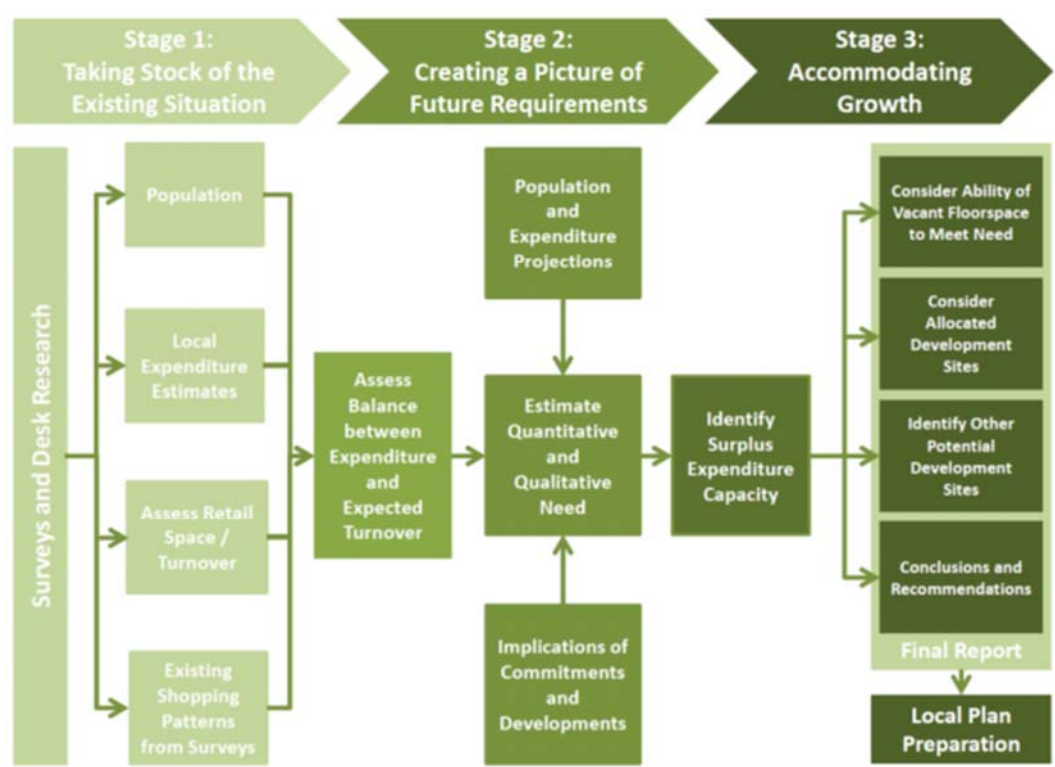
4.1 This section assesses the need for Class A1 retail uses within Chichester District. The NPPF (para. 14) indicates that Local Planning Authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

4.2 This section objectively assesses the quantitative and qualitative scope for retail uses in Chichester District for the period 2018 to 2036. It sets out the methodology adopted and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health check/audits in Section 7.

Methodology and Base Data

4.3 The methodology is summarised in Figure 4.1. The approach adopted to produce retail projections follows the key steps identified within the PPG. The approach adopts economic growth forecasts that are widely used and accepted for development plan preparation and at planning inquiries.

Figure 4.1 Methodology for Estimating Future Requirements for Retail Floorspace



Source: Lichfields

4.4 Stage 1 establishes existing demand (population and expenditure) and supply (floorspace and facilities). Stage 2 assesses the balance between supply and demand and projects forward to quantify future requirements for new facilities. Stage 3 considers how future growth should be distributed and accommodated.

Price Base

- 4.5 All monetary values expressed in this study are at 2016 prices, consistent with Experian's most up to date base year expenditure figures for 2016 (Experian Briefing Note 15, December 2017).

Study Area

- 4.6 A study area has been defined to cover these catchment areas and a household telephone survey has been undertaken to quantify existing shopping and leisure patterns. The study area defined in the 2006 study and the 2010 retail update study has been reviewed and amended to better reflect the distribution of population and main centres within the District and beyond.
- 4.7 The study area covers the primary catchment areas of the town centres in Chichester District. The primary catchment area is the hinterland where each town/shopping destinations attracts most of its trade. The study area has been sub-divided into 7 zones as shown in Appendix 1, based on postcode boundaries, reflecting the primary catchment areas of the main destinations within the District i.e. Chichester, East Wittering/ Bracklesham, Selsey, Southbourne and Tangmere, as well as those beyond i.e. Bognor Regis and Waterlooville.

Population

- 4.8 The projected population within the study area between 2018 and 2036 is set out in Table 1, Appendix 2. Base year population data has been obtained from Experian for each zone based on the 2011 Census. The 2016 Experian population estimate for each zone has been projected forward up to 2036 using the Office of National Statistics' latest 2014-based sub-national population projections (published May 2016) and the Chichester Housing and Economic Development Needs Assessment (January 2018). The base year (2018) population within the study area is 406,812 which is projected to increase by 14.9% to 460,319 by 2036.
- 4.9 If population projections change during the development process then it may be necessary to monitor and test the implications of these changes, and revised floorspace capacity figures may need to be produced. The implications of potential these changes to population projections are not expected to significantly change the floorspace capacity estimates in this report.

Tourism

- 4.10 In addition to the resident population, Chichester District's centres benefit from tourist visitors who do not live in the local area. The Visitor Economy of Chichester Report, prepared by TSE Research, indicates Chichester District attracted 5,657,883-day visitors and 571,053 overnight visitors in 2015. These figures suggest that on average there are around 17,000 tourist visitors in the District each day.
- 4.11 It is assumed that 20% (1,245,787) of these total visitors (6,228,936) are from outside of the District (to avoid double counting of expenditure). This additional non-resident population will generate trade for shops and services in Chichester District. An allowance has been made in the capacity models (Appendix 2, 3 and 4) for additional expenditure from tourists, based on the average expenditure figures for tourists included in the TSE report (shopping - £26.65 per day and food and beverage - £11.09 per day). Shopping has been split 70% for comparison goods and 30% for convenience goods.

Retail Expenditure

- 4.12 The level of available expenditure to support retailers is based on first establishing per capita levels of spend for the study area population. Experian's local consumer expenditure estimates

for comparison and convenience goods for each of the study area zones for the year 2016 have been obtained.

- 4.13 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15, December 2017) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes several macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and values, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Growth Rates

- 4.14 Experian's EBS growth forecast rates for expenditure reflect the current economic circumstance and post Brexit forecasts. Experian provides an appropriate growth rate for the short term as per Table 4.1 below. In the longer term it is more difficult to forecast year on year changes in expenditure, but Experian's longer-term growth average forecasts have been adopted and are set out in the Table 4.1 below.

Table 4.1 Post-Brexit Growth Forecasts

Year	Convenience Goods Growth Forecasts	Comparison Goods Growth Forecasts
2017	0%	+2.3%
2018	-0.6%	+0.9%
2019	-0.2%	+2.1%
2020-2024	0.1% per annum	+3.2% per annum
Post 2024	0.1% per annum	+3.2% per annum

Source: Experian Briefing Note 15 (December 2017)

- 4.15 These growth rates are relatively cautious when compared with past growth rates, but represent the most realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading

- 4.16 Special Forms of Trading (SFT) or non-store activity is included within Experian's expenditure estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling.
- 4.17 Home/electronic shopping has emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.
- 4.18 SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. The Experian information suggests that non-store retail sales in 2017 was:
- 10.8% of convenience goods expenditure; and
 - 19.7% of comparison goods expenditure.

- 4.19 Experian predicts that these figures will increase in the future. Experian recognises that not all this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies.
- 4.20 The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. Furthermore, the growth in online sales through retail businesses will reduce the need for sales floorspace, but should allow operators to increase their turnover efficiency. This trend has been considered. The adjusted figures for SFT are set out in Table 4.2 below.

Table 4.2 Adjusted SFT Estimates for the UK

Year	Convenience (%)	Comparison (%)
2018	3.4%	15.4%
By 2021	3.9%	16.9%
By 2031	5.1%	17.8%
By 2036	5.3%	18.0%

Source: Experian Briefing Note 15 (December 2017)

- 4.21 These figures relate to the national average and need to be adjusted to reflect the Chichester study area. The household shopper survey results suggest higher levels of home shopping and SFT within the study area for comparison goods. The adjusted reductions for comparison goods SFT range from 16.9% to 23.6% in the study area zones at 2018 compared with the national average of 15.4%. Expenditure projections have been adjusted to reflect these higher SFT deductions.

Forecast Spend Per Head

- 4.22 Table 2, Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2036. Forecasts of comparison goods spending per capita are shown in Table 2, Appendix 3.
- 4.23 Table 3, Appendix 2 sets out total convenience goods within the study area up to 2036 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3, Appendix 3.
- 4.24 Because of growth in population, convenience goods spending within the study area is forecast to increase by 12.6% from £898.52 million in 2018 to £1,011.98 million in 2036, as shown in Table 3, Appendix 2. Comparison goods spending is forecast to increase by some 91% between 2018 and 2036, increasing from £1,267.10 million in 2018 to £2,424.84 million in 2036, as shown in Table 3, Appendix 3. These figures relate to real growth and exclude inflation.
- 4.25 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. Growth is still likely to be less than was previously envisaged pre-Brexit.

Market Shares/Penetration Rates

- 4.26 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates is based on a range of factors but primarily information gathered through the January 2018 household survey. The

results of the household shopper questionnaire survey undertaken by NEMS in January 2018 have been used to estimate existing shopping patterns within the study area zones. The tabulated results are shown in Appendix 5.

- 4.27 The total turnover of shops within Chichester District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data, which provides an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.
- 4.28 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.
- 4.29 The market shares for comparison goods shopping are shown in Table 4 in Appendix 3. This market share is based on a weighted average for each comparison goods category including within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products.

Existing Turnover Levels

- 4.30 Company average turnover of sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated as shown in Table 10a and 10b, Appendix 2. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 4.31 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and Lichfields' own on-site surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.
- 4.32 Global Data and Mintel's Retail Rankings provide company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges between £5,000 and £8,000 per sq.m net. The average sales density for food and beverage outlets is usually around £5,000 per sq.m gross.

Existing Spending Patterns

Convenience Shopping

- 4.33 The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. A summary of food and grocery shopping patterns for main food shopping trips for the most frequently used stores (over 5% of respondents) by zone is shown below in Table 4.3.

Table 4.3 Main Food Shopping Destinations Most Used by Respondents by Zone

Zone	Destination	Destination Zone
Zone 1 - Chichester/ Tangmere	Tesco Extra, Chichester (36.3%)	1
	Sainsbury's, Chichester (26.7%)	1
	Waitrose, Chichester (12.4%)	1
	Lidl, Chichester (9.7%)	1
	M&S Food Hall, Chichester (1.9%)	1
Zone 2 - Hayling Island/South Downs/ Southbourne	Tesco Extra, Havant (24.9%)	1
	Sainsbury's, Chichester (11.9%)	7
	Tesco Extra, Chichester (9.8%)	1
	Aldi, Havant (7.6%)	1
	Waitrose, Chichester (7.1%)	7
	Waitrose, Havant (6.6%)	1
	Aldi, Chichester (6.4%)	7
Zone 3 - Selsey/East Wittering/ Bracklesham	Tesco Extra, Chichester (31.9%)	1
	Sainsbury's, Chichester (18.6%)	1
	Asda, Selsey (11.6%)	1
	Waitrose, Chichester (6.8%)	3
	Aldi, Chichester (5.1%)	1
Zone 4 - Bognor Regis	Tesco, Bognor Regis (26.3%)	1
	Sainsbury's, Bognor Regis (22.3%)	4
	Morrison's, Bognor Regis (16.3%)	4
	Tesco Express, St. James Road, Chichester (5.4%)	4
	Tesco Express, Bognor Regis (5.4%)	1
	M&S Food Hall, Bognor Regis (0.7%)	4
Zone 5 - South Downs (North)	Tesco Metro, Pulborough (14.7%)	4
	Waitrose, Horsham (12.4%)	Outside
	Waitrose, Petersfield (9%)	outside
	Sainsbury's, Chichester (6.3%)	5
	Tesco Extra, Chichester (6.2%)	1
Zone 6 - Arundel/ Littlehampton	Tesco, Littlehampton (29.4%)	1
	Sainsbury's, Rustington Retail Park (20.6%)	6
	Morrison's, Littlehampton (9.8%)	6
	Waitrose, Chichester (5.6%)	6
Zone 7 - Waterlooville/ Havant	Morrison's, Horndean, Waterlooville (13.3%)	1
	Tesco Extra, Havant (13%)	7
	Lidl, Cowplain, Waterlooville (8.5%)	7
	Sainsbury's, Waterlooville (13%)	7
	Asda, Bedhampton, Havant (7.5%)	7
	Co-op, Horndean (6.1%)	7

Source: NEMS Household Survey, January 2018

- 4.34 The survey results indicate most residents in Chichester do their main food shopping locally in Zone 1. Chichester also attracts a significant share of customers from Zone 3 (Selsey/East Wittering/ Bracklesham), and to a lesser extent Zone 2 (Hayling Island/South Downs/ Southbourne). Zones 1 to 3 are the core zones within Chichester District that represent the primary catchment area.
- 4.35 Most respondents undertake their main food shopping within the local zone of origin. The food stores in Chichester District retain a high proportion of main food and grocery shopping trips generated by residents in the District. Households in the District (to the south of the National

Park) have good access to a range of large food stores. Households in the District (to the north of the National Park) have a more limited range of food stores in the District, but do have access to larger food stores outside the District.

- 4.36 Table 4, Appendix 2 indicates the proportion of total convenience goods expenditure (main and top up trips) within each zone attracted to each destination. Chichester District retains nearly 98% of convenience goods expenditure within Zone 1 (the core zone).
- 4.37 The level of convenience goods expenditure attracted to shops/stores in Chichester District in 2018 is estimated to be £253.54 million as shown in Table 5, Appendix 2, applying the market shares set out in Table 4, Appendix 2.
- 4.38 Overall Chichester District has a relatively high retention of convenience goods expenditure and there is only limited potential to increase this level of retention. The base year figures when compared with the benchmark turnovers of the main food stores suggest that convenience goods retail sales floorspace in the District is collectively trading healthily. A breakdown for each main centre is set out in Table 4.4.

Table 4.4 Convenience Goods Turnover at 2018

Destination	2018 Turnover £M
Chichester	208.19
Selsey	21.51
East Wittering/Bracklesham	10.25
Chichester Rural	13.60
Total	253.54

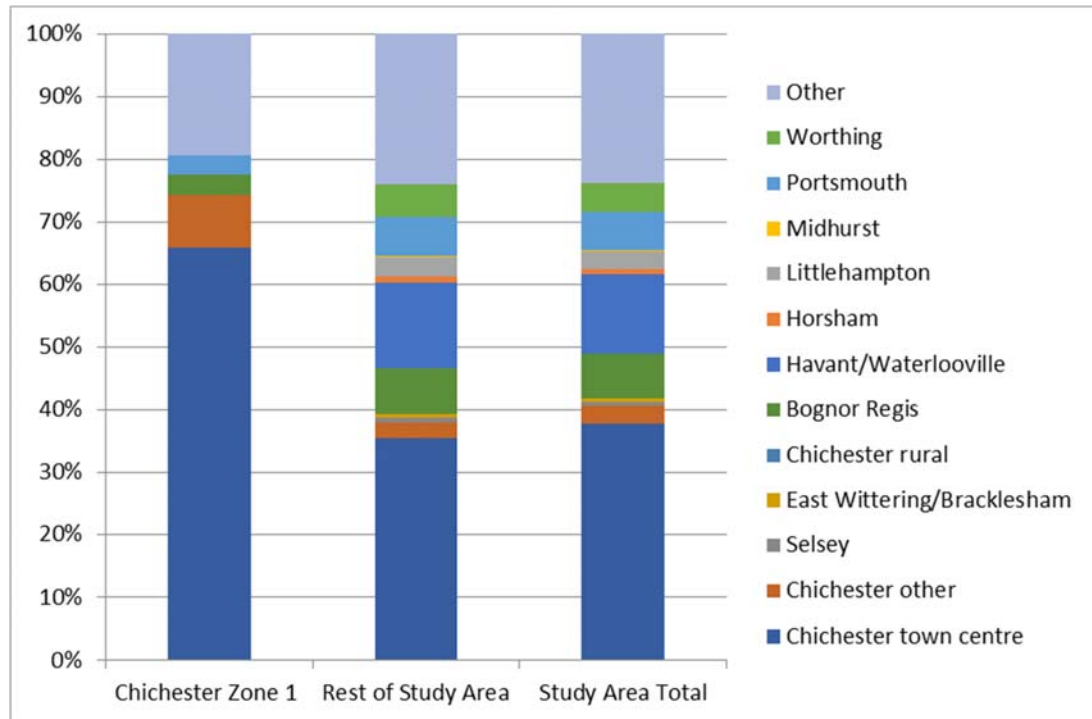
Source: Table 11, Appendix 2

- 4.39 A qualitative analysis of convenience goods provision is set out later in this section.

Comparison Shopping

- 4.40 Respondents to the household survey were asked where they generally buy most of their household's non-food shopping. Results are provided for Chichester Zone 1, the other zones (Zones 2-7) and the study area as a whole, and are summarised in Figure 4.2 below. For Zone 1 (Chichester/Tangmere), Chichester city centre was the most popular destination (66%). In the rest of the study area, again Chichester city centre was also the most popular destination, although this was much lower at around 36%, followed by Havant, Bognor Regis and Portsmouth.
- 4.41 A summary of comparison goods shopping patterns is shown in Table 4 in Appendix 3. This table sets out the proportion of comparison goods expenditure within each zone that is spent within each shopping destination. Destinations in Chichester District retain a high proportion of comparison goods expenditure within the core zones (Zone 1 to 3).
- 4.42 The estimated comparison goods expenditure currently attracted by shopping facilities within Chichester District is £496.59 million in 2018, as shown in Table 5, Appendix 3. The retention of comparison goods shopping trips within Chichester District is lower than for convenience goods shopping. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and travel longer distances to visit larger centres that have a better range and choice of shops.

Figure 4.2 Non-Food Shopping (main destinations named by respondents)



Source: NEMS Household Survey, January 2017 (Question 7)

4.43 Total comparison goods sales floorspace within the District is estimated to be 71,368 sq.m net, as shown in Table 10 in Appendix 3. The average sales density for existing comparison goods sales floorspace within the District is 6,958 per sq.m net.

4.44 Based on Lichfields' recent experience across the country, average sales densities for comparison floorspace can vary significantly. Average sales densities above £7,000 per sq.m net are usually only achieved by relatively large shopping centres. In smaller centres, usually where the property costs are much lower, these high sales densities are not normally achieved. Average sales densities of between £3,000 and £6,000 per sq.m net are generally achieved in medium sized and smaller centres. Overall trading levels are reasonably strong in Chichester District. Existing floorspace appears to be trading well despite difficult market conditions.

Capacity for Future Convenience Goods Floorspace

4.45 The future level of available convenience goods expenditure at 2021, 2026, 2031 and 2036 is shown at Tables 7 to 10, Appendix 2. Future market shares from 2021 onwards have been adjusted to reflect the build-up of trade at the new Asda store in Selsey, as shown in Table 6 in Appendix 2.

4.46 The total level of convenience goods expenditure available for shops in the District between 2018 and 2036 is summarised in Table 12, Appendix 2. Convenience expenditure available to shopping facilities in the District is expected to increase from £253.54 million in 2018 to £287.23 million in 2036.

4.47 Table 11 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, the available convenience goods expenditure surplus at 2021 is of £4.50 million. This

surplus is projected to grow to £14.13 million by 2026, £23.87 million by 2031 and £33.44 million by 2036, due to future growth (primarily population growth).

4.48 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq.m, an approximate average turnover density for main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops. The figures are summarised in Table 4.5 below.

4.49 There is a projected expenditure surplus in Chichester that could support reasonable level of additional floorspace in line with population growth. In Selsey and East Wittering/Bracklesham surplus convenience goods expenditure could support a limited amount of additional floorspace.

Table 4.5 Summary of Convenience Goods Floorspace Projections (sq. m gross)

Centre	By 2021	By 2026	By 2031	By 2036
Chichester	458	1,352	2,289	3,208
Selsey	56	168	280	390
East Wittering/Bracklesham	26	80	133	185
Chichester rural	26	82	140	198
Total	536	1,682	2,842	3,981

Source: Table 13 in Appendix 2

Capacity for Future Comparison Goods Floorspace

4.50 Future improvements to comparison retail provision within the District could help to increase market shares within the study area. Some retail development will be necessary in Chichester to maintain its existing market share in the future. Allowing for the growth in home shopping, the town centre strategy should focus on maintaining and increasing market shares of traditional forms of expenditure. This approach will respond to future competition in nearby centres, and help to maintain the vitality and viability of the centre.

4.51 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2018 (i.e. satisfactory levels). Table 11, Appendix 3 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of +0.9% in 2018, +2.1% in 2019, +3.2% between 2020-2024 and +3.2% post 2024 has been adopted, and these growth rates are required to maintain the health and viability of town centres, as recommended by Experian (Retail Planner Briefing Note 15 – December 2017). Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spend growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

4.52 Table 11 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an available expenditure surplus of £13.70 million comparison goods expenditure by 2021. This surplus will grow to £64.29 million by 2026, £133.47 million by 2031 and £220.07 million by 2036, allowing for The Range proposed at the former BHS store.

4.53 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 12, Appendix 3, adopting an average sales density of £7,000 per sq.m net in 2018, which is projected to grow in the future due to improved turnover efficiency. The figures are summarised in Table 4.6 below.

Table 4.6 Summary of Comparison Goods Floorspace Projections (sq. m gross)

Centre	By 2021	By 2026	By 2031	By 2036
Chichester	2,321	9,925	18,532	27,435
Selsey	109	333	585	848
East Wittering/Bracklesham	38	118	206	298
Chichester rural	15	46	81	118
Total	2,483	10,421	19,405	28,698

Source: Table 12, Appendix 3

The Retail Study Update 2010

4.54 DTZ completed the West Sussex Coastal Districts Retail Study in 2006 on behalf of several local planning authorities, which included Chichester District Council. That study included quantitative forecasts of future retail floorspace needs in each of the principal town centres in the study area. This included Chichester, but did not include the other main centres in the District. In 2010 DTZ updated the part of the 2006 study relating to Chichester District with the latest information on growth in population and expenditure and other forecasting parameters, rolling it forward to 2026. It was also extended to include retail capacity forecasts for Midhurst, Petworth, Selsey and East Wittering.

4.55 The 2010 study's baseline convenience goods floorspace projections up to 2026 are set out below:

- 1 Chichester city centre – 3,250 sq.m net;
- 2 Selsey – 200 sq.m net;
- 3 East Wittering – 100 sq.m net.

4.56 The 2010 study comparison goods floorspace projection up to 2026 is set out below:

- 1 Chichester city centre – 29,750 sq.m net.
- 2 Chichester out of centre (scenario 1) – 20,050 sq.m net.

4.57 The District wide convenience goods floorspace projection in 2010 was 3,550 sq.m net. The revised projections in this 2018 study is lower at 1,178 sq.m net at 2026, which is lower primarily due to the implementation of food store development since 2010 e.g. the Asda at Selsey.

4.58 The Chichester comparison goods floorspace projection in 2010 was 49,800 sq.m net. The revised projections in this 2018 study suggest much lower levels of comparison floorspace up to 2026 for Chichester. The main reason for this reduction is Experian's lower comparison goods expenditure forecasts.

Qualitative Need for Retail Floorspace

4.59 The section above quantifies the theoretical capacity to support new retail floorspace within Chichester District, based on the population and expenditure projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:

- 1 the diversity of uses and deficiencies or 'gaps' in existing provision;
- 2 consumer choice and competition;
- 3 levels of expenditure retention and leakage;
- 4 overtrading, congestion and overcrowding of existing stores;

- 5 location specific needs such as underserved markets; and
- 6 the quality of existing provision.

Existing Retail Provision in Chichester District

4.60 As part of the study, an audit of the existing retail and service provision in the main settlements (Chichester, Selsey, East Wittering/Bracklesham, Southbourne and Tangmere) was undertaken in February 2018. These assessments are detailed in Section 7 of this study and a summary of existing retail provision is provided in Table 4.7 below.

Table 4.7 Convenience and Comparison Floorspace

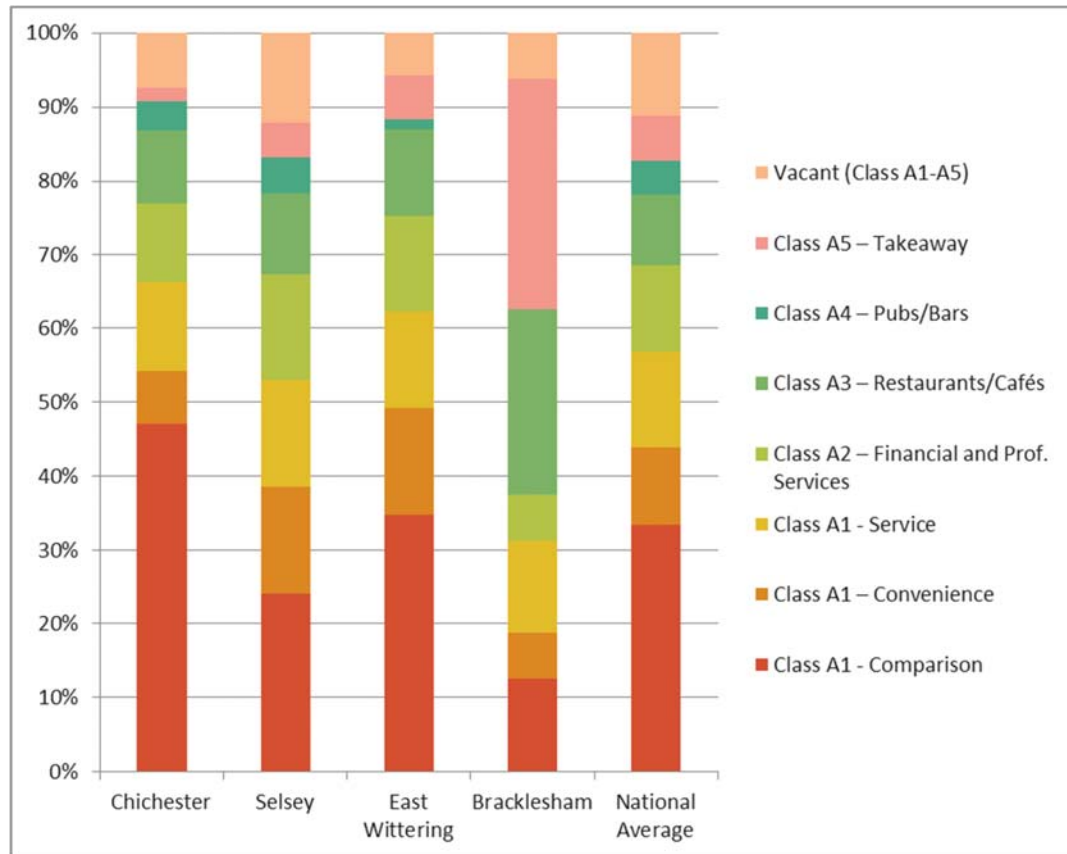
Centre	No. of Class A1-Retail Units	Convenience Floorspace Sq.M net	Comparison Floorspace Sq.M Net	Total Retail Floorspace Sq.M Net
Chichester city centre	235	4,066	40,890	44,956
Chichester out of centre	n/a	14,422	26,830	41,252
Selsey	32	2,550	1,608	4,158
East Wittering/ Bracklesham	37	1,022	1,980	3,002
Tangmere	2	336	10	346
Southbourne	6	546	60	606
Total	312	22,942	71,378	94,320

Source: Chichester Experian Goad Plan May 2017, VOA Data and Lichfields' Site Survey (February 2018)

4.61 Chichester is the largest shopping destination within the District with a combined retail sales floorspace of over 86,000 sq.m net. These floorspace figures include out of centre food stores and retail warehouses, in addition to facilities within the defined town centres. Selsey is the next largest destination, with a combined retail sales floorspace of 4,158 sq.m net, but this includes the out of centre Asda store (1,350 sq.m net). East Wittering/ Bracklesham, with a combined retail sales floorspace of around 3,000 sq.m net. Tangmere and Southbourne are much smaller, with only a very limited number of dispersed shop units that cater for local needs.

4.62 Figure 4.3 shows the proportional mix of Class A within the main centres in Chichester, Selsey and East Wittering/Bracklesham (excluding out of centre food stores and retail warehouses). The mix of Class A units has been compared with Goad Plan national average (January 2017) based on recent land use surveys for over 1,250 town centres across the UK. It should be noted that the Goad national average is based on a full range of large, medium and small centres throughout the UK. Smaller centres tend to have a lower proportion of Class A1 comparison shops than larger centres, and conversely a higher proportion of convenience retailing and non-retail services. Nevertheless, the comparison with the national average data provides a useful benchmark.

Figure 4.3 Mix of Class A Uses in Chichester District's Main Centres



Source: Chichester Experian Goad Plan May 2017 and Lichfields' Site Survey (February 2018)

- 4.63 In Chichester, the proportion of Class A1 comparison units is significantly above the national average, reflecting its role as a major regional shopping destination. Conversely the proportion of Class A1 convenience units is below the national average. Chichester's convenience goods shopping provision is located primarily out of centre e.g. Tesco Extra and Sainsbury's.
- 4.64 The proportion of Class A1 and Class A2 non-retail services is just below the national average, as is the Class A4 pubs/bar and Class A5 takeaway offer. The Class A3 restaurant/café provision is slightly higher than the national average. The vacancy rate (7.4%) is below the national average of 11.2%, suggesting the town centre is healthy.
- 4.65 Selsey has a significantly below average provision of comparison units (almost 10 percentage points). The centre is well served by convenience units, at around 4% above the national average. Class A1 and A2 service uses are also above the national average and include hairdressers, estate agents and banks. Food and drink uses are limited to a few independent cafés, restaurants and pubs/bars. The vacancy rate (12%) is slightly above the national average.
- 4.66 East Wittering has a comparison offer slightly above the national average and the centre is well served by convenience units. Class A1 and A2 non-retail service uses are around or above the national average. Food and drink uses are limited to a few independent cafés, restaurants and a bar. The vacancy rate (5.8%) is below the national average, suggesting the centre is healthy.
- 4.67 Bracklesham is a very small centre, which has a significantly below average provision of comparison units when compared with the national average. It also has a below average provision of convenience units, with only a newsagent. Given the proximity to East Wittering,

this is considered consistent with its role as a small local centre, predominately serving local residents. Class A1 and A2 service provision is also below the national average and there are no pubs/bars. The provision of restaurants/cafés and takeaways is however significantly above the national average, reflecting its role as a primarily tourist destination, next to the sea front. The vacancy rate (6.3%) is below the national average. A more detailed audit of the centres is contained within Section 7 of this study.

Convenience Goods Shopping

- 4.68 Most households undertake two types of food and grocery shopping trips i.e. a weekly shop (or less frequent main or bulk shopping trip) and more regular top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips and large supermarkets or superstores are the usual destinations. Accessibility and convenience tend to be more important for top up shopping trips.
- 4.69 **Chichester and Tangmere are in Zone 1 (Chichester/Tangmere).** Convenience shopping provision in Chichester city centre is below the Goad national average in terms of the proportion of shop units, Chichester has a good choice of large out of centre food stores. Within the town centre, the key offer includes Marks & Spencer East Street Foodhall (536 sq.m), Iceland (428 sq.m) and Tesco Express (220 sq.m). There is also an edge of centre Waitrose (2,180 sq.m). This food store provision is supplemented by independent sandwich bars, newsagents and bakeries. Outside the town centre, there are several large convenience stores, including Tesco Extra to the west of the town centre (6,667 sq.m), a Lidl at Portfield Retail Park (886 sq.m), an M&S Foodhall at Portfield Retail Park (840 sq.m), Sainsbury's Superstore at Portfield (6,281 sq.m), Iceland at Barnfield Retail Park (667 sq.m) and a relatively new Aldi also at Barnfield Retail Park (993 sq.m). In terms of convenience goods expenditure retention, Chichester retains 97% within Zone 1. Tangmere has a limited existing convenience provision, with a Coop (229 sq.m) and One Stop (150 sq.m). These stores serve the existing population of Tangmere.
- 4.70 There is very limited expenditure leakage from Zone 1. Based on the choice of food stores, mix of uses and high expenditure retention, Zone 1 (Chichester/Tangmere) is well served in terms of convenience goods shopping provision.
- 4.71 **Southbourne is in Zone 2 (Hayling Island/South Downs/Southbourne).** There is a limited convenience offer in Southbourne, comprising of a Coop (229 sq.m) and a Tesco Express (135 sq.m). This is supplemented by a greengrocers and farm shop. The convenience offer is consistent with a settlement of this size. Residents look to larger stores in Chichester and Havant/Waterlooville to meet their main bulk food shopping needs. Most of the expenditure leakage is attracted to large food stores in Havant/Waterlooville (55%).
- 4.72 **Selsey and East Wittering/Bracklesham are in Zone 3 (Selsey/East Wittering/Bracklesham).** Selsey is well served by convenience units. Within the centre, the key offer comprises two Coop's (696 sq.m and 317 sq.m). These are supplemented by a range of independent greengrocers and newsagents. Out of centre, there is a large new Asda food store (1,350 sq.m). East Wittering has a few greengrocers, a butcher, Tesco Express (242 sq.m) and a Coop (328 sq.m). Bracklesham has a below average provision of convenience units, with only a newsagent. In terms of convenience goods expenditure retention, Selsey and East Wittering/Bracklesham retain 38% in Zone 3. There is very limited expenditure leakage outside of the District in Zone 3. Residents look to the larger stores in Chichester to meet their main bulk food shopping needs.
- 4.73 **Zones 4 (Bognor Regis), 5 (South Downs (North)), 6 (Arundel/Littlehampton) and 7 (Waterlooville/Havant)** do not contain any centres within Chichester District. Chichester District attracts low levels of expenditure from these zones. This is due to the availability of a

range of large food stores in Bognor Regis, Havant/Waterlooville and Littlehampton, meaning residents do not need to travel to Chichester to do their main food shopping.

4.74 In summary, food store and convenience retail provision is strong in Chichester District. Large food stores (over 1,000 sq. m net) suitable for main and bulk food shopping are focused in Chichester (mainly out of centre). These stores provide a good distribution of facilities accessible from all parts of the District (including those parts to the north of the National Park). The smaller centres provide a few small food stores suitable for basket and top up shopping. There are no clear identified areas of qualitative deficiency in food store provision within the District.

Comparison Goods Shopping

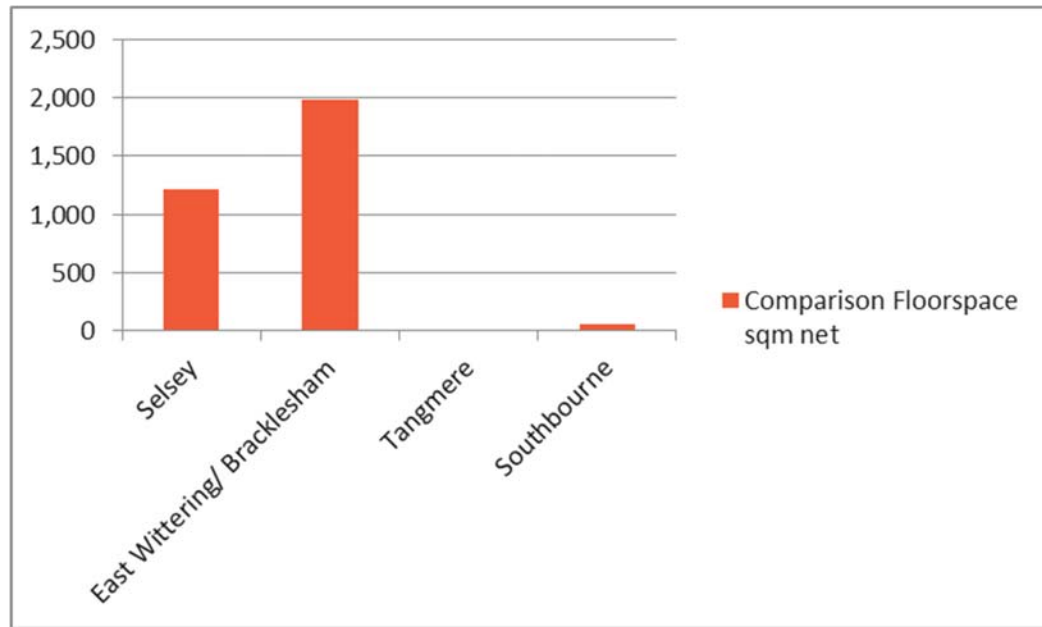
4.75 Within Chichester city centre, Selsey and East Wittering/Bracklesham there are 250 comparison shops which provide a total comparison goods sales floorspace of over 71,000 sq.m net (including comparison floorspace in food stores and retail warehouse parks). Figures 4.4 and 4.5 below provide a breakdown of the comparison floorspace by centre.

Figure 4.4 Comparison Goods Retail Sales Floorspace in Chichester (sq.m net)



Source: Chichester Experian Goad Plan May 2017, VOA Data and Lichfields' Site Survey (February 2018)

Figure 4.5 Comparison Goods Retail Sales Floorspace in the Other Main Centres



Source: Chichester Experian Goad Plan May 2017, VOA Data and Lichfields' Site Survey (February 2018)

4.76 As indicated above, the proportion of Class A1 comparison units in Chichester city centre is significantly above the national average. The provision of comparison good shopping is more limited in the smaller centres in the District, where the retail offer is predominantly small (less than 100 sq.m net) independent specialist traders. Chichester city centre is the focus for larger multiple comparison retailers, reflecting its role as the main shopping destination in the District.

4.77 Chichester District has a good provision of retail warehouses. There are two main retail parks in the District which are both located in Chichester (Portfield Retail Park and Barnfield Retail Park). National multiple retailers trading in these locations include Carpetright, Pets at Home, Harveys/Bensons for Beds, Currys/PC World, John Lewis at Home, Homesense, Office Outlet, Dunelm, Halfords, Wickes and Bunnings. Retail warehouses can also be found along Bognor Road, and predominately comprise DIY stores.

4.78 The household survey (January 2018) asked respondents where they shop for a range of comparison goods. A breakdown of expenditure retention is shown in Table 4.8.

Table 4.8 Comparison Goods Retention in Chichester District (% of respondents in core zones 1 to 3)

Goods category	% Retention
Clothes and shoes	70.8
Domestic electric appliances (e.g. fridges and kitchen items)	84.1
Other electric goods (e.g. TV / Hi-Fi and computers)	83.5
Furniture, soft furnishings and floor-coverings	66.0
DIY, hardware and garden items	66.3
Health, beauty and chemist item	82.9
Other comparison goods (e.g. books, CDs, toys and gifts)	83.4

Source: NEMS Household Shopper Survey January 2018

- 4.79 The results indicate that Chichester District has a reasonably high level of expenditure retention for all product categories, reflecting that Chichester is the main shopping destination in the sub-region. Havant/Waterlooville and Portsmouth are the major attractors of expenditure outside of the District.
- 4.80 **Chichester and Tangmere are in Zone 1 (Chichester/Tangmere)** but the household survey results confirm Chichester serves customers across all 7 study area zones. There are 204 Class A1 comparison units in Chichester city centre (47.1%) which is significantly higher than the Goad national average (33.4%). These shops, along with out of centre retail warehouses in Chichester and comparison floorspace in food stores, provide almost 68,000 sq.m net of comparison goods sales area. In terms of comparison goods expenditure retention, Chichester retains over 84% in Zone 1. There is some limited outflow of expenditure, primarily to Bognor Regis (2.8%) and Portsmouth (5.3%). This level of retention is high and reflects Chichester's role as the main shopping destination within the District.
- 4.81 **Selsey and East Wittering/Bracklesham are in Zone 3 (Selsey/East Wittering/Bracklesham)**. There are 20 comparison units in Selsey (24.1%) which is significantly lower than the Goad national average (33.4%). These shops provide around 1,220 sq.m net of comparison goods sales area. East Wittering/Bracklesham has 26 comparison units (30.6%) which is slightly lower than the Goad national average. These shops provide around 1,980 sq.m net of comparison goods sales area.
- 4.82 In terms of comparison goods expenditure retention, the household survey results confirm these centres serve local catchment areas, with very limited expenditure coming from any other zones. Selsey attracts around 10% in Zone 3 and East Wittering/Bracklesham around 4% in Zone 3. These low market shares reflect the centre's roles as local shopping destinations. Chichester is the main comparison goods shopping destination in Zone 3, and adequately serves this area. There is some outflow of expenditure in Zone 3 to Bognor Regis (5.9%) and Portsmouth (6.7%).
- 4.83 In summary, comparison goods retail provision is strong within the District, but provision is primarily concentrated Chichester. Chichester District has a reasonably high level of expenditure retention for all product categories, reflecting Chichester's role as the main shopping destination in the sub-region. Chichester city centre has a higher order comparison goods shopping offer and the out of centre retail stores in Chichester also provide a range of comparison goods shopping, for example John Lewis at Home, Dunelm, Curry's/PC World and Homesense at Portfield Retail Park and Halfords, Wickes and Bunnings and Barnfield Retail Park. Residents to the west of the District also have easy access to other key centres outside the District such as Portsmouth and Havant/Waterlooville.
- 4.84 There is limited potential to increase its market share of comparison goods expenditure, but investment will still be needed in the District to retain the existing levels of comparison goods expenditure. The objective of the development strategy for Chichester District should therefore be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections in this section assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

5.0 The Need for Food/Beverage Uses

Introduction

5.1 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- Class A1 services cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- Class A2 services include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- Class A3/A5 including restaurants, cafes (A3) and takeaways (A5).
- Class A4 pubs/bars (Class A4).

5.2 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage. Recently some chains have experienced difficulties resulting in closures, which should operators may have over-stretched.

5.3 These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

5.4 The key categories for food and beverage offers are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining:** incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

Mix of Uses

5.5 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars, pubs and takeaways have supported other major leisure uses on leisure and retail parks and are important services within town centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. The current mix of Class A1-A5 uses in the main centres in the District is summarised in Table 5.1 below.

Table 5.1 Mix of Class A / Food and Beverage Uses in the Main Centres in Chichester

Centre	Use Class % of Total Class A Units					
	Class A1	Class A2	Class A3	Class A4	Class A5	Vacant
Chichester	66.3	10.6	9.9	3.9	1.8	7.4
Selsey	53	14.5	10.8	4.8	4.8	12
East Wittering	62.3	13	11.6	1.4	5.8	5.8
Bracklesham	31.3	6.3	25	0	31.3	6.3
National Average	56.9	11.8	9.5	4.6	6	11.2

Source: Experian Goad for Chichester (May 2017) and Lichfields' Site Visit (February 2018)

5.6 Chichester city centre has retained a good level of Class A1 retail use when compared with the national average. The provision of Class A1 uses in Selsey is slightly lower than the national average and whilst the provision of Class A1 uses in Bracklesham is below the national average, when combined with East Wittering, the provision is around the national average. The vacancy rate remains very low within most centres, except for Selsey, where it is slightly higher than the national average. All centres have a higher than average provision of Class A3 (restaurant/café) uses. Only Selsey has a higher than average provision of Class A4 (pub/bar) uses. Bracklesham has a significantly higher than average provision of Class A5 uses, although when combined with East Wittering (given the proximity of the centres), this is reduced to 10.9%. This is however still above the national average. Given the competing pressures for retail and non-retail uses and the low vacancy rates (except for Selsey), a balance between Class A1 and Class A3 to A5 uses needs to be maintained to ensure centres continue to fulfil their current roles.

5.7 With specific regard to Chichester city centre, there is a concentration of restaurants along South Street, including Wildwood, Zizzi, Prezzo, Cote, Wagamma, Wahaca and Pizza Express. There are also several public houses along South Street. There is a more limited number of cafés in this area.

Food and Beverage Expenditure

5.8 Experian's food and beverage expenditure per capita projections are shown in Table 2, Appendix 4. The total food and beverage expenditure in the study area is £462.27 million in 2018, as shown in Table 3, Appendix 4.

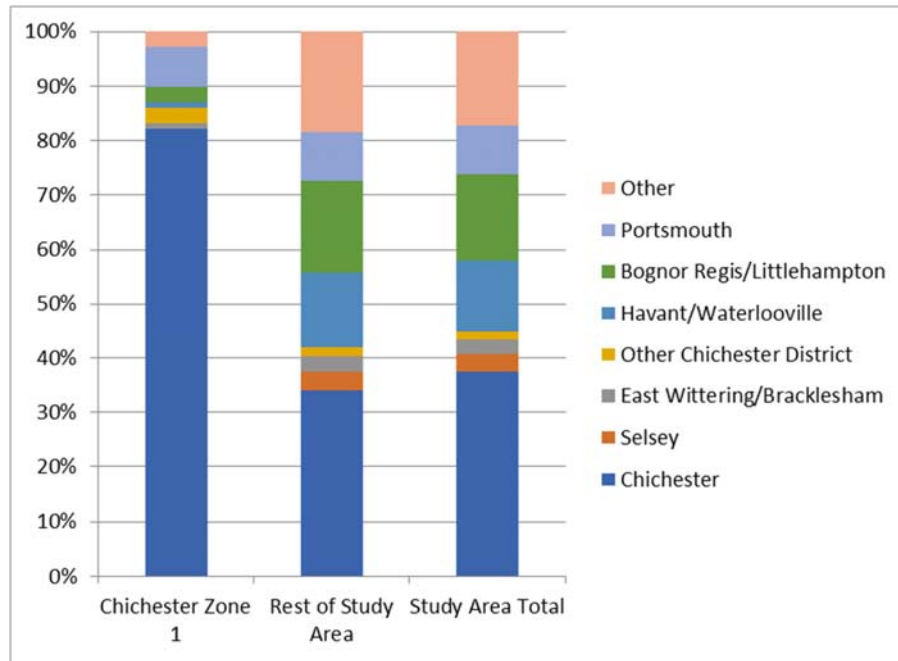
5.9 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 23% between 2018 and 2036. Accounting for population growth, total food and drink expenditure within the study is expected to increase from £462.27 million in 2018 to £642.9 million by 2036, an increase of 39% (Table 3, Appendix 4).

Food and Beverage Expenditure Patterns

5.10 A summary of food and beverage expenditure patterns is shown in Figures 5.1 (restaurant/cafés), 5.2 (pubs/bars) and 5.3 (hot food takeaways). The results indicate that the retention of food and beverage trips within Chichester city centre is higher than for comparison goods shopping, particularly in Zone 1 (Chichester/Tangmere). Chichester city centre is the main food and beverage destination in the District, although residents also have access to a wide variety of villages and smaller centres, such as Selsey, East Wittering/Bracklesham.

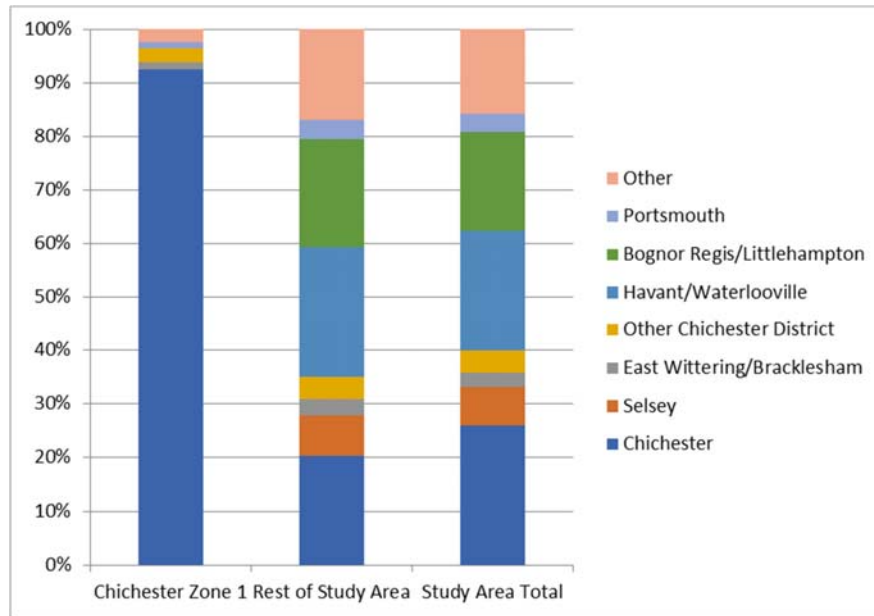
5.11 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2018) penetration rates are shown in Table 4, Appendix 4 and expenditure patterns are shown in Table 5, Appendix 4. The estimated expenditure currently attracted to facilities within Chichester District is £166.94 million in 2018.

Figure 5.1 Restaurant/Café Destinations (destination named by respondents)



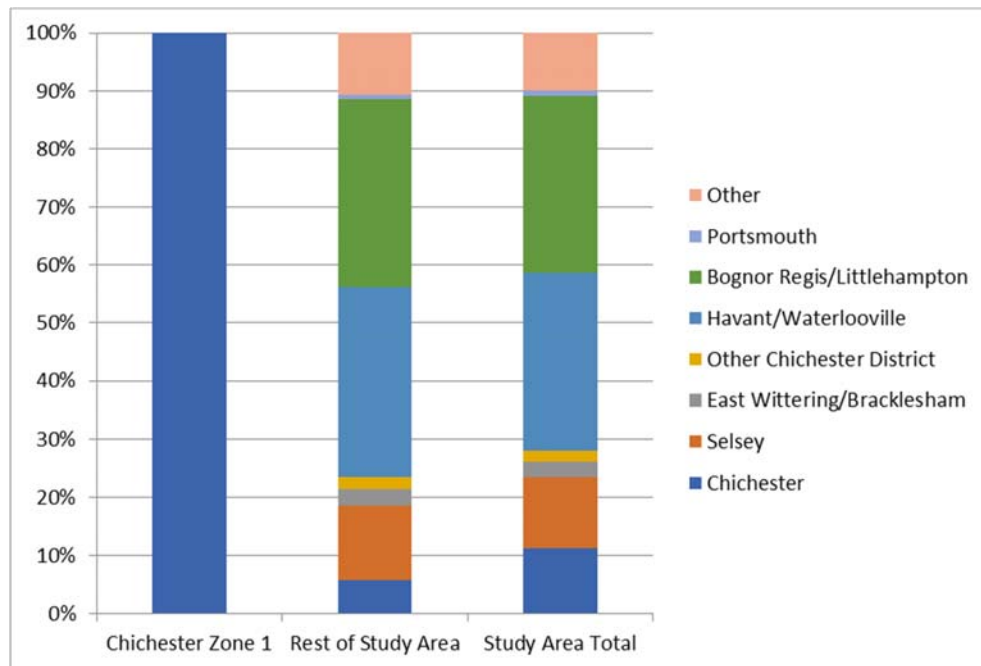
Source: NEMS Household Survey, January 2018

Figure 5.2 Pub/Bar Beverage Destinations (destination named by respondents)



Source: NEMS Household Survey, January 2018

Figure 5.3 Hot Food Takeaway Destinations (destination named by respondents)



Source: NEMS Household Survey, January 2018

Future Capacity for Food and Beverage Floorspace

5.12

The household survey suggests that the District's retention of food and beverage expenditure is lower than for convenience goods but higher than the retention of comparison goods expenditure. The levels of food and beverage expenditure retention are high in Zone 1

(Chichester/Tangmere) at around 91% and in Zone 3 (Selsey/East Wittering/Bracklesham) also at around 91%. The food and beverage expenditure retention is lower in Zone 2 (Hayling Island/South Downs/Southbourne) at 45%, Zone 4 (Bognor Regis) at 23%, Zone 6 (Arundel/Littlehampton) at around 17%, Zone 5 (South Downs (North)) at around 12% and Zone 7 (Waterlooville/Havant) at around 11%. In Zone 2 there is a high level of leakage to Havant/Waterlooville. Overall, Chichester District has high levels of expenditure retention, although some development will be necessary in the Chichester to maintain the existing market share in the future. Town centre strategies could therefore focus on maintaining the market share for the District.

- 5.13 Available food and beverage expenditure has been projected forward to 2021, 2026, 2031 and 2036 in Tables 6 to 9 in Appendix 4, and summarised in Table 11. Available food and beverage expenditure to facilities within the District is expected to increase from £166.94 million in 2018 to £199.68 million by 2036.
- 5.14 For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2018 (i.e. satisfactory levels). Table 12, Appendix 4 then assumes that the turnover of food and beverage facilities will increase in real terms in the future. Growth in turnover efficiency is a function of spending growing at faster rates than new floorspace provision, as well as operators' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Allowing for this growth to be absorbed by existing food and beverage uses represents a cautious approach to forecasting future needs, helping existing centres maintain their vitality and viability and compete with new provision.
- 5.15 Unlike convenience and comparison retailing, Experian does not provide any advice on growth in turnover efficiency for food and beverage floorspace. However, it is important that existing facilities can increase their turnover over time. Considering the forecast expenditure per capita growth rates in the leisure sector, and the need to ensure that new spending is also available to support new facilities, a rate of 1% per annum is adopted for turnover efficiency of existing floorspace.
- 5.16 By 2021, within Chichester District, there will be a food and beverage expenditure surplus of £3.97 million, which grows to £12.84 million by 2026, £23 million by 2031 and £33.52 million by 2036. These expenditure projections have been converted into floorspace projections in Table 12, Appendix 4, adopting an average sales density of £5,000 per sq.m gross, which is again projected to grow by 1% in the future due to improved turnover efficiency.
- 5.17 Surplus expenditure at 2021 could support 771 sq.m gross of additional food and beverage floorspace and 2,371 sq.m gross by 2026. In the longer term, surplus expenditure at 2031 could support 4,042 sq.m gross, increasing to 5,605 sq.m gross by 2036. The results are summarised in Table 5.2 below.

Table 5.2 Summary of Food and Beverage Floorspace Projections (sq. m Gross)

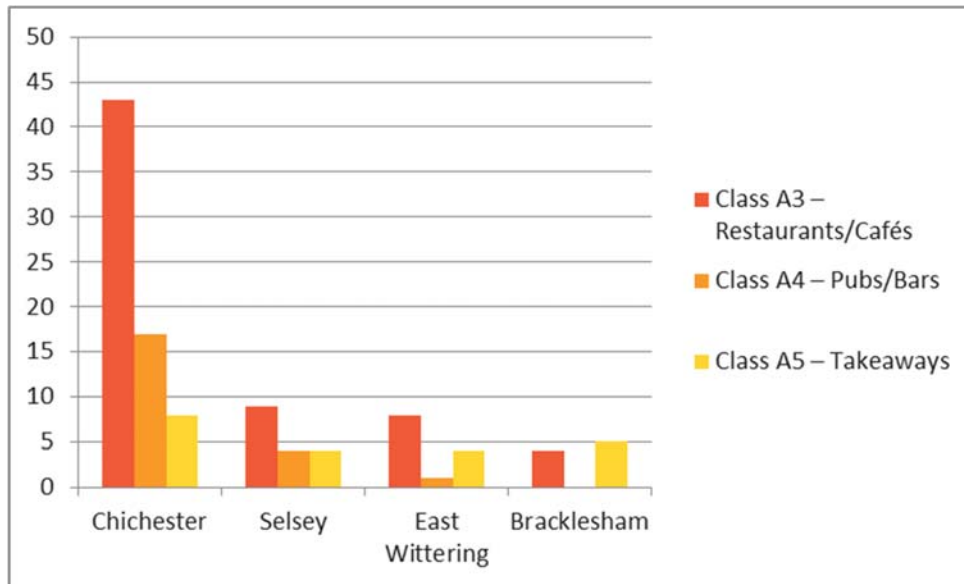
Centre	Additional Floorspace (sq.m Gross)			
	By 2021	By 2026	By 2031	By 2036
Chichester	634	1,955	3,335	4,624
Selsey	62	187	316	438
East Wittering/ Bracklesham	30	92	155	214
Other Chichester District (rural)	44	138	236	329
Total	771	2,371	4,042	5,605

Source: Table 12, Appendix 4

Qualitative Need

- 5.18 Chichester city centre's Venuescore food/service index (2016/17) is 82 compared with the national average of 100. In 2015/16, the food/service index was 79 which had increased from 67 in 2013/14. These figures suggest food service in Chichester have improved, but remain behind the average for a centre of its size.
- 5.19 The other main centres (i.e. Selsey, East Wittering, Bracklesham) do not feature on Venuescore, which reflects the predominance of independent food and beverage uses rather than multiple/chains.
- 5.20 The proportional mix of Class A3-A5 uses within the main centres indicates:
- 1 **Chichester** has a slightly higher provision of Class A3 uses when compared with the national average. The proportion of Class A4 and Class A5 uses is below the national average. There is a predominance multiple/chain food and beverage outlets, particularly along South Street.
 - 2 **Selsey** has a slightly higher provision of Class A3 and Class A4 uses when compared with the national average. The proportion of Class A5 uses is slightly below the national average.
 - 3 **East Wittering** has a higher provision of Class A3 uses when compared with the national average. The proportion of Class A4 uses is significantly below the national average and the proportion of Class A5 uses is just below the national average.
 - 4 **Bracklesham** has a significantly higher provision of Class A3 uses when compared with the national average. There are no Class A4 uses. The proportion of Class A5 uses is also significantly higher than the national average. The higher than average provision of Class A5 uses in Bracklesham, reflects its location adjacent to the sea front as it is a popular tourist destination (it also serves local service needs).
 - 5 When looking at **East Wittering/Bracklesham combined** (given their proximity to each other), the proportion of Class A3 uses is 14.1%, which is significantly above the national average. The proportion of Class A4 uses is 1.2%, significantly below the national average and the proportion of Class A5 uses is 10.6%, significantly above than the national average.
- 5.21 There are 107 food and beverage outlets within the main centres. In addition, there are many country/village pubs throughout the District and in the smaller centres. The town centre health check/audits in Section 7 provide a more accurate analysis of food and beverage provision within the main centres. The number of food and beverage outlets within each centre is shown in Figure 5.4 below.

Figure 5.4 Class A3 to A5 Food and Beverage Outlets in each Centre



Source: Experian Goad for Chichester (May 2017) and Lichfields' Site Visit (February 2018)

Conclusions

5.22

The projections indicate capacity for additional food and beverage floorspace in Chichester District, primarily located in Chichester city centre (up to 4,624 sq.m gross by 2036). The potential is more limited in the smaller centres in the District (200 to 400 sq.m gross by 2036).

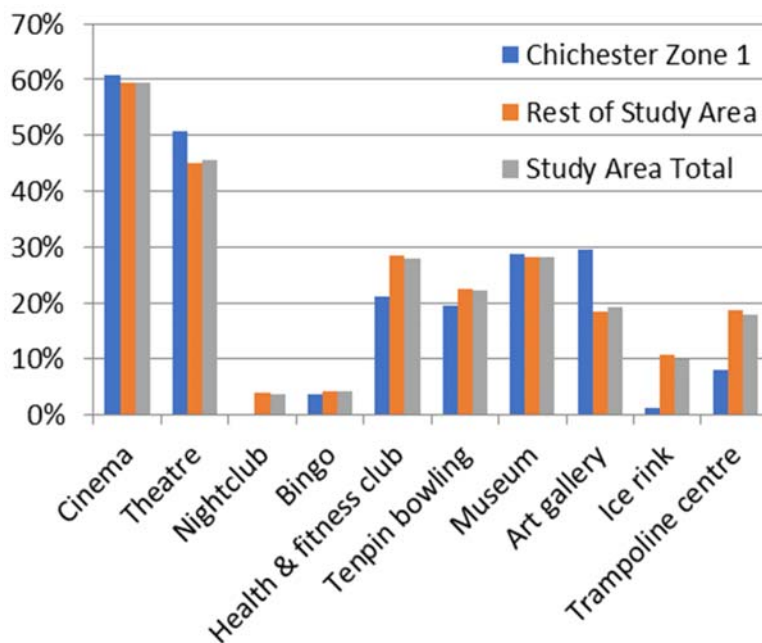
6.0 The Need for Other Town Centre Uses

Introduction

6.1 This section assesses the potential for commercial leisure and town centre uses in Chichester District, including theatres, cinemas, ten pin bowling, bingo, health and fitness, trampoline centres, art galleries, museums and ice rinks.

6.2 Household survey respondents were asked about their family's leisure activities. The participation rates within the study area are shown in Figure 6.1 below and an assessment of these sectors is set out in this section.

Figure 6.1 Leisure Participation (% of Respondents)



Source: NEMS Household Survey, January 2018

6.3 Within Chichester Zone 1, the household survey identifies that visiting the cinema is the most popular leisure activity (61%), followed by visiting the theatre (51%), art galleries (30%), museums (29%) and health and fitness clubs (21%). Participation rates in the rest of the study area for cinemas, bingo and museums are in line with the participation rates for Chichester Zone 1. The participation rates for art galleries and theatres is however higher in Chichester Zone 1 than in the rest of the study area, which may reflect higher levels of access to these facilities within Chichester. The participation rates for nightclubs, health and fitness, ice rinks and trampolining are all lower in Chichester Zone 1 than in the rest of the study area, but the number of respondents for these activities is low.

Commercial Leisure Uses

6.4 Residents in Chichester District have good access to a range of commercial leisure and entertainment facilities within the District and in the surrounding area, in particular Chichester Gate which has a cinema, bowling alley, gym and a variety of restaurants. Outside the District, there is Bognor Regis Retail Park, Havant Retail Park, the Pompey Centre in Southsea, Gunwharf Quays in Portsmouth and the Boardwalk in Port Solent – all of which offer

commercial leisure facilities. There are also the nearby town centres of Bognor Regis, Portsmouth, Littlehampton and Waterlooville.

- 6.5 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from clustering together within leisure parks.

Cinemas

- 6.6 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2016 national average was 2.6 trips per person per annum.

- 6.7 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 210 trips per seat per annum.

- 6.8 Residents in Chichester District have a limited choice of cinemas, with only the following cinemas:

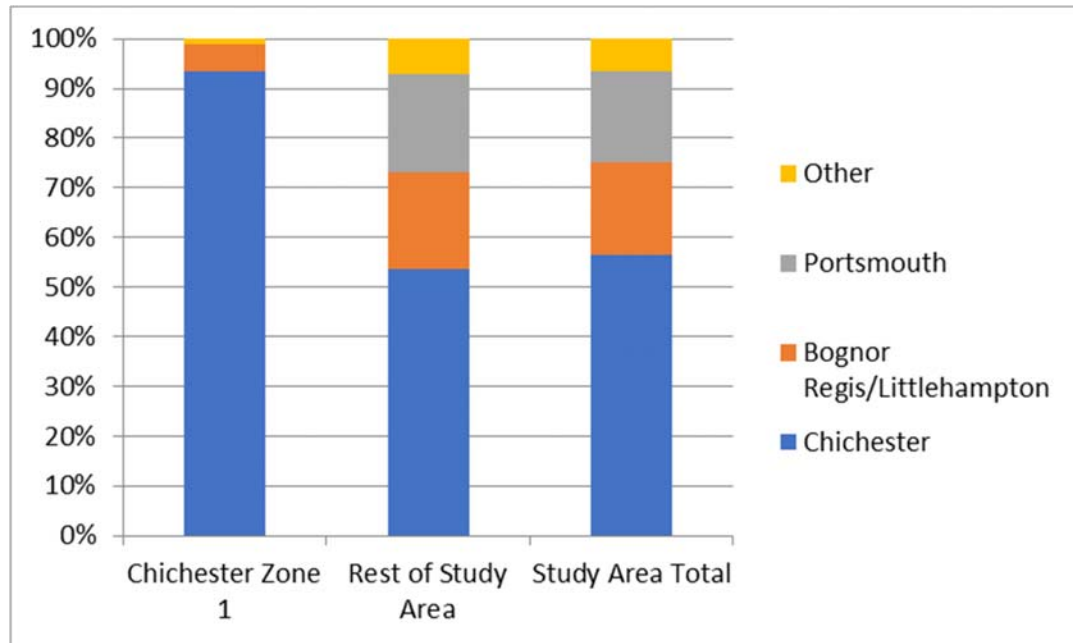
- 1 Cineworld at Chichester Gate, Chichester providing 10 screens and 1,921 seats; and
- 2 Chichester Cinema, Chichester city centre, providing 1 screen and 114 seats.

In the wider study area, there are the following cinemas:

- 3 The Picturedrome Cinema, Bognor Regis, providing 2 screens and 468 seats; and
- 4 Windmill Cinema, Littlehampton, providing 1 screen and 230 seats.

- 6.9 The survey results indicate that 59% of households within the study area visit the cinema (41% do not participate in this activity). The main destinations visited by participating households are set out in Figure 6.2 below. The most popular cinema is the Cineworld in Chichester which attracted 47% of cinema trips across the study area. The Picturedrome Cinema in Bognor Regis attracted the next highest level of cinema trips in the study area, at 14%. This was followed by the Chichester Cinema at 8%. Across all zones, the Cineworld in Chichester attracted the highest number of trips.

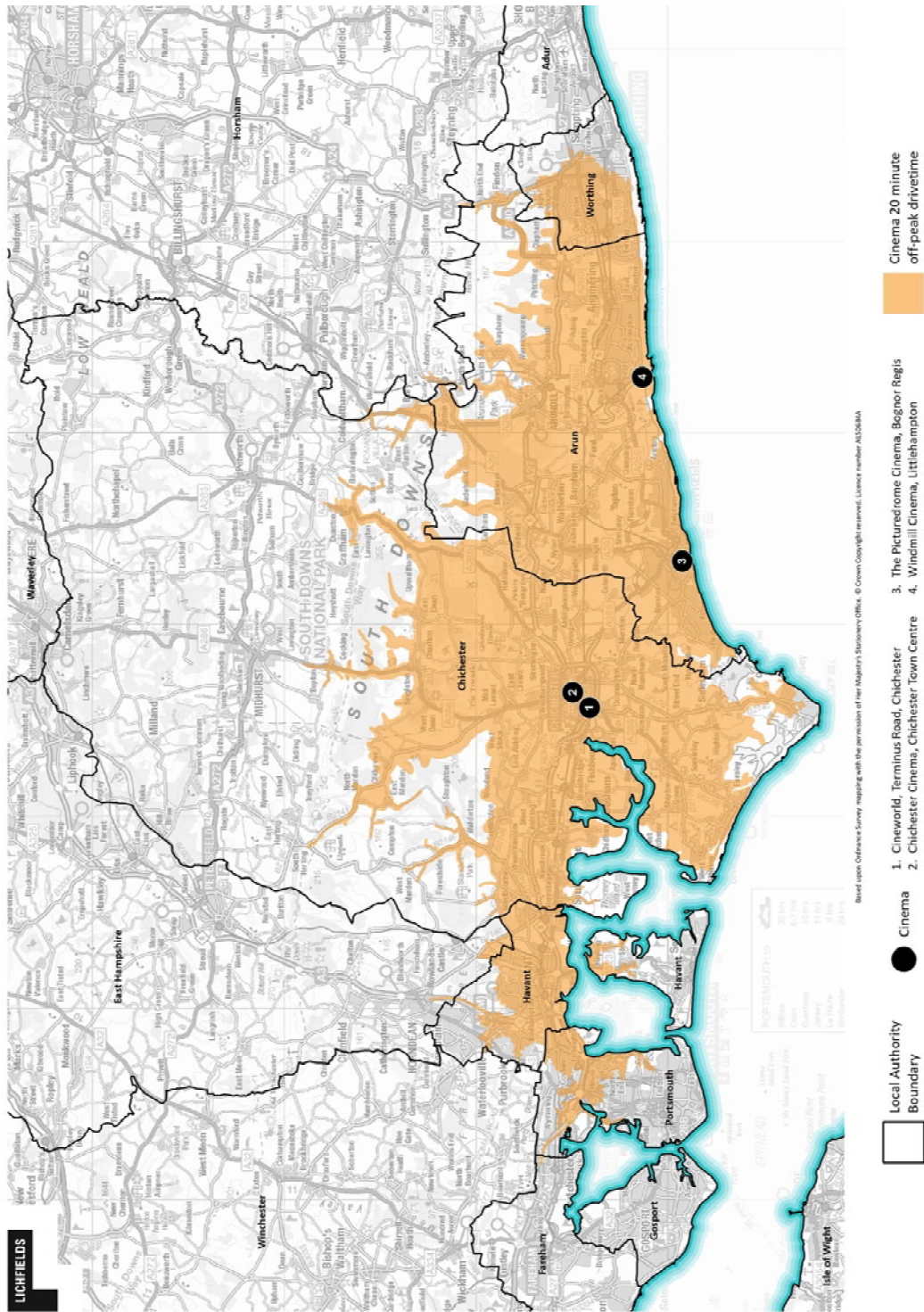
Figure 6.2 Cinema Destinations (cinema destination named by respondents)



Source: NEMS Household Survey, January 2018

- 6.10 A 20-minute drive time isochrone from the most popular cinema destinations have been mapped at figure 6.3 below. This shows that Chichester District is relatively well catered for in terms of cinema provision, particularly in the south of the District, although except for the Selsey area. The main area of deficiency appears to be south of the District.
- 6.11 The study area population in 2018 (406,812 people) will generate 1.058 million cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). Chichester District retains around 57% of the cinema trips generated within the study area i.e. about 602,000 trips. Based on the national average of 210 trips per seat, 602,000 trips per annum would support 2,867 cinema seats, compared with the existing provision of 2,035 seats. This suggests a current shortfall of 832 seats.
- 6.12 By 2036 the study area population (460,319 people) will generate 1.2 million cinema trips, of which 684,000 trips (57% of the total in the study area) could be retained within Chichester District. Based on the national average, these cinema trips could support 3,275 seats, compared with the existing provision of 2,035 seats. The surplus potential at 2036 is 1,240 seats.
- 6.13 These projections suggest that there is theoretical capacity for a medium sized cinema (5-6 screens) in Chichester District over the plan period. Curzon and Everyman are art house cinema operators who have expanded in recent years. The latter has cinemas in Bath, Exeter and Southampton. Curzon has cinemas in Canterbury, Ripon and Sheffield with a new facility proposed in Colchester. The Chichester area may be able to attract such an operator.

Figure 6.3 20 Minute Off Peak Drive Time



Theatres

- 6.14 Within the study area 46% of respondents to the household survey indicated that they visit the theatre. Table 6.1 summarises where respondents stated that they had last visited the theatre. The results demonstrate that Chichester is the main theatre destination in the study area, attracting almost 48% of the theatre trips.

Table 6.1 Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Chichester (Festival Theatre and Minerva Theatre)	47.8
London	18.1
Southampton	8.0
Bognor Regis	4.3

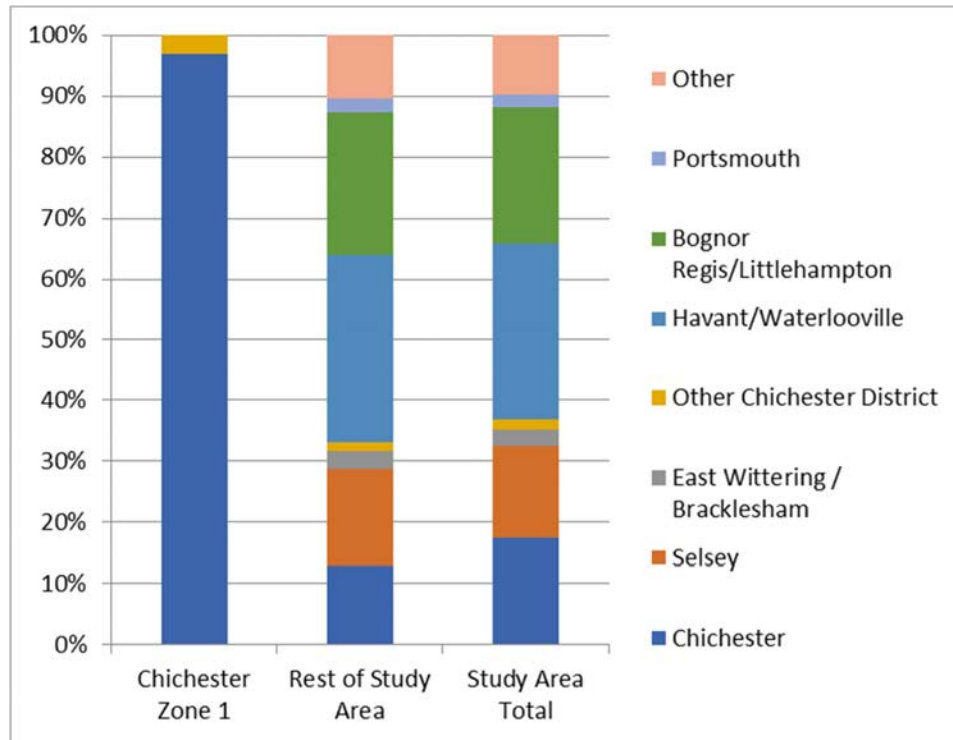
Source: NEMS Household Survey, January 2018

- 6.15 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UK Theatres membership).
- 6.16 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the study area population in 2018 (406,812 people) generates 203,406 theatre trips per annum. The household survey results suggest around 48% of these trips (about 98,000 trips) were attracted to Chichester. This is expected to increase to 110,000 trips by 2036 due to population growth in the study area.
- 6.17 These figures suggest the Festival Theatre and Minerva Theatre in Chichester provide more than adequate provision. There is no clear need for additional theatre provision in Chichester District over the plan period.

Health and Fitness Clubs

- 6.18 Chichester Council is currently reviewing the need for indoor sports facilities in the District and a separate evidence base report is being prepared. The Chichester Indoor Sports Facilities Review 2018 (CISFR) will include fitness gyms as well as other indoor sporting activities.
- 6.19 The 2016 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. It has more clubs, more members and a greater market value than ever before. The 2016 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2016, with an increase of 5.3% in the number of memberships.
- 6.20 The household survey indicates that 28% of respondents or their families visit health/fitness clubs. The household survey undertaken for the CISFR suggests a higher participation rate with 45% of households visiting a fitness gym at least once a month or more often.
- 6.21 Of the participating households, the main destinations mentioned are summarised in Figure 6.3. The results show that Chichester District has a 100% retention rate in Zone 1 (Chichester/Tangmere). In the rest of the study area, the retention rate is significantly lower, at around 33%. Chichester District attracts just over one third (37%) of health and fitness facilities trips within the study area.
- 6.22 The Sport England/Active Places data indicates that there are 18 registered health and fitness suites in the District (including the South Downs area), with 612 fitness stations. Four of these facilities are for private use only. These private use facilities provide 61 fitness stations in total. The remaining 14 registered facilities open to the general public (including registered members) have 551 fitness stations in total as shown in Table 6.2.

Figure 6.4 Health and Fitness Destinations (health and fitness destination named by respondents)



Source: NEMS Household Survey, January 2018

Table 6.2 Health and Fitness Clubs (Sport England/Active Places Data, 2018)

Name	Type	No. Fitness Stations
Bishop Luffa C of E School, Chichester	Private Use	8
Bourne Leisure Centre, Emsworth	Pay and Play	30
Champneys Forest Mere, Liphook	Registered Membership use	22
Chichester College Sports Centre	Registered Membership use	45
Chichester High School, Chichester	Private Use	22
Chichester Park Hotel Leisure Club	Registered Membership use	7
Chichester Racquets and Fitness Club	Registered Membership use	34
Grit Gym MMA & Fitness, Chichester	Registered Membership use	32
Highfield School, Liphook	Private Use	5
Midhurst Rother College, Midhurst	Registered Membership use	15
Nuffield Health, Chichester	Registered Membership use	105
Positive Lifestyle, Petersfield	Registered Membership use	45
Seaford College, Petworth	Sports Club/Community Assoc.	31
Spread Eagle Spa, Midhurst	Registered Membership use	15
Goodwood Hotel/Health Club, Chichester	Registered Membership use	30
The Grange, Midhurst	Pay and Play	50
University of Chichester (Bishop Otter Campus)	Private Use	26
Westgate Leisure Chichester	Pay and Play	90
Total		612

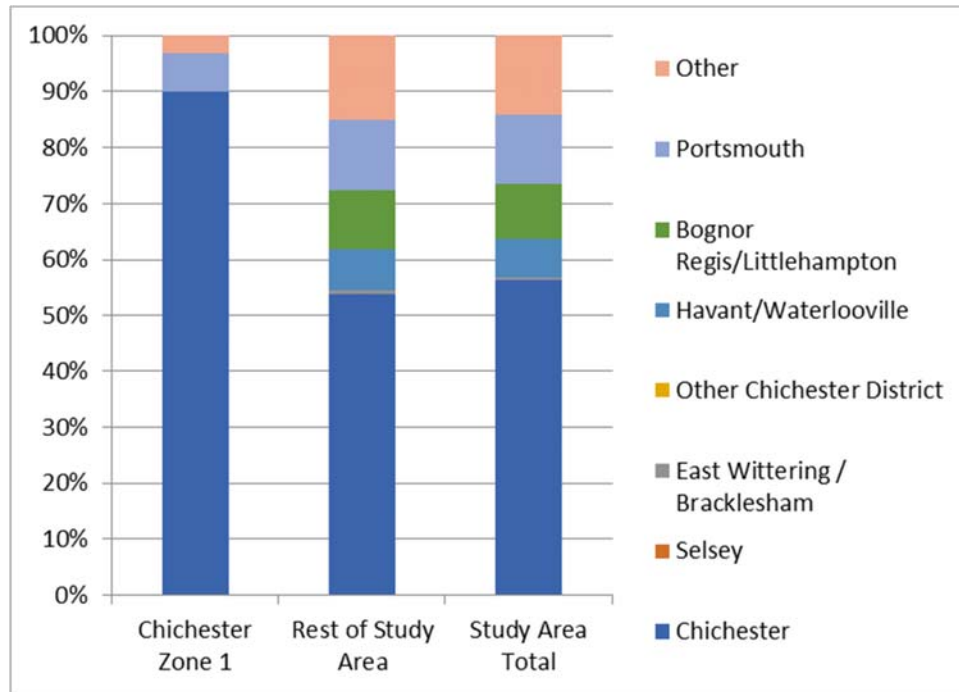
Source: Sport England Active Places

- 6.23 Chichester District's population in 2018 (119,900 people) is projected to grow to 121,400 by 2021, 126,900 by 2026, 131,300 by 2031 and to 135,100 by 2036. The current population (119,900) indicates that Chichester District has 5.1 fitness stations per 1,000 people (612 stations in total). The emerging CISFR suggest a target provision in Chichester of 5 fitness stations per 1,000 people.
- 6.24 The South East of England region has 1,174 registered health and fitness suites with 54,899 fitness stations (average of 32 stations per suite). This existing provision equates to around 6.1 fitness stations per 1,000 people. Chichester has a lower provision of fitness stations (5.1 per 1,000 people) than the regional average (6.1 stations), which suggests health and fitness clubs could be trading above average. However, the CISFR household survey result record 75% of respondents indicated there are enough fitness gyms in Chichester, with only 20% indicating more facilities are needed.
- 6.25 The District population is projected to increase by 7,000 people by 2026 and by 15,200 people by 2036. Based on 5 fitness stations per 1,000 people, this population growth could support 35 new fitness stations by 2026, increasing to 76 stations by 2036. The emerging CISFR suggests scope for a similar number (72 fitness stations) by 2036.
- 6.26 These figures suggest there is scope for one additional health and fitness facility in the District over the plan period. It's notable that those aged over 65 are less likely to use health and fitness facilities and with an aging population the demand for these facilities could potentially decrease in Chichester. However, with membership increasing year on year it is considered that this will likely counterbalance any decrease experienced.

Ten Pin Bowling

- 6.27 The household survey results suggest that 22% of households in the study area visit ten pin bowling facilities. The main destinations are set out in Figure 6.4. The results show that Chichester District has a very high retention rate (around 90%) in Zone 1 (Chichester/Tangmere). In the rest of the study area, the retention rate is lower, at around 55%. Chichester District attracts just over a half (57%) of ten pin bowling trips within the study area.
- 6.28 MFA Bowl with 16 lanes in Chichester is the only bowling alley in Chichester District and attracts around 53% of bowling trips within the study area.
- 6.29 The study area population in 2018 (406,812 people) can in theory support around 34 ten pin bowling lanes, based on the national average of one lane per 12,000 people. By 2036, the study area population (460,319 people) could support 38 lanes.
- 6.30 Based on the District's market share (57%), Chichester's catchment population could support 19 lanes in 2018, increasing to 22 lanes by 2036. Chichester's existing provision (16 bowling lanes) appears to be adequate to meet demand over the plan period. The residual scope at 2026 (6 lanes) is insufficient to support a new facility in the District.

Figure 6.5 Ten pin bowling Destinations (Ten pin bowling destination named by respondents)



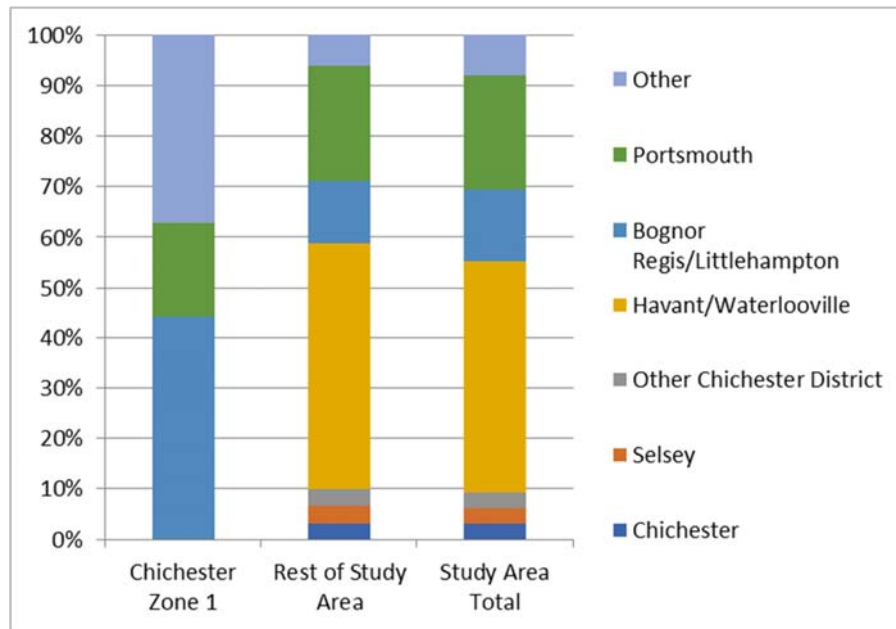
Source: NEMS Household Survey, January 2018

Bingo, Games of Chance and Gambling

- 6.31 The household survey results suggest that only 4% of households in the study area visit bingo facilities, which is lower than the national average participation rate (around 5%). The main destinations are set out in Figure 6.5. The main destinations within the study area are in Havant, Portsmouth and Bognor Regis.
- 6.32 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL). There are no main bingo operators within Chichester District.
- 6.33 The adult (over 18) population in the study area in 2018 (around 330,000 people¹) would generate about 580,000 bingo admissions, based on 80% of the national participation rate (1.4 trips per adult). If Chichester District could retain, as a minimum, one third of bingo trips (154,000 trips) in the study area, in line with the market share for other leisure activities, then there would be theoretical capacity for a large bingo facility in the District, based on national average figures (113,000 admissions per club). Chichester District does not currently have a national bingo operator and therefore there may be scope to attract operators such as Gala and Mecca. The most viable location for this facility is Chichester. The dispersed population in the rest of the District may be unviable for operators.

¹ Based on the proportion of adult population (18+) being 82% - Source: Census 2011 (average of the 18+ population for each zone)

Figure 6.6 Bingo Destinations (bingo destination named by respondents)

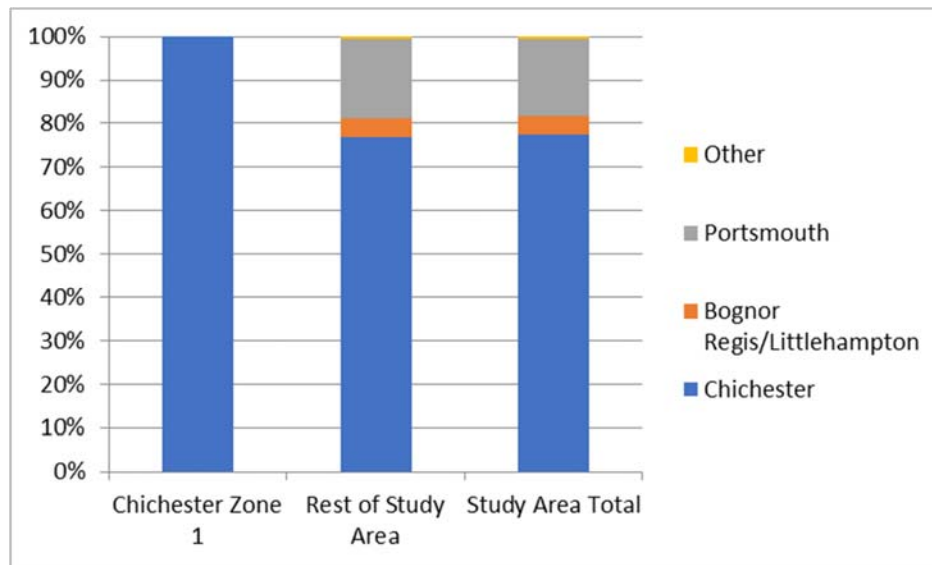


Source: NEMS Household Survey, January 2018

Trampoline Centres

- 6.34 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce on 31 May 2014. The household survey results suggest that 18% of households in the study area visit trampoline centres.
- 6.35 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 6.36 The main destinations in the study area are set out in Figure 6.6. The results show that Chichester District has a 100% retention rate in Zone 1 (Chichester/Tangmere). In the rest of the study area, the retention rate in Chichester District is also high, at around 77%.
- 6.37 In Chichester, there are currently two trampoline centres – Flip Out to the east of the town centre and Air Arena to south west of the town centre. Chichester District is well served by existing provision, as suggested by the high retention rates, however this may not preclude further uses coming forward over the plan period. There is increasing demand for these uses nationally.

Figure 6.7 Trampoline Centre Destinations (trampoline centre destination named by respondents)



Source: NEMS Household Survey, January 2018

Other Leisure, Entertainment and Cultural Uses

- 6.38 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, casinos, ice rinks, tourist attractions and new emerging leisure activities such as family entertainment centres, escape rooms and virtual golf centres. The representation of these uses is currently limited in Chichester. Given the fragmented nature of these sectors it is difficult to quantify the potential demand for these uses over the plan period.
- 6.39 The household survey results suggest that total participation rates in the study area is around 10% for ice skating, 19% for art galleries and 28% for museums. The study area population is significant (406,812 people projected to increase to nearly 460,319 people by 2036), and provides a critical mass to attract a broad range of leisure, entertainment and cultural uses. Chichester benefits from many tourist visitors. This could generate demand for additional hotel and conference facilities. Hotel facilities within Chichester are relatively limited for a city of its size. There is a Travelodge in the city centre but most other establishments are small hotels, B&B or guesthouses. There is a lack of high quality hotels with conference facilities.
- 6.40 The nightclub/live music sector has struggled in recent years. IBIS World suggests have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing. Despite these national trends there is qualitative scope to provide nightclub facilities in Chichester.
- 6.41 The development strategy needs to be flexible and can to response to emerging opportunities for new facilities of this kind, particularly in Chichester city centre. The need for a mix of uses is supported by the Chichester Vision.

Town Centre Offices

- 6.42 National Guidance defines offices as main town centre uses. Their location in a town centre is beneficial, on the basis that office buildings tend to be used more intensively than other forms of employment uses and therefore generate more activity in the town centre, supporting vitality and viability. Whilst the District is not perceived as a significant office location, demand does exist in Chichester for small scale office development. The Local Plan should consider identifying development opportunities within and on the edge of Chichester city centre to accommodate this demand over the plan period.

Residential

- 6.43 Residential development can play an important role in ensuring the vitality of its centres and as such, it may be appropriate to encourage residential development on suitable sites to increase the amount of people living in and therefore supporting the town centre's services and facilities.
- 6.44 A greater population could help to support the evening economy, particularly the food and beverage sector.

Conclusions

- 6.45 A summary of the key findings in this Section is set out below:
- There is theoretical capacity for a medium sized cinema (5-6 screens) in Chichester District over the plan period.
 - There is scope an additional health and fitness facility in the District over the plan period.
 - The existing provision of ten pin bowling in the District (16 bowling lanes) appears to be adequate to meet demand over the plan period.
 - There is theoretical capacity for a bingo facility in the District, with Chichester being the most likely location for this facility.
 - Other uses such as hotels, conference facilities, nightclubs, museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities could be appropriate over the plan period. The development strategy needs to be flexible to respond to emerging opportunities for new facilities of this kind, particularly in Chichester city centre.
 - The Local Plan should consider identifying development opportunities for other uses such as offices and residential uses over the plan period.

7.0 Chichester City Centre

Chichester Key Functions

- 7.1 The adopted Chichester Local Plan identifies Chichester is a City Centre, and the main settlement in the District. The city is renowned for its Cathedral, historic heritage, University and is the largest centre of employment in the District. The vision for Chichester indicates the District attracts around 6.2 million visitors a year. These visitors generate a significant amount of expenditure. Chichester is an important destination for shopping needs, including many specialist shops, the financial and legal sector and coffee shops and restaurants.
- 7.2 Local Plan Policy 10 (Chichester City Development Principles) states new development, infrastructure and facilities will be planned for Chichester city that enhances the city's role as a sub-regional centre and visitor destination. New development will contribute to meeting local needs, and conserve and enhance the city's historic character and heritage.
- 7.3 Chichester has a good selection of retail and service uses and its key roles include:
- **Convenience** – within the city centre, there is a limited convenience offer. The key offer includes an edge of centre Waitrose (2,180 sq.m), Marks & Spencer East Street Foodhall (536 sq.m), Iceland (428 sq.m) and Tesco Express (220 sq.m). These stores are supplemented by independent sandwich bars, newsagents and bakeries. Outside the city centre, there are several large convenience stores, including a Tesco Extra to the west of the town centre (6,667 sq.m), Lidl at Portfield Retail Park (886 sq.m), an M&S Foodhall at Portfield Retail Park (840 sq.m), Sainsbury's at Barnfield Drive (6,281 sq.m), Iceland at Barnfield Retail Park (667 sq.m) and a relatively new Aldi also at Barnfield Retail Park (993 sq.m).
 - **Comparison** – the main comparison units are located along the pedestrianised areas of East Street and North Street, as well as along West Street. Outside the pedestrianised areas, the trading mix is more diverse, incorporating many local retailers, financial services, restaurants and some national multiples (particularly along South Street). Given the historic nature of the city centre, there are a limited number of large anchor stores – TK Maxx, House of Fraser, Marks and Spencer (North Street), Boots, New Look and Next occupy the largest units. There is a good range and choice of national multiples in the town centre.
 - **Services** – there are a range of service uses present in the town centre, including beauty salons, hairdressers, travel agents, banks, estate agents, betting offices and solicitors. The banks are represented by most of the national multiples.
 - **Food and Beverage** – there is a good range of food and beverage uses present in the town centre, comprising a mix of cafés, restaurants, bars and public houses. Several national restaurant chains can be found, including Zizzi's, Ask, Wildwood, Wahaca, Prezzo, Pizza Express and Carluccio's. Despite it being a university town and a tourist destination, there is a more limited choice of bars and nightclubs.
 - **Entertainment/Leisure** – the Festival Theatre and the Minerva Theatre are located to the edge of the city centre and in the centre, are the Cathedral, Novium museum, a single screen cinema and two art galleries. Outside of the town centre is a large cinema (Cineworld), a bowling alley (MFA Bowl) and two trampoline centres (Air Arena and Flip Out).
 - **Other** – the centre provides a range of other (non-Class A uses) which provide valuable services to local residents and tourists. Such uses comprise hotels, a library, dental surgeries, churches and social clubs.

- 7.4 The convenience goods expenditure attracted to Chichester city centre is over £208 million in 2018 (Table 5, Appendix 2), which is 82% of the total convenience goods spending attracted to Chichester District's facilities stores. Most (80%) of this trade is attracted to Chichester's out of centre food stores. The convenience goods turnover attracted by the town centre is around £40 million in 2018, of which two thirds is taken by Waitrose.
- 7.5 The comparison goods expenditure attracted to Chichester city centre much more significant at £379 million in 2018 (Table 5, Appendix 3), equivalent to 76% of the total comparison goods spending in Chichester District. Food and beverage expenditure attracted to Chichester is £139 million in 2018 (Table 5, Appendix 4), 83% of the total food and beverage spend within Chichester District. The combined turnover of Chichester city centre is over £550 million. This indicates Chichester city centre's role as the main shopping, food and beverage and leisure destination in the study area.

Venuescore

- 7.6 In terms of Venuescore ranking (2016/17), Chichester city centre is at the top of the hierarchy in the region, ranked 74th in the UK. This places Chichester above centres such as Portsmouth (101st), Worthing (104th), Winchester (125th), Bognor Regis (398th), Petersfield (416th), Havant (473rd), Littlehampton (799th) and Haslemere (1,074th).
- 7.7 By way of comparison, Chichester city centre was ranked at 83rd in the UK in 2015/16, 98th in 2013/14 and 115th in 2010/11. This suggests that the centre has been improving in relation to other centres nationally.

Mix of Uses and Retailer Occupation

- 7.8 Within Chichester city centre there are 433 Class A units. The diversity of Class A units within the centre (Goad - May 2017) is set out in Table 7.1, and the results are compared with the national average (2017).

Table 7.1 Chichester - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Class A1 - Comparison	204	47.1	33.4
Class A1 – Convenience	31	7.2	10.4
Class A1 - Service	52	12.0	13.0
Class A2 – Financial and Prof. Services	46	10.6	11.8
Class A3 – Restaurants/Cafés	43	9.9	9.5
Class A4 – Pubs/Bars	17	3.9	4.6
Class A5 – Takeaway	8	1.8	6.0
Vacant (Class A1-A5)	32	7.4	11.2
Total	433	100.0	100.0

Source: Experian Goad for Chichester (May 2017) and Experian Goad 2017 national average

- 7.9 In line with its role at the top of the shopping hierarchy, Chichester has a high proportion of Class A1 comparison units, significantly above the national average, whilst the proportion of Class A1 convenience units is below the national average. The convenience offer is dominated by large units i.e. Waitrose, Iceland and Marks & Spencer Foodhall. Other national convenience stores are represented outside the town centre. The Class A1 and Class A2 non-retail service offer are comparable with the national average. There is a low provision of Class A5 takeaways. The Class A3 and A4 food and beverage offer is similar to the national average.

- 7.10 The vacancy rate (7.4%) is significantly below the national average of 11.2%, suggesting the town centre is healthy with a good balance between the supply of shop premises and occupier demand. The 32 vacant units are generally spread through the centre and there are no obvious concentrations. Many of the vacant units are under-alteration and there appear to be few long-term vacancies.

Retailer Representation

- 7.11 Chichester has a high number of comparison shops (204 out of 433 units), significantly above the national average. Table 7.2 provides a breakdown of the comparison shop units by category and compares this to the Goad national average.

Table 7.2 Chichester - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Clothing and footwear	67	32.8	24.5
Furniture, carpets and textiles	12	5.9	7.7
Booksellers, arts, crafts and stationers	15	7.4	5
Electrical, gas, music and photography	17	8.3	9.6
DIY, hardware and homeware	10	4.9	7.1
China, glass, gifts and fancy goods	8	3.9	7.5
Cars, motorcycles and motor accessories	0	0	0.5
Chemists, drug stores and opticians	15	7.4	10.9
Variety, department and catalogue	6	2.9	1.7
Florists, nurserymen and seedsmen	2	1.0	2.1
Toys, hobby, cycle and sports	10	4.9	5.5
Jewellers	16	7.8	5.2
Charity and second-hand shops	17	8.3	9.6
Other comparison retailers	9	4.4	3.1
Total	204	100.0	100.0

Source: Experian Goad for Chichester (May 2017) and Experian Goad 2017 national average

- 7.12 All the GOAD plan categories are represented within the centre, apart from the cars/motorcycles /motor accessories, although there is a Kwik Fit car garage in the centre. There is a good choice of outlets in each category particularly clothing/footwear. The choice in some of the other categories is more limited such as florists. However, there are no obvious gaps in provision.
- 7.13 The national multiple retailers are concentrated along the pedestrianised areas of East Street and North Street. They can also be found along West Street and South Street. The number of multiple comparison retailers is considered good reflecting Chichester's size and role. The multiple comparison retailers include:

Table 7.3 Chichester - National Multiples

The Works	Game	Boots	Superdrug
Jo Maman Bebe	Waterstones	H&M	EE
Joules	TK Maxx	Edinburgh Woollen Mill	Three
White Stuff	Rohan	Blacks	L'Occitane
Cotswold	Mountain Warehouse	Topman	Space NK
House of Fraser	Marks & Spencer	Robert Dyas	WHSmith
Cath Kidston	Clarks	Ecco	O2
Jones Bootmaker	Russell and Bromley	Magnet	Vodafone
Card Factory	Clintons	Poundland	Lush
Lakeland	Ernest Jones	H Samuel	The Body Shop

Pandora	Crew Clothing	Fat Face	Sports Direct
Jack Wills	New Look	Next	Carphone Warehouse
River Island	Accessorize	Claire's	Crabtree & Evelyn
Gerry Webber	Jigsaw	Moss	Molton Brown
Mint Velvet	Monsoon	Oasis	
Phase Eight	Sea Salt	Sweaty Betty	
Topshop	Wallis	HMV	

Source: Experian Goad for Chichester (May 2017)

Service Representation

- 7.14 Chichester city centre has a good range of non-retail service uses, with a choice of providers across all the Goad categories, as shown in Table 7.4 below.

Table 7.4 Chichester - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Restaurants/Cafés	43	26.7	24.4
Fast food/takeaways	8	5.0	15.5
Pubs/bars	17	10.6	7.2
Banks/other financial services	20	12.4	11.5
Betting shops/casinos	5	3.1	3.9
Estate agents/valuers	21	13.0	9.7
Travel agents	4	2.5	2.3
Hairdressers/beauty parlours	41	25.5	23.4
Laundrettes/dry cleaners	2	1.2	2.1
Total	161	100.0	100.0
Other	6		
Overall Total	167		

Source: Experian Goad for Chichester (May 2017) and Experian Goad 2017 national average

- 7.15 Overall the range and choice of service uses in Chichester is good, with most categories comparable or slightly better than with the national average. The choice of facilities in each sector is extensive. The proportion of betting shops/casinos and laundrettes/dry cleaners is below the national average.
- 7.16 The restaurant/café offer has improved in recent years and there are several national chains represented within the city centre, including Zizzi's, Ask, Wildwood, Wahaca, Prezzo, Pizza Express and Carluccio's. These chain outlets are supplemented by a range of independent restaurants/café, which provides a good balance. The proportion of fast food/takeaways is significantly below the national average, but there is still a choice of outlets available.
- 7.17 The evening economy is supported by many bars, public houses, leisure and other entertainment attractions. The centre is under represented by bars/nightclubs, especially as a University town and tourist destination.

Commercial Rents

- 7.18 According to the VOA, Zone A retail rents vary significantly throughout the centre. East Street has the most consistent level of Zone A rents which vary from around £1,200 per sq.m to £1,700 per sq.m. Zone A rents along North Street vary from around £110 per sq.m to £1,700 per sq.m, whilst Zone A rents along South Street vary from around £120 per sq.m to £1,000 per sq.m and Zone A rents along West Street vary from around £300 per sq.m to £1,400 per sq.m.

7.19 VOA prime Zone A rents in Chichester compare with other centres in the region as follows:

1	Southampton	£3,000 psm;
2	Guildford	£2,850 psm;
3	Winchester	£1,750 psm;
4	Chichester	£1,700 psm;
5	Worthing	£800 psm;
6	Horsham	£785 psm;
7	Havant	£370 psm;
8	Littlehampton	£350 psm;
9	Waterlooville	£350 psm.

7.20 VOA data indicates Chichester is a higher order centre with relatively high rental values. Rental values are below those achieved in major regional centres e.g. Southampton and Guildford, but significantly above middle and lower tier centres.

Chichester Street Markets

7.21 Several markets are held in Chichester city centre as follows:

- 1 Weekly Wednesday market along North Street and East Street;
- 2 Weekly Saturday market in the Cattle Market car park; and
- 3 Farmers market on the 1st and 3rd Friday of every month.

7.22 The markets create additional footfall in the town centre on market days.

Characteristics of the Shopping Area

7.23 The main shopping area of Chichester is characterised by a predominance of small shops with narrow frontages. Most of the buildings are two or three storeys in height. Many of the buildings are listed and the whole of the centre is located within a Conservation Area. The main primary and secondary shopping areas of Chichester are compact, with the majority spread across North Street, East Street, South Street and West Street, intersected by the Market Cross (see below). The primary shopping areas comprise mainly Class A1 national multiple retailers, whilst the secondary shopping areas contain smaller stores mostly run by independent retailers.



7.24 The Primary Shopping Frontage runs along the following streets:

- 1 North Street - East side from St. Peters South to No.87
- 2 North Street - West side from No.1 to No.37
- 3 South Street - East side from No.43 to No.75
- 4 South Street - West side from No.1 to No.41
- 5 East Street - North side from No.1 to Eastgate Square
- 6 East Street - South side from No.94 to 13 Eastgate Square
- 7 West Street - North side from No.1 to No.4
- 8 Crane Street - both sides

7.25 The Secondary Shopping Frontage runs along the following streets:

- 1 North Street - East side from No.63 to Priory Lanes
- 2 North Street - West side from No.38 to No.49
- 3 Southgate - East side from 42 South Street to 1 Market Avenue
- 4 Southgate - West side from No.8 to No.29
- 5 Eastgate Square - North side from Old Swimming Pool to 3 St. Pancras
- 6 Eastgate Square - South side from No.10 to No.12
- 7 Market Road - West side from No.4 to No.13
- 8 The Hornet - South side from No.4 to No.48
- 9 No.156 St. Pancras to No.27 The Hornet
- 10 Little London - East side from No.35 to No.42
- 11 Little London - West side from No.1 to No.3
- 12 St. Martin's Street
- 13 West Street - from No.5 to No.18

7.26 Since the previous study (2010), the redevelopment of the Shippams building on East Street has enabled large multiples to operate in the centre (i.e. H&M and New Look). A small shopping mall off East Street has also been converted to enable occupation by TK Maxx. Eastgate Swimming Pool/New Park Road has been developed into Eastgate Square where a concentration of restaurants and cafés is occurring (Carluccio's and Brasserie Blanc).





7.27 Overall, Chichester is an attractive shopping destination with a distinctive and diverse architectural character. The centre is largely pedestrianised and easy to navigate on foot, using the Market Cross as a point of reference. Throughout the centre, amenities are provided for visitors, including car parks, public toilets, seating, bins, cycle parking, planting and open green space. The Vision for Chichester is seeking to improve the environment through a more coordinated approach with a greater sense of quality in design and materials.

7.28 In terms of paving, a variety of different surfaces are present within the centre, some higher quality than others (including stone, concrete slabs and brick paving). Much of the shopping area is pedestrianised, with stone and brick paving. Along West Street and South Street, the road has been brick paved.



7.29 The sense of arrival from the railway station is poor and therefore does not create a good first impression for visitors arriving in Chichester from the south; there is no clear pedestrian route into the town centre and this area appears run down and congested with vehicular traffic. The railway line also presents a barrier to movement, although there is a pedestrian bridge over the crossing. Measures to ease vehicular traffic, establish more prominent pedestrian linkages into the town centre and improve the first impression when arriving into Chichester should be considered. Once in the centre, the Cathedral and gardens, historic buildings and Market Cross create a positive impression.

7.30 Rationalisation of the public realm/visitor amenities would also be beneficial to help create a higher quality environment, consistent with the centre’s heritage, character and attractive environment. Extensions of the pedestrianised areas should also be considered, particularly along East Street and North Street to aid linkages to the Festival Theatre and Minerva Theatre.

Accessibility and Movement

7.31 There is a choice of car parking in the town centre; these car parks are dispersed around the town centre and are conveniently located close to the main shopping areas. A map showing the location of the car parks can be found below.



7.32 Chichester city centre is well served by buses, with a bus station to the south of the centre. There are services to the surrounding local areas, as well as destinations further afield, such as Petworth, Bognor Regis, Littlehampton, Worthing and Brighton.

7.33 Chichester city centre has a railway station to the south, within close walking distance of the main shopping areas. This provides services to London, Southampton, Portsmouth, Littlehampton, Brighton, as well as local areas.

7.34 The main shopping areas of the town centre are predominately pedestrianised which create ease of movement for shoppers. However, as discussed above, the area around the railway station is poor, with no clear pedestrian links to, or views of, the town centre. The roads are often dominated by vehicles and congestion, and the level crossing (which separates the railway station and the town centre) creates a barrier to entry, although there is a pedestrian bridge over this which does ease movement.

Chichester Vision

7.35 The strategic approach to development in Chichester is underpinned by the Chichester Vision: "Chichester Tomorrow". This is an aspirational document which aims to establish a framework in which the essence of Chichester's past can be protected, while enhancing the future vitality of the city as the cultural capital of West Sussex, as a place of learning and as an entrepreneurial retail and business centre.

7.36 The Vision includes three key themes to guide thinking and future decision-making:

- 1 **Living** - creating an attractive and accessible city
- 2 **Working** – creating a vibrant and growing economy
- 3 **Visiting** – creating a leading visitor destination

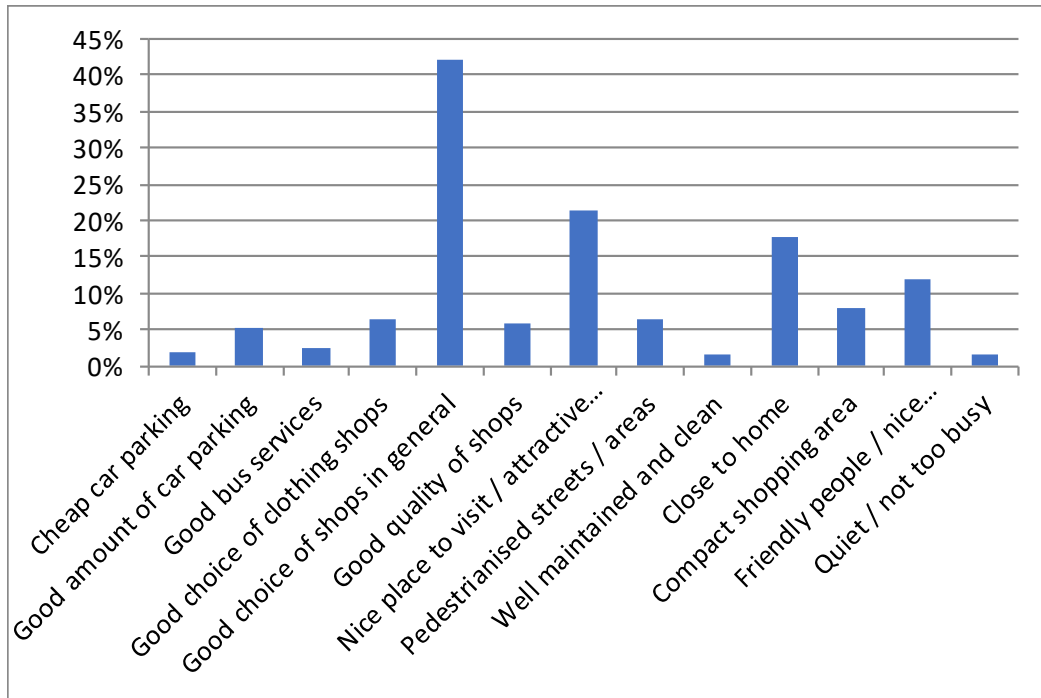
Views of Customers

7.37 Respondents to the household survey were asked whether they had visited Chichester in the last 12 months. Those who said they had were asked what they liked and disliked about shopping in Chichester. The key responses are shown in the graphs below.

7.38 In terms of what respondents liked, 42% of respondents liked that there is a good choice of shops in general, 21% liked that it is a nice place to visit/has an attractive environment, 18% liked that it is close to home and 12% liked that there are nice people/it has a friendly atmosphere.

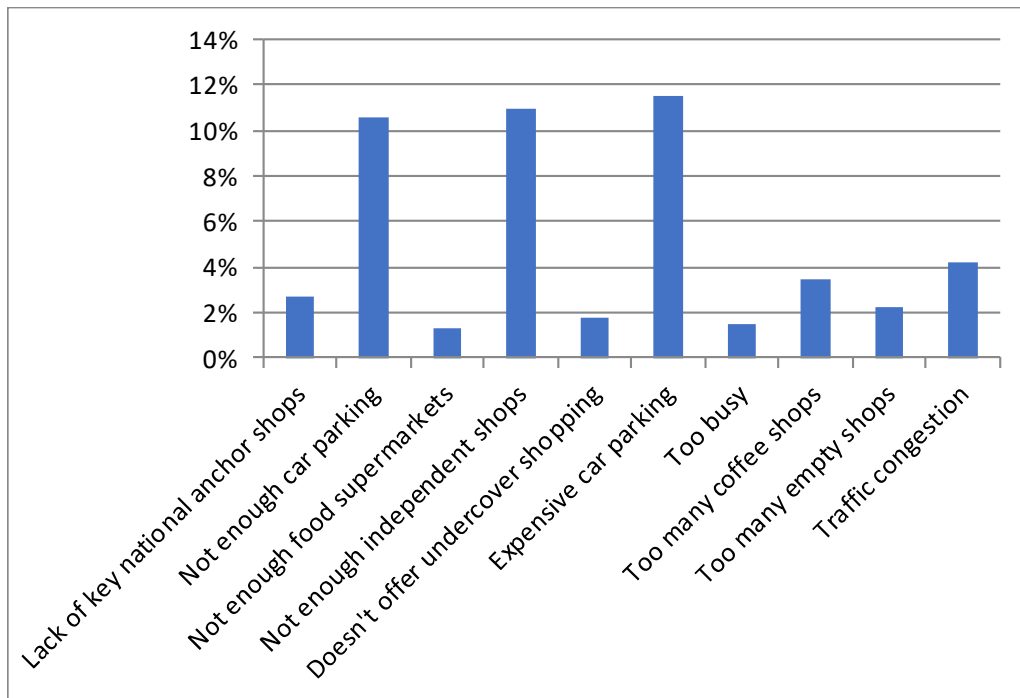
7.39 In terms of what respondents disliked, 11% disliked that there are not enough independent shops, 11% disliked that there is not enough car parking and 11% also disliked that the car parking is too expensive.

Figure 7.1 What does your household like about shopping in Chichester?



Source: NEMS Household Survey, February 2018

Figure 7.2 What does your household dislike about shopping in Chichester?



Source: NEMS Household Survey, February 2018

Chichester's Catchment Area

- 7.40 The household survey results indicate that Chichester's market share of comparison goods expenditure within the study area is 35.8%, including out of centre retail stores. The town centre's market share is 28.1%. The other main attractors were Havant/Waterlooville, Portsmouth, Littlehampton and Bognor Regis, all outside of Chichester District.
- 7.41 Chichester is a popular destination for comparison shopping for residents of Zone 1 (Chichester/Tangmere), Zone 3 (Selsey/East Wittering/Bracklesham), Zone 2 (Hayling Island/South Downs (South)/Southbourne) and Zone 4 (Bognor Regis).
- 7.42 Chichester is less popular for residents in Zone 5 (South Downs North), Zone 6 (Arundel/Littlehampton) and Zone 7 (Waterlooville/Havant), due to the distances to Chichester from these zones and the proximity of other centres such as Havant/Waterlooville, Portsmouth and Littlehampton.

Operator Requirements

- 7.43 The Requirements List is a published source of information providing known requirements for retail and leisure operators' space in towns across the country. For Chichester, there are 32 known retail and leisure operators' requirements. Such operators seeking space in Chichester include The Fragrance Shop, Anytime Fitness (24-hour health and fitness club), Three Joes (Pizza Restaurant), HEMA (a home, living, stationery and bedroom retailer) and Brunning and Price (a national group of pub restaurants).

SWOT Analysis

Strengths

- There is currently a very good range of national multiple retailers in the city centre, despite some recent closures.
- There is a good range of service facilities, including banks, building societies, estate agents and travel agents.
- The main shopping areas are predominately pedestrianised and safe.
- Rental values in the centre are relatively high, which with the low vacancy rate suggests demand for space is strong.
- The centre has several car parks distributed around the centre, close to the main shopping areas.
- The centre provides an attractive historic environment, which is a pleasant place to visit.
- The Cathedral, Pallant House Gallery, theatre and museum act as important tourist destinations.

Weaknesses

- The choice of food and grocery shopping is below the national average.
- The unit sizes are primarily narrow and limited in size due to the historic nature of the centre. This limits the possibility for larger format stores.
- The evening economy has improved through with chain restaurants, but there is further scope to improve the provision of bars/clubs.
- The sense of arrival at the railway station is poor. This area is relatively rundown and acts as a poor gateway to the town centre.

- The amenities/public realm lack consistency and are not high quality (in terms of material and design).

Opportunities

- There is potential to accommodate development on large surface cars, via a more efficient use of car parks or the provision of replacement multi-level car parking.
- There are several other potential development opportunities in the centre, particularly around the Southern Gateway area.
- As a university town and popular tourist destination, there is an opportunity to improve and strengthen the evening/night time economy.
- Future population and expenditure growth provides an opportunity to strengthen the retail offer further to enhance the role of Chichester in the sub-region.

Threats

- Significant future expansion of out of centre comparison goods shopping i.e. at Portfield Retail Park and the new Barnfield Retail Park, could attract trade and/or occupiers away from the city centre if uncontrolled. At present these locations have attracted predominantly bulky goods retailers. If there is pressure in the future, in line with national trends, to attract non-bulky retailers then this could result in relocations from the city centre, because these retail park locations can provide larger units, free car parking and lower cost accommodation.
- Continuing national market difficulties and increase on-line shopping could reduce operator demand for space in the city centre.
- Inability to attract modern retailers due to the lack of large format stores and lack of opportunities.
- Competition from other settlements such as Portsmouth and Winchester.

8.0 Other Centres in the District

Selsey

- 8.1 Selsey is located on the coast, to the south of Chichester city centre, on the Manhood Peninsula. The Local Plan confirms it is a popular holiday destination with one of the largest caravan parks in Europe. During the holiday season, the population of the town is more than doubled. It is also a focus for commercial activities such as horticulture, fishing and other marine related businesses. Selsey High Street is a small, local centre with a limited retail offer, primarily serving local convenience needs. The mix of uses in Selsey is outlined in Table 8.1 below.

Mix of Uses and Retailer Occupation

Table 8.1 Selsey - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Class A1 - Comparison	20	24.1	33.4
Class A1 – Convenience	12	14.5	10.4
Class A1 - Service	12	14.5	13.0
Class A2 – Financial and Prof. Services	12	14.5	11.8
Class A3 – Restaurants/Cafés	9	10.8	9.5
Class A4 – Pubs/Bars	4	4.8	4.6
Class A5 – Takeaway	4	4.8	6.0
Vacant (Class A1-A5)	10	12.0	11.2
Total	83	100.0	100.0

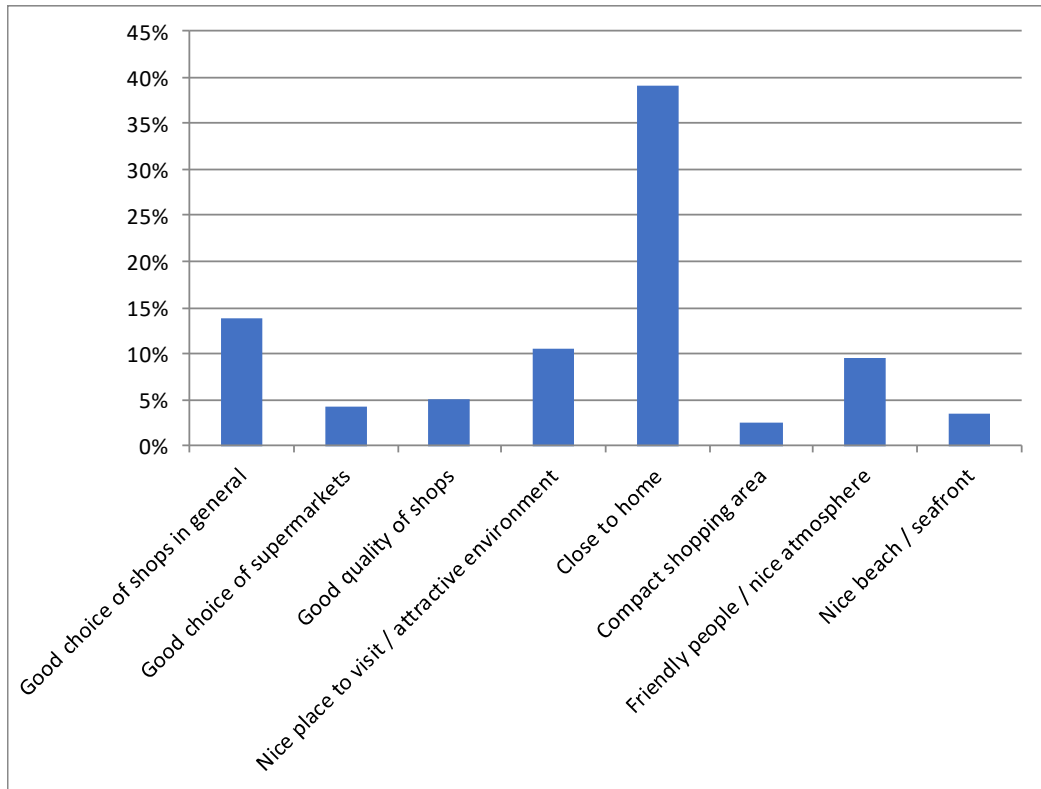
Source: Lichfields' site visit February 2018 and Experian Goad 2017 national average

- 8.2 The centre has a significantly below average provision of comparison units. The comparison offer is made up of independent and specialist stores, with Boots as the only national multiple excluding charity shops. The centre is reasonably well served by convenience shops.
- 8.3 There is a relatively new Asda food store on the edge of the settlement (1,350 sq.m). Class A1 and A2 service uses are also above the national average and include hairdressers, estate agents and banks. Food and drink uses are limited to a few independent cafés, restaurants and pubs/bars. The vacancy rate (12%) is slightly above the national average, and is higher than the other centres in the District.

Views of Customers

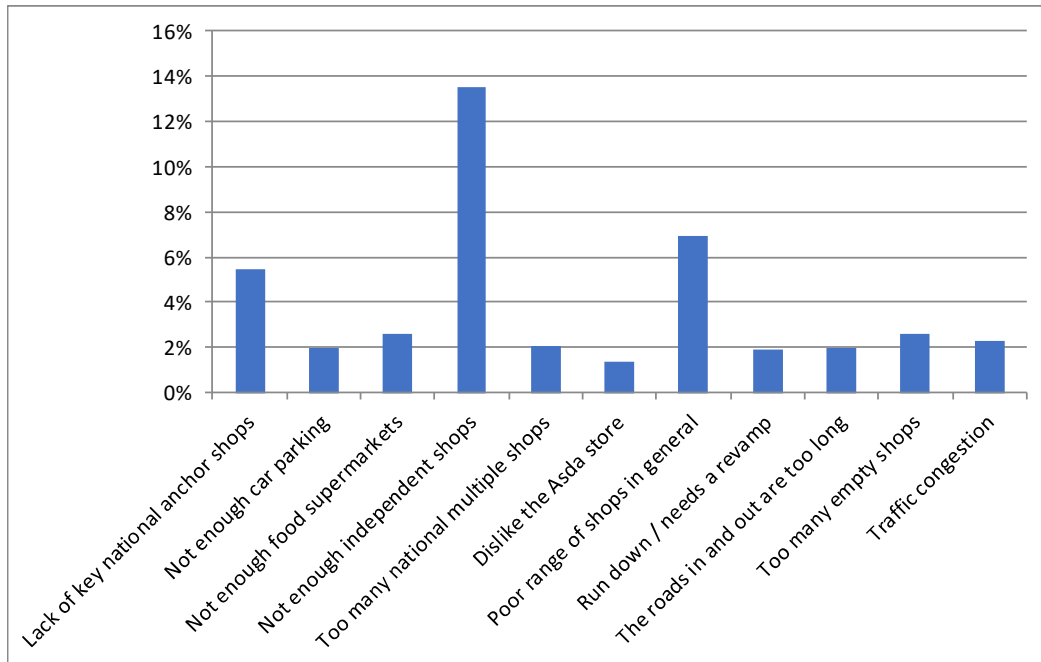
- 8.4 Respondents to the household survey were asked whether they had visited Selsey in the last 12 months. Those who said they had were asked what they liked and disliked about shopping in Selsey. The key responses are shown in the graphs below.
- 8.5 In terms of what respondents liked, 39% of respondents liked that it is close to home and 14% thought it has a good choice of shops. The next highest responses relate to Selsey being a “nice place to visit” and the attractive environment (11%), followed by friendly people/nice atmosphere (10%).
- 8.6 In terms of what respondents disliked, 14% consider there are not enough independent shops, 7% consider there is a poor range of shops in general and 6% consider there are not enough anchor shops (i.e. national multiples).

Figure 8.1 What does your household like about shopping in Selsey?



Source: NEMS Household Survey, February 2018

Figure 8.2 What does your household dislike about shopping in Selsey?



Source: NEMS Household Survey, February 2018

East Wittering

- 8.7 East Wittering lies on the coast, to the south west of Chichester. The Local Plan indicates that the nearby beaches, especially those of West Wittering, are amongst the best in the south east, making them a popular attraction for residents and holiday makers.
- 8.8 East Wittering High Street is a small, local centre with a limited retail offer, serving local residents and tourists. The mix of uses in East Wittering is outlined in Table 8.2 below.

Mix of Uses and Retailer Occupation

Table 8.2 East Wittering - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Class A1 - Comparison	24	34.8	33.4
Class A1 – Convenience	10	14.5	10.4
Class A1 - Service	9	13.0	13.0
Class A2 – Financial and Prof. Services	9	13.0	11.8
Class A3 – Restaurants/Cafés	8	11.6	9.5
Class A4 – Pubs/Bars	1	1.4	4.6
Class A5 – Takeaway	4	5.8	6.0
Vacant (Class A1-A5)	4	5.8	11.2
Total	69	100	100

Source: Lichfields' site visit February 2018 and Experian Goad 2017 national average

- 8.9 The above demonstrates that the centre has a comparison offer slightly above the national average. The comparison offer is made up of independent and specialist stores, including a few antique/hardware, gifts and clothes shops. The centre is well served by convenience units, at around 4% above the national average. This is made up of a few greengrocers, a butcher, Tesco Express and a Coop. Class A1 and A2 service uses are around or above the national average, comprising several estate agents, a bank and a betting office. Food and drink uses are limited to a few independent cafes, restaurants and a bar. The vacancy rate, at 5.8% is below the national average, suggesting the centre is healthy.

Bracklesham

- 8.10 Bracklesham also lies on the coast, to the south west of Chichester and is a popular location for residents and holiday makers. Bracklesham High Street is small and has a very limited number of commercial units. The mix of uses in Bracklesham is outlined in Table 8.3 below.
- 8.11 With only two comparison units, Bracklesham has a significantly below average provision when compared with the national average. It also has a below average provision of convenience units, with only a newsagent. Given the proximity to East Wittering, this is considered consistent with its role as a small local parade, predominately serving local residents and tourists. Class A1 and A2 service provision is also below the national average and there are no pubs/bars. The provision of restaurants/cafés and takeaways is above the national average, reflecting its role as a primarily tourist destination, next to the seafront. There was only one vacant unit.

Mix of Uses and Retailer Occupation

Table 8.3 Bracklesham - Mix of Uses

Type of Unit	Number of Units	Percentage of Units (%)	National Average (%)
Class A1 - Comparison	2	12.5	33.4
Class A1 – Convenience	1	6.3	10.4
Class A1 - Service	2	12.5	13.0
Class A2 – Financial and Prof. Services	1	6.3	11.8
Class A3 – Restaurants/Cafés	4	25	9.5
Class A4 – Pubs/Bars	0	0.0	4.6
Class A5 – Takeaway	5	31.3	6.0
Vacant (Class A1-A5)	1	6.3	11.2
Total	16	100	100

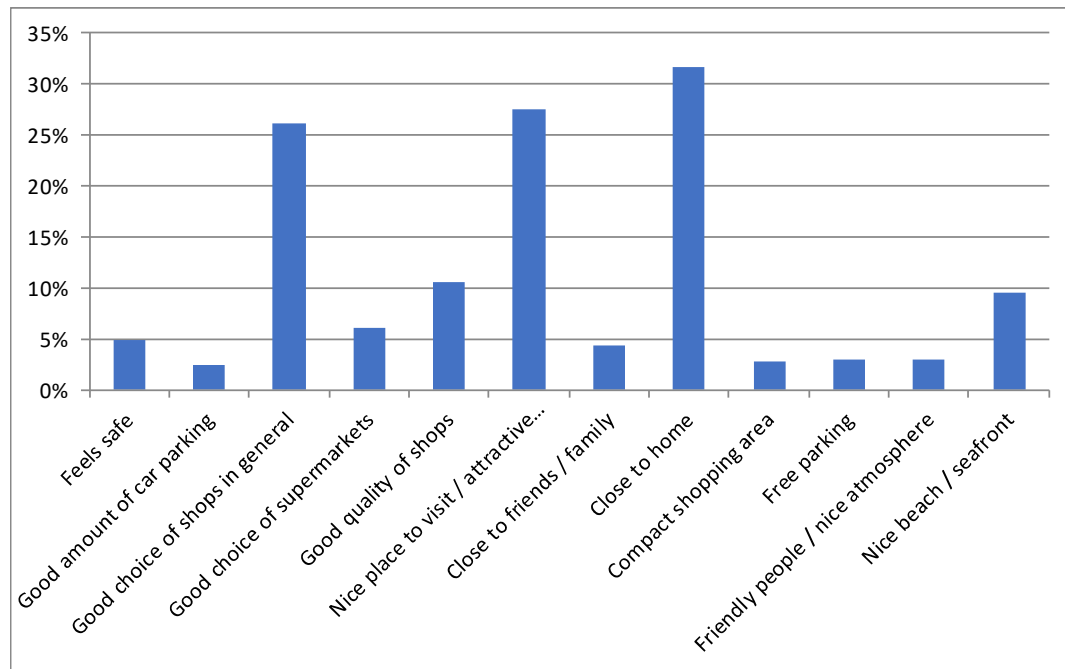
Source: Lichfields’ site visit February 2018 and Experian Goad 2017 national average

Views of Customers

8.12 Household survey respondents were asked whether they had visited East Wittering/Bracklesham in the last 12 months. Those who had were asked what they liked and disliked about shopping in East Wittering/Bracklesham. The responses are shown in the graphs below.

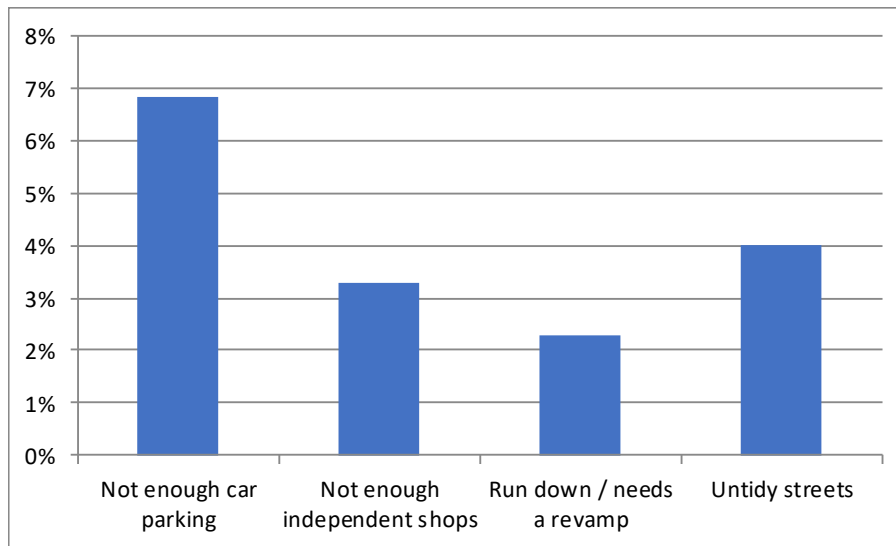
8.13 In terms of what respondents liked, 32% of respondents liked that it is close to home, 27% thought it is a nice place to visit/has an attractive environment and 26% like that there is a good choice of shops in general. 10% of respondents like the quality of the shops. In terms of what respondents disliked, 9% disliked that there is not enough car parking, 4% disliked the untidy streets, 3% consider there is not enough independent shops and 2% consider the centre is run down/needs a revamp.

Figure 8.1 What does your household like about shopping in East Wittering / Bracklesham?



Source: NEMS Household Survey, February 2018

Figure 8.2 What does your household dislike about shopping in East Wittering / Bracklesham?



Source: NEMS Household Survey, February 2018

Southbourne

- 8.14 Southbourne lies to the west of Chichester and has a local role. It has a railway station and a few dispersed community facilities within the settlement. There is no focus or central high street. The provision of facilities comprises: a car showroom, restaurant, farm shop, pub, boots pharmacy, doctor's surgery, funeral directors, social club, library, village hall, college, leisure centre, family centre, church, hairdressers, takeaway, domestic appliances shop, petrol filling station, greengrocers, Tesco Express and a Coop. This provision is typical for a settlement of this size.

Tangmere Audit

- 8.15 Tangmere lies to the east of Chichester city centre and has a local role. It has a few dispersed community facilities. The provision comprises a petrol filling station, a Coop convenience store, village hall/centre, dental centre, medical centre, One Stop with post office, a playground and playing fields, nursery school and a salvage yard.
- 8.16 Tangmere is a strategic development location and its role should develop over the next few years with the ambition to provide a small parade of shops.

9.0 **Planning Policy Analysis**

Introduction

- 9.1 This section reviews the current policy approach to retail and town centres as set out in the Chichester Local Plan: Key Policies 2014-2029 ('Local Plan') in the light of findings within previous sections of this study.
- 9.2 The PPG indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan a lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres.
- 9.3 The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites.
- 9.4 Consistent with the sequential approach, town centres are expected to be the focus for retail and leisure development. The NPPF does not require development to be of an appropriate scale and nature in relation to the centre in which it is located, but larger town centres have the best prospects for attracting investment from developers and multiple operators.
- 9.5 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.
- 9.6 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - the likely effects of development on any town centre strategy; and
 - the impact on any other planned investment.
- 9.7 This section examines the existing policy approach within Chichester District, including the hierarchy of centres, retail frontages/boundaries and retail impact thresholds.

The Hierarchy of Centres

- 9.8 The NPPF (paragraph 23) indicates that planning policies should define a network and hierarchy of centres that is resilient to anticipated economic changes. The PPG indicates that

planning policies should identify the appropriate and realistic role, function and hierarchy of centres over the plan period. The PPG also indicates that strategies should identify changes in the hierarchy, including where a centre is in decline.

- 9.9 **Local Plan Policy 2** (Development Strategy and Settlement Hierarchy) identifies the locations where sustainable development, infrastructure and facilities will be accommodated, which in terms of scale, function and character, support the role of the settlements outlined in Table 9.1 below.

Table 9.1 Chichester District Settlement Hierarchy

Settlement Hierarchy	Settlement
Sub-Regional Centre	Chichester City
Settlement Hub	East Wittering/Bracklesham, Selsey, Southbourne, Tangmere
Service Villages	Birdham, Bosham/Broadbridge, Boxgrove, Camelsdale/Hammer, Fishbourne, Hambrook/Nutbourne, Hermitage, Hunston, Kirdford, Loxwood, North Mundham/Runcton, Plaistow/Ifold, Stockbridge, West Wittering, Westbourne, Westhampnett, Wisborough Green.

Source: Chichester Local Plan: Key Policies 2014-2029 - Policy 2

- 9.10 In accordance with the NPPF, the Local Plan review should define a hierarchy of centres and ensure new main town uses are focused within these centres. Development of main town centre uses in the defined centres should be of a scale that is commensurate with the settlement role and function and does not unbalance the town centre hierarchy. The policy should also make it clear that an objective of the Local Plan is to maintain the vitality and viability of the centres identified within the retail hierarchy. Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, an appropriate retail hierarchy is set out at Table 9.2 below.

Table 9.2 Chichester District Retail Hierarchy

Centre Hierarchy	Centre
Town Centre	Chichester
Local Centre	Selsey, East Wittering
Local /Village Parade	Bracklesham, Southbourne, Tangmere, Bosham, Westbourne

Source: Lichfields' Analysis

- 9.11 Chichester (433 units) is the main shopping destination in the District and is a sub-regional centre. Selsey (83 units) and East Wittering (69 units combined) serve more localised catchments, providing a more limited range of retail uses and services. These centres also serve important tourist roles, given their proximity to the coast.
- 9.12 Bracklesham, Southbourne and Tangmere provide predominately service and community uses, serving their immediate local catchment area. Significant new housing development is planned for Southbourne and Tangmere, which will need to be supported by additional shops and services. In addition, Bosham and Westbourne have some retail uses and services, consistent with the role of a local centre, serving the immediate local catchment area.
- 9.13 Portfield Retail Park and the new Barnfield Retail Park are the other main concentrations of retail floorspace within the District. These are retail warehouse parks rather than traditional centres. They are predominantly car borne shopping destinations that do not provide the broader mix of retail, non-retail services and community uses that tend to be found in designated centres, particularly town and district centres.
- 9.14 It is not recommended that Portfield Retail Park or Barnfield Retail Park are designated as centres, because this would remove the need for new development within these retail parks too

pass the sequential or impact tests (See recommendations on Policy 28 below). Removal of these tests could encourage significant expansion of these retail parks and/or the relaxation of restrictions on the good that can be sold. This type of development, if uncontrolled, could result in significant trade diversion from the city centre and/or the relocation of occupiers or diversion of investment away from the city centre, which could have an adverse impact on the health and vitality and viability of the city centre.

- 9.15 At present these retail park locations have attracted predominantly bulky goods retailers. If there is pressure in the future, in line with national trends, to attract non-bulky retailers then this could result in relocations from the city centre, because these retail park locations can provide larger units, free car parking and lower cost accommodation. Maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.
- 9.16 All development proposals within out of centre locations should continue to comply with the sequential and impact tests, to protect the vitality and viability of the network of centres within the District. The health of the city centre and other centres will need to be monitored.

Impact Thresholds

- 9.17 The PPG states that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, for example if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre. As indicated above, maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.
- 9.18 **Local Plan Policy 28** (Edge and Out of Centre Sites – Chichester) sets out the Council’s approach to development in edge and out of centre locations. With regards to impact specifically, the policy sets out that proposals over 2,500 sq.m will be required to be accompanied by a full assessment of the potential impact on town centres and nearby centres. The current threshold is in line with the NPPF threshold.
- 9.19 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate as a blanket threshold across Chichester District, because this scale of development would represent a significant proportion of the overall retail projections for parts of the District. Retail development smaller than 2,500 sq.m gross could have a significant adverse impact, particularly on smaller centres. A reduced threshold is therefore recommended outside of Chichester.
- 9.20 In terms of scale, retail and leisure development of 2,500 sq.m or more within proximity to Selsey, East Wittering, Bracklesham and the other lower level centres would be significant in relation to the scale of existing retail and leisure floorspace.
- 9.21 The household survey results suggest trading levels within Selsey, East Wittering, Bracklesham and other smaller centres are not as strong when compared with Chichester, and these centres may be vulnerable to impacts from smaller scale development. The share of retail floorspace capacity that can be attributed to other smaller centres is limited, even over the long-term period (up to 2036). The following impact thresholds outlined in Table 9.3 should be considered.

Table 9.3 Impact Thresholds

Centre Hierarchy	Centre	Impact Threshold
Town Centre	Chichester	Over 2,500 sq.m gross
Local Centre	Selsey, East Wittering	Over 500 sq.m gross
Local/Village Parades	Bracklesham, Southbourne, Tangmere, Bosham, Westbourne	Over 250 sq.m gross

Source: Lichfields' Analysis

Town Centre Boundary and Primary Shopping Area

- 9.22 The designation of primary shopping areas and town centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area, which will comprise the primary retail frontages and the secondary retail frontages. The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the town centre.
- 9.23 Planning policy does not currently define a primary shopping area or town centre boundary for Chichester city centre (or any other centre). A primary shopping area and town centre boundary should be defined for Chichester, as the main shopping destination in the District.
- 9.24 Policy regarding edge and out of centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to make reference to the primary shopping area and town centre boundary, clearly indicating where retail and other main town centre uses should be concentrated (i.e. the sequential approach indicates that retail uses should be focused within the primary shopping area and other town centre uses should be focused within the wider town centre boundary, unless it can be demonstrated that there are no suitable and available sites).
- Policy wording should also be aware of the emerging revised NPPF. As outlined in Section 2 of this study, the most pertinent suggested change in the draft NPPF (underlined) is at paragraph 87 - *“main town centre uses should be located in town centres, then edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered”*.
- 9.25 For planning policy purposes, the Chichester city centre boundary could be defined by the town ring road, but could also incorporate:
- the Chichester Festival Theatre and Minerva Theatre to the north of the town centre;
 - the Westgate leisure centre to the south west of the town centre;
 - the railway station;
 - Waitrose food store to the south of the town centre; and
 - the areas of secondary retail frontages to the east of the town centre outside the ring road (i.e. The Hornet).
- 9.26 In terms of the primary shopping area boundary, this should include all the existing defined primary and secondary retail frontages.
- 9.27 The Selsey Neighbourhood Plan and the Submission Site Allocations DPD define centre boundaries for Selsey and East Wittering. These boundaries are tightly drawn around existing retail and town centre uses. This approach is appropriate for centres of this size.

The Appropriate Mix of Uses

- 9.28 Town centres should provide a range of complementary uses. A balance between retail, entertainment and leisure activity helps town centres compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings. The retail capacity projections indicate there is a need for a range of new Class A1 to A5 floorspace over the plan period, and a flexible approach capable of accommodate Class D2 leisure and cultural uses is also recommended.
- 9.29 There are four broad policy approaches that could be adopted in Chichester District, as follows:
- 1 strengthening shop frontages policies within the Local Plan to provide more control over the loss of retail uses. This could involve extending the areas of protected frontage and/or reducing the maximum threshold for non-retail uses;
 - 2 retaining the current Local Plan policies that seek to control the number of non-retail uses within designated frontages;
 - 3 relaxing the current shop frontages policies to allow a more flexible approach to enable more non-retail uses, particularly if the maximum threshold for non-retail uses has been breached. This could involve reducing the areas of protected frontage or increasing the maximum threshold for non-retail uses; or
 - 4 a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.
- 9.30 The advantages and disadvantages of these approaches are outlined below.
- 9.31 The NPPF indicates that policies which control the mix of uses can be adopted to maintain the vitality and viability of town centres. The NPPF indicates that development plans may continue to distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development. Local planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. In addition to indicating what uses will be permitted in these defined areas, local planning authorities should:
- "promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites."*
- 9.32 A balanced mix of uses is required in town centres, notwithstanding specific local circumstances. There is a reasonable degree of flexibility for local authorities to consider local circumstances during the plan making process, and in this respect the NPPF is not prescriptive.
- 9.33 **Local Plan Policy 27** (Chichester Centre Retail) outlines the approach to main town centre uses in Chichester city centre's primary and secondary shopping frontages, in particular the approach to the control of non-A1 uses. Within the primary shopping frontages in Chichester, additional non-shopping (A1) uses will be granted at ground floor level where all the following criteria are met:
- 1 additional uses (Class A2 - A5) results in no more than 25% of the sum total of the street frontages in non-shopping (A1) uses;

- 2 additional use results in no more than two non-shopping (A1) uses adjacent to each other or a total of 15 metre continuous non-retail frontage (whichever is the greater);
 - 3 proposal does not prejudice the effective use of the upper floors; and
 - 4 shop window and entrance is provided or retained which relates well to the design of the building and to the street-scene and its setting.
- 9.34 Proposals for town centres uses at ground level within use classes A, B1 (a), C1, D1 and D2 of the Use Class Order will be granted within the secondary shopping frontages where all the following criteria are met:
- 1 no more than 75% of the whole of the shopping frontage is in non-shopping (A1) use;
 - 2 the proposal does not result in the loss of existing residential accommodation;
 - 3 the proposal does not prejudice the effective use of the upper floors; and
 - 4 a shop window and entrance is provided or retained which relates well to the design of the building and to the street-scene and its setting.
- 9.35 According to a land use survey undertaken by the Council (January 2018), non-Class A1 uses in the primary shopping frontage is around 25% of total street frontages, which is in line with the Council's maximum 25% threshold. This suggests there is limit future flexibility for non-retail uses within the primary frontages. In terms of the secondary shopping frontages, 53.7% of the total street frontages are in non-Class A1 use, which is well below the policy threshold. This suggests there is significant future flexibility for non-retail uses within the secondary frontages.
- 9.36 The suitability of this threshold approach needs to be considered in the context of recent changes in the mix of uses within frontages, the floorspace projections and recent changes to the General Permitted Development Order (GPDO). The changes to the GPDO will have an impact on frontage policies. These measures allow for greater flexibility for changes of use from retail to non-retail uses subject to Prior Approval e.g. Class A uses to C3 residential use and Class A1 to non-A1 uses. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce where shop units are predominantly small (less than 150 sq.m gross).
- 9.37 The health check assessment of Chichester and the audits of the other centres in this study suggest (to date) the impact of the GPDO changes have not been significant. In the future permitted changes of use for smaller units will have an impact on the enforcement of Local Plan policies, i.e. where units are less than 150 sq.m. The ability to control non-A1 uses within the primary shopping frontages and the direction of Class A4 and A5 uses to the secondary shopping frontages has diminished.
- 9.38 Although the threshold in the primary retail frontage has been breached, a ban on changes of use from Class A1 or other Class A would not promote diversity and could stifle investment, which could be potentially damaging to the vitality and viability of the centre. However, the introduction of Article 4 directions to restrict permitted GPDO changes of uses within the primary retail frontage could be considered, in areas where there are high proportions of smaller units (under 150 sq.m).
- 9.39 In terms of the additional policy requirement in the primary retail frontage, there is no evidence to suggest a less restrictive approach is necessary, particularly in view of the future retail floorspace growth projections outlined in this report, low shop vacancy rates and the high degree of flexibility provided within the secondary frontages. A balanced approach should continue to be applied and the mix of uses in Chichester city centre, and this should be monitored and protected as necessary.

- 9.40 In the secondary retail frontages, the current approach is considered robust. The introduction of more restrictive shop frontage policies would be inappropriate because the threshold has been breached in the primary frontages. This approach could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centre, and recent changes to the GPDO already provide a significant level of flexibility for smaller units.
- 9.41 In terms of the extent of the primary and secondary retail frontages, several potential amendments/additions have been identified as shown below.
- 1 The area in The Square, off St Pancras could be included as secondary retail frontage (i.e. to include the café/restaurants and art gallery).
 - 2 1-4 Eastgate Square, which is currently defined as primary retail frontage, could be re-defined as secondary retail frontage, because it predominantly comprises service uses. This would create a continuous secondary retail frontage up to East Walls.
 - 3 Along Little London, there are two dwellings which are included at the end of the secondary retail frontage. These could be removed.
 - 4 The secondary retail frontage could be extended to include the retail units on the corner of North Street and Oaklands Way, and those in the small shopping precinct.
 - 5 The secondary retail frontage could be extended to include the commercial units on the corner of North Street and Northgate (i.e. 3-5 North Street).
 - 6 The units along Cooper Street could be included as secondary retail frontage.
 - 7 The secondary retail frontage could be extended along Market Road to include the currency exchange and Coral betting office unit.
- 9.42 In addition, given there are already a number of Class A3 and A4 uses along South Street (including a number of recently opened chain restaurants), the Council could consider contracting the primary retail frontage in this area to allow more flexibility for non-Class A1 uses and seek to create a 'hub' area for food and beverage uses in this area, e.g. 24-41 South Street and 43a to 50 South Street could be removed from the primary retail frontage and re-designated as secondary retail frontage. The remaining primary retail frontage could then be more easily/tightly controlled in terms of maintaining a high level of Class A1 uses.
- 9.43 **Local Plan Policy 29** (Settlement Hubs and Village Centres) relates to settlement hubs and village centres (East Wittering and Selsey). It states proposals for development will be encouraged where they would contribute to the vitality and viability of the retail centres of East Wittering and Selsey and are of an appropriate scale and conform to the shopping function of the centre. Where sites cannot be found within the centres of these settlements, consideration will be given to proposals on edge of centre sites. It does not set out a threshold approach (as there are no defined retail frontages outside of Chichester city centre).
- 9.44 In the established shopping centres and other existing local centres, parades and isolated shops, Local Plan Policy 29 confirms retail uses will be protected. Planning permission for other uses will be granted where it has been demonstrated that all the following criteria have been met:
- 1 the proposal does not result in the reduction of shopping facilities; or
 - 2 there is no demand for continued retail use and the site has been marketed effectively for such use or no local need has been identified.
- 9.45 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres. The current approach currently encourages all forms of development that contributes to the vitality and viability of the retail centres. This approach appears to be robust and appropriate. A

laissez faire approach could result in the deterioration of shopping frontages and could undermine the role of these smaller shopping centres.

Edge and Out of Centre Sites

- 9.46 **Local Plan Policy 28** (Edge and Out of Centre Sites – Chichester) sets out the Council’s approach to development in edge and out of centre locations. Proposals outside the central retail area for non-food retail and food retail, including extensions, will be granted if it can be demonstrated the development does not have a significant adverse impact on the vitality and viability of the central shopping area. The policy also sets out a sequential approach to site selection. This approach is consistent with the NPPF and should continue to be adopted in future development plans.
- 9.47 As indicated above, lower local impact thresholds should be considered for areas outside Chichester city. The impact test should continue to apply for development over 2,500 sq.m gross or above in Chichester City in line with the NPPF.
- 9.48 The Policy also sets out that edge of centre/out of centre units (including any created by the subdivision of existing units) should be of a minimum size of 1,000 sq.m gross. This approach is not consistent with the NPPF. The application of the sequential approach and the impact test (based on appropriate impact thresholds) should provide adequate control of edge and out of centre development. Smaller units of under 1,000 sq.m are less likely to pass the sequential test.

10.0 **Accommodating Growth**

Introduction

10.1 This section highlights the implications of the findings of the previous sections for each centre in Chichester District. It explores how the potential distribution of future development could be accommodated, recognising the NPPF requires local authorities to allocate sites to meet identified needs over the plan period.

Floorspace Projections

10.2 The floorspace projections set out in the previous sections of this study assume that new shopping and leisure facilities will help Chichester District maintain its current market share of expenditure within the study area, recognising that other competing centres will also improve in the future. There are several issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- 1 major retail developments in competing centres;
- 2 the re-occupation of vacant retail floorspace;
- 3 the availability of land to accommodate new development;
- 4 the reliability of long term expenditure projections;
- 5 the effect of internet/home shopping on the demand for retail property;
- 6 the level of operator demand for floorspace in Chichester District;
- 7 the likelihood that Chichester District's existing market share of expenditure will change in the future in the face of increasing competition; and
- 8 the potential impact new development may have on existing centres.

10.3 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer-term plan period should also be considered. Projections up to 2031 are realistic and are based on up-to-date (post EU referendum) forecasts. The longer term floorspace projections (up to 2036) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

10.4 The expenditure projections in this study exclude growth in expenditure attributed to home shopping made through non-retail businesses. The study assumes that home shopping will continue to increase in the future, including the growth of internet shopping.

10.5 Allowing for the impact of growth in home shopping, the quantitative and qualitative assessment of the potential for new retail and leisure floorspace within the previous sections suggests there is scope for new development within Chichester District. The global projections for the District up to 2026 suggest there is scope for about 14,500 sq.m gross of Class A1 to A5 floorspace. The long-term projections up to 2036 suggest there is scope for about 38,300 sq.m gross of Class A1 to A5 floorspace. A breakdown of the floorspace projections for Class A retail (comparison and convenience) and food and beverage for Chichester District up to 2036 are shown in Table 10.1 below.

Table 10.1 Chichester District Floorspace Projections (sq.m Gross)

Type	By 2021	By 2026	By 2031	By 2036
Convenience	536	1,682	2,842	3,981
Comparison	2,483	10,421	19,405	28,698
Food and Beverage	771	2,371	4,042	5,605
Total	3,790	14,474	26,289	38,284

Source: Table 13, Appendix 2; Table 12, Appendix 3; Table 13, Appendix 4

Vacant Units

- 10.6 The existing stock of premises will have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 10.7 There are 47 vacant shop units within Chichester city centre, Selsey, East Wittering and Bracklesham, which equates to an overall vacancy rate of 7.8%, which is lower than the Goad national average of 11.2%. All centres (except Selsey) have vacancy rates lower than the national average. This suggests the centres in the District are performing relatively healthily, in comparison with many other town centres. The healthiest centres generally have a vacancy rate of around 5%, because there will always be an element of vacancies, reflecting the normal churn of occupiers.
- 10.8 Nevertheless, vacant premises should help to accommodate growth, given their town/district centre location and the sequential preference for future investment. If about half the existing vacant floorspace can be reoccupied then there could be potential for re-occupied vacant space to accommodate the following new floorspace:
- Chichester city centre – 2,400 sq.m gross
 - Selsey – 500 sq.m gross
 - East Wittering/Bracklesham – 200 sq.m gross
- 10.9 Reoccupied vacant shop units in total could accommodate up to 3,100 sq.m gross. If this reduction in vacant units can be achieved, then the overall Class A1 to A5 floorspace projection for Chichester up to 2026 would reduce from about 14,500 sq.m gross to 11,400 sq.m gross.
- 10.10 The application of shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist reoccupation.

Development Opportunities

- 10.11 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.
- 10.12 Chichester District has several strategic housing allocations contained in the existing Development Plan which may include local shops and services to cater for the needs of new residents within these schemes (subject to satisfying the sequential and impact tests if required). If brought forwards, these developments will also help to meet the projected retail floorspace identified in this study.
- 10.13 As indicated above, vacant units within Chichester city centre, Selsey and East Wittering/Bracklesham could accommodate up to 3,100 sq.m gross. If this can be achieved, then

the short term floorspace projection up to 2021 can be accommodated, allowing for The Range commitment.

10.14 Considering vacant shop units, further sites to accommodate around 11,400 sq.m gross should be identified up to 2026 and around 23,200 sq.m gross up to 2031.

10.15 A review of potential development opportunities has identified several opportunities within the District. These opportunities have been assessed in Appendix 6. The opportunities and their development potential is summarised below:

Chichester

- CH1: Cattle Market Car Park (edge of centre) – good potential – over 5,000 sq.m gross
- CH2: Market Road Car Park (edge of centre) – reasonable potential – 500 sq.m gross
- CH3: Kwit Fit, St Pancras (town centre) – good potential - 1,000 sq.m gross
- CH4: New Park Road Car Park (edge of centre) – reasonable potential - 500 sq.m gross
- CH5: Northgate Car Park (edge of centre) – good potential – over 5,000 sq.m gross
- CH6: Metro House, Northgate (edge of centre) – reasonable potential – 2,000 sq.m gross
- CH7: Chichester Railway Station (edge of centre) – good potential – 2,500 sq.m gross
- CH8: Former Government Offices, Southgate (edge of centre) – good potential – 1,000 sq.m gross
- CH9: Law Courts and Bus Station (edge of centre) – good potential – 5,000 sq.m gross
- CH10: Basin Road Car Park/Bus Depot (edge of centre) – reasonable potential – 3,000 sq.m gross
- CH11: Little London/St. Martin’s Car Park (in-centre) – reasonable potential – 1,000 sq.m gross
- CH12: Baffins Lane Car Park (in-centre) – reasonable potential – 500 sq.m gross
- CH13: Coach Park (edge of centre) – good potential – 500 sq.m gross
- CH14: Canal Basin/Royal Mail (edge of centre) – reasonable potential – 2,000 sq.m gross

East Wittering/Bracklesham

- EW1: Former Royal Oak pub, East Wittering – good potential – up to 1,500 sq.m gross.

Selsey

- SEL1: BT Premises/ Royal Mail Premises (edge of centre) – reasonable potential – 1,000 sq.m gross
- SEL2: Selsey Cars, (town centre) – good potential – 500 sq.m gross.

Chichester

- 10.16 The floorspace projections for Class A retail/food and beverage uses are shown in Table 10.2 below:

Table 10.2 Chichester Floorspace Projections (sq.m Gross)

Type	2026	2031	2036
Convenience	1,352	2,289	3,208
Comparison	9,925	18,532	27,435
Food and Beverage	1,955	3,335	4,624
Total	13,232	24,156	35,267

Source: Tables 12 and 13, Appendix 2, 3 and 4

- 10.17 In Chichester, together the development sites identified could accommodate over 29,500 sq.m gross of Class A1 to A5 uses. These opportunity sites, together with the occupation vacant units (2,400 sq.m gross), could accommodate all the floorspace capacity up to and beyond 2031, and about 90% of projection up to 2036.

Selsey

- 10.18 The floorspace projections for Class A retail/food and beverage uses are shown in Table 10.3 below:

Table 10.3 Selsey Floorspace Projections (sq.m Gross)

Type	2026	2031	2036
Convenience	168	280	390
Comparison	333	585	848
Food and Beverage	187	316	438
Total	688	1,181	1,676

Source: Tables 12 and 13, Appendix 2, 3 and 4

- 10.19 Vacant shop units (500 sq.m gross) and the two identified potential development sites in Selsey (BT Premises/Royal Mail Premises and Selsey Cars) could accommodate up to 2,000 sq.m gross of Class A1-A5 floorspace, which is sufficient to accommodate the floorspace capacity projection up to 2036.

- 10.20 Should these development opportunities not come forward, projected demand could be met by small in-fill developments and/or shop extensions including the use of upper floors.

East Wittering/Bracklesham

- 10.21 The floorspace projections for Class A retail/food and beverage uses are shown in Table 10.4 below:

Table 10.4 East Wittering/Bracklesham Floorspace Projections (sq.m Gross)

Type	2026	2031	2036
Convenience	80	133	185
Comparison	118	206	298
Food and Beverage	92	155	214
Total	290	494	697

Source: Tables 12 and 13, Appendix 2, 3 and 4

- 10.22 In East Wittering/Bracklesham, the Former Royal Oak Public House potential development site could provide up to 1,500 sq.m gross of Class A1-A5 floorspace, which would be more than

sufficient to accommodate the floorspace capacity up to 2036. However, there is a current application and the proposals for the site only include the retention of the public house (about 400 sq.m). This proposed development and the reoccupation of vacant units (200 sq.m) could accommodate most of the projection up to 2036. Any residual capacity could be met by small in-fill developments, and/or shop extensions including the use of upper floors.

11.0 Conclusions and Recommendations

11.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for the main centres in Chichester District. It explores how the identified growth across the District could be accommodated and the potential distribution of future development.

Chichester District's Need

11.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

11.3 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections between 2031 and 2036.

Convenience Goods Development

11.4 The convenience goods expenditure projections, taking account of the growth of home/internet shopping as currently recommended by Experian, suggest new floorspace could be distributed as shown in Table 11.1.

Table 11.1 Convenience Goods Floorspace Projections (Sq.M Gross)

Centre	By 2021	By 2026	By 2031	By 2036
Chichester	458	1,352	2,289	3,208
Selsey	56	168	280	390
East Wittering/Bracklesham	26	80	133	185
Chichester rural	26	82	140	198

Source: Table 13, Appendix 2

11.5 In qualitative terms, food store retail provision is strong in Chichester. Large food stores (over 1,000 sq. m net) suitable for main and bulk food shopping. The Asda at Selsey is also suitable for main food shopping. The other centres provide small food stores suitable for basket and top up shopping. There are no clear identified areas of qualitative deficiency in food store provision within the District.

Comparison Goods Development

11.6 The comparison goods expenditure projections, again taking account of the expected growth of home/internet shopping as recommended currently by Experian, suggest new floorspace in the District could be distributed as shown in Table 11.2. Residents have a good choice of higher order comparison shops in Chichester city centre and retail warehouse parks, providing a wide range of goods.

Table 11.2 Comparison Goods Floorspace Projections (sq.m Gross)

Centre	By 2021	By 2026	By 2031	By 2036
Chichester	2,321	9,925	18,532	27,435
Selsey	109	333	585	848
East Wittering/Bracklesham	38	118	206	298
Chichester rural	15	46	81	118

Source: Table 12, Appendix 3

- 11.7 Although comparison goods expenditure retention in Chichester is high, investment will be needed in the District to retain the existing levels of comparison goods expenditure. The objective of the development strategy for Chichester District should be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

Food and Beverage Development

- 11.8 The food and beverage projections suggest new floorspace could be distributed as shown in Table 11.3. All centres have a good provision of Class A3 (restaurant/café) uses. Growth in expenditure should provide opportunities to enhance food and beverage provision within all centres.

Table 11.3 Food and Beverage Floorspace Projections (sq.m Gross)

Centre	Additional Floorspace (sq.m Gross)			
	By 2021	By 2026	By 2031	By 2036
Chichester	634	1,955	3,335	4,624
Selsey	62	187	316	438
East Wittering/ Bracklesham	30	92	155	214
Other Chichester District	44	138	236	329

Source: Table 12, Appendix 4

Other Main Town Centre Uses

- 11.9 Residents in Chichester District have good access to a range of commercial leisure and entertainment facilities within the District and in the surrounding area. There are also the nearby town centres of Bognor Regis, Portsmouth, Littlehampton and Waterlooville. There may be potential to improve facilities as follows:

- theoretical capacity for a medium sized cinema (5-6 screens)
- a health and fitness facility (up to 80 fitness stations).
- theoretical capacity for a bingo facility.

- 11.10 Other uses such as hotels, nightclubs, museums, art galleries, exhibition space, live music venues, clubs, hotels casinos, tourist attractions and new emerging leisure activities could be appropriate and the strategy needs to be flexible and can respond to emerging opportunities for new facilities of this kind.

Strategy for Accommodating Growth

- 11.11 The floorspace projections shown in this study provide broad guidance. Meeting the projections to 2026 and 2031 is the priority, and longer-term projections need to be monitored.

- 11.12 The short-term priority should be the reoccupation of vacant floorspace in the centres. Chichester, East Wittering and Selsey have several development opportunities, which offer potential to accommodate some or all the projected growth.
- 11.13 In Chichester, the development sites identified could accommodate upwards of around 25,500 sq.m gross of Class A1 to A5 uses. These development opportunities and vacant units could accommodate the floorspace capacity up and beyond 2031.
- 11.14 In Selsey vacant shop units and the BT Premises/Royal Mail Premises and Selsey Cars sites could accommodate the floorspace capacity up to 2036. In East Wittering, the Former Royal Oak Public House development site and vacant units could accommodate the floorspace capacity up to 2036. Residual capacity could be met by small in-fill developments, and/or shop extensions including the use of upper floors.

Policy Review

The Hierarchy of Centres

- 11.15 In accordance with the NPPF, the Local Plan review should define a hierarchy of centres and ensure new main town uses are focused within these centres. Development of main town centre uses in the defined centres should be of a scale that is commensurate with the settlement role and function and does not unbalance the town centre hierarchy. The policy should also make it clear that an objective of the Local Plan is to maintain the vitality and viability of the centres identified within the retail hierarchy. Based on the scale of facilities available within each settlement and the retail floorspace projections in this study, a retail hierarchy is suggested in Table 11.4.

Table 11.4 Chichester District Retail Hierarchy

Centre Hierarchy	Centre
Town Centre	Chichester
Local Centre	Selsey, East Wittering
Local/Village Parade	Bracklesham, Southbourne, Tangmere, Bosham, Westbourne

Source: Lichfields' Analysis

Impact Thresholds

- 11.16 The Local Plan impact threshold is in line with the NPPF's threshold (2,500 sq.m gross). Development smaller than 2,500 sq.m gross could have a significant adverse impact, particularly on smaller centres. A reduced threshold is therefore recommended, as shown in Table 11.5.

Table 11.5 Chichester District - Impact Thresholds

Centre Hierarchy	Centre	Impact Threshold
Town Centre	Chichester	Over 2,500 sq.m gross
Local Centre	Selsey, East Wittering	Over 500 sq.m gross
Local / Village Parade	Bracklesham, Southbourne, Tangmere, Bosham, Westbourne	Over 250 sq.m gross

Source: Lichfields' Analysis

Town Centre Boundaries and Frontages

- 11.17 A primary shopping area and town centre boundary should be designated in the development plan for Chichester city centre, as the main shopping destination in the District, to apply the

sequential and impact tests. The town centre boundary could be defined by the ring road plus the Chichester Festival Theatre and Minerva Theatre, the Westgate leisure centre, the railway station and Waitrose food store and the areas of secondary retail frontages to the east of the town centre outside the ring road (i.e. The Hornet). The primary shopping area boundary should cover the defined primary and secondary retail frontages.

11.18 There is no evidence to suggest a less restrictive approach is necessary for shopping frontages. A balanced approach should continue to be applied. The introduction of more restrictive shop frontage policies would be inappropriate because the threshold has been breached in the primary frontages.

11.19 A few suggested amendments/additions to the primary and secondary retail frontages should be considered by the Council, as follows.

- 1 The area in The Square, off St Pancras could be included as secondary retail frontage;
- 2 1-4 Eastgate Square primary retail frontage could be re-defined as secondary retail frontage;
- 3 dwellings on Little London could be removed from the secondary retail frontage;
- 4 secondary retail frontage could be extended to include the corner of North Street and Oaklands Way and those in the small shopping precinct;
- 5 secondary retail frontage could be extended to include the corner of North Street and Northgate (i.e. 3-5 North Street);
- 6 units along Copper Street could be included as secondary retail frontage;
- 7 secondary retail frontage could be extended along Market Road to include the currency exchange and Coral betting office unit; and
- 8 the primary retail frontage along South Street could be contracted to allow more flexibility to create a 'hub' area for food and beverage uses.

11.20 In other centres, the current approach is robust and should continue to be adopted.

Future Monitoring

11.21 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the medium to long term up to 2031. Very long-term horizon year projections up to 2036 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. Longer-term projections after 2031 should be treated with caution and provide broad guidance only.

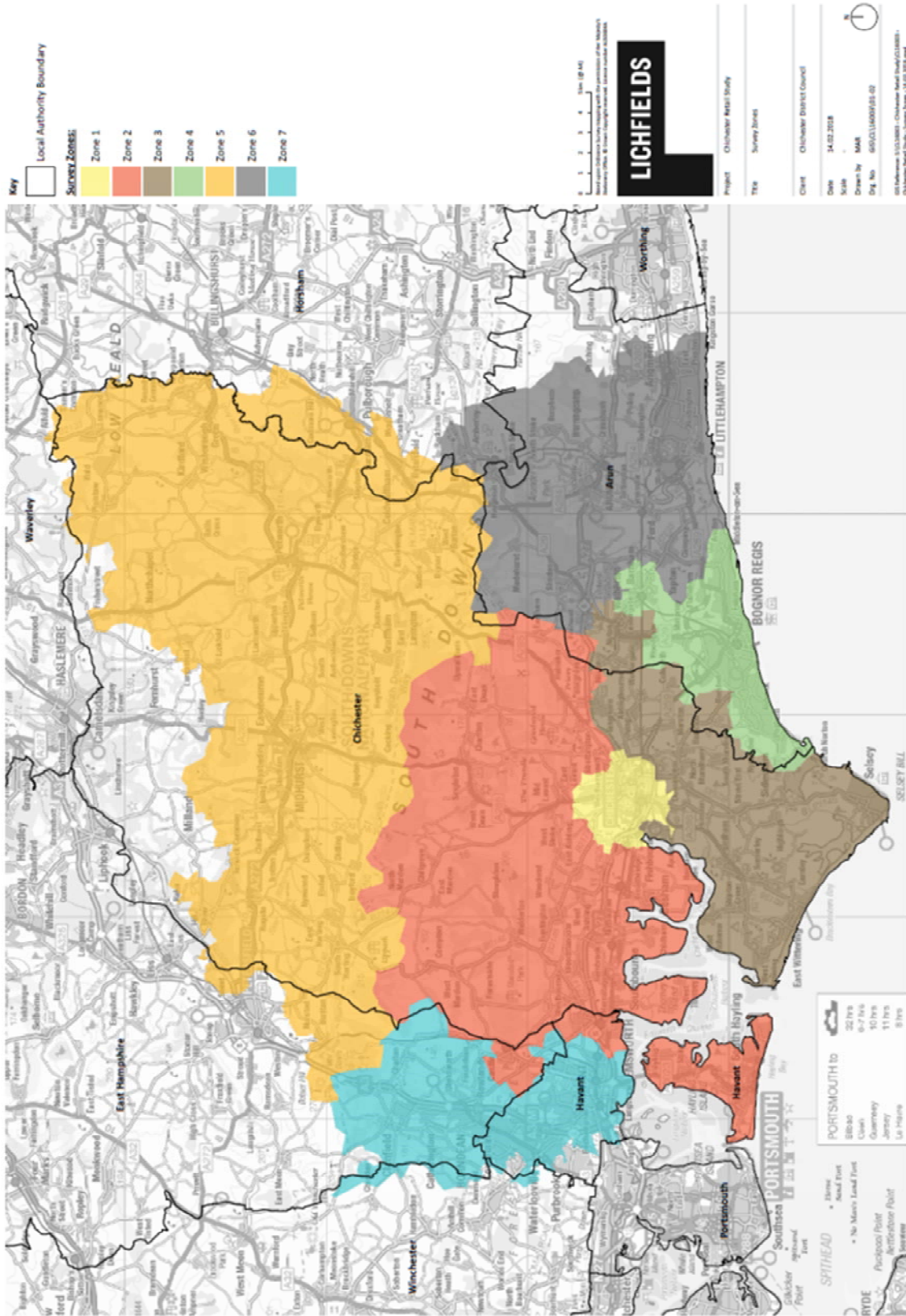
11.22 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- 1 population projections;
- 2 local expenditure estimates (information from Experian or other recognised data providers);
- 3 growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- 4 the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

- 5 existing retail floorspace and average turnover to floorspace densities; and
- 6 implemented development within and around the study area.

11.23 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1: Study Area



Appendix 2: Convenience Goods Capacity

Table 1 - Study Area Population

Zone	2016	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	32,640	33,109	33,800	35,042	36,257	37,307
Zone 2 - Hayling Island/South Downs/Southbourne	54,265	54,978	56,037	57,945	59,817	61,459
Zone 3 - Selsey/East Wittering/Bracklesham	33,515	34,139	35,065	36,666	38,176	39,550
Zone 4 - Bognor Regis	73,660	75,072	77,165	80,773	84,164	87,264
Zone 5 - South Downs (North)	31,605	32,048	32,703	33,870	34,994	35,977
Zone 6 - Arundel/Littlehampton	74,409	75,832	77,948	81,577	84,967	88,084
Zone 7 - Waterlooville/Havant	100,645	101,635	103,177	105,858	108,335	110,678
Total	400,739	406,812	415,894	431,732	446,709	460,319

Sources:

Experian 2016
Chichester District - OAN
Other LPA's - Office of National Statistics 2014 SNPP projections

Table 2 - Convenience Goods Expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	2,134	2,123	2,118	2,117	2,123
Zone 2 - Hayling Island/South Downs/Southbourne	2,336	2,324	2,318	2,318	2,324
Zone 3 - Selsey/East Wittering/Bracklesham	2,337	2,324	2,319	2,319	2,325
Zone 4 - Bognor Regis	2,124	2,113	2,108	2,107	2,113
Zone 5 - South Downs (North)	2,599	2,586	2,580	2,579	2,587
Zone 6 - Arundel/Littlehampton	2,184	2,173	2,168	2,167	2,173
Zone 7 - Waterlooville/Havant	2,080	2,069	2,064	2,063	2,069

Sources:

Experian Local Expenditure 2016 (2016 prices)
Growth Rates: -0.6% in 2018, -0.2% in 2019 and 0.1% beyond 2019.
Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total Convenience Goods Expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	70.65	71.75	74.21	76.76	79.21
Zone 2 - Hayling Island/South Downs/Southbourne	128.42	130.22	134.34	138.64	142.86
Zone 3 - Selsey/East Wittering/Bracklesham	79.77	81.51	85.03	88.51	91.96
Zone 4 - Bognor Regis	159.42	163.01	170.24	177.34	184.41
Zone 5 - South Downs (North)	83.30	84.57	87.38	90.26	93.06
Zone 6 - Arundel/Littlehampton	165.61	169.35	176.83	184.12	191.43
Zone 7 - Waterlooville/Havant	211.36	213.45	218.49	223.55	229.04
Study Area Total	898.52	913.85	946.52	979.19	1,011.98

Source: Tables 1 and 2

Table 4 - Base Year 2018 Convenience Goods Market Shares By Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Aldi, Barnfield Drive, Chichester	7.3%	3.8%	4.9%	1.2%	3.4%	0.3%	0.0%	4.0%
Lidl, Portfield Way, Chichester	6.3%	1.3%	3.5%	0.6%	1.5%	0.0%	0.0%	4.0%
Sainsbury's, Westhampnett Road, Chichester	19.9%	9.4%	16.2%	1.5%	6.6%	1.4%	0.0%	4.0%
Tesco Extra, Fishbourne Road East, Chichester	27.9%	6.9%	19.4%	1.2%	5.4%	0.3%	1.5%	4.0%
Waitrose, Via Ravenna, Chichester	10.9%	5.2%	4.9%	0.9%	0.7%	2.7%	0.0%	5.0%
Other Chichester	24.2%	6.8%	4.5%	4.6%	2.2%	0.9%	0.5%	4.0%
Asda, Selsey	0.0%	0.2%	12.6%	0.0%	0.0%	0.0%	0.0%	3.0%
Selsey	0.0%	0.0%	13.3%	0.0%	0.0%	0.0%	0.0%	2.5%
East Wittering/Bracklesham	0.6%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	2.5%
Chichester rural	0.6%	7.5%	2.5%	0.6%	0.3%	0.0%	0.0%	2.5%
Chichester District Total	97.7%	41.1%	93.8%	10.6%	20.1%	5.6%	2.0%	n/a
Bognor Regis	0.5%	0.5%	5.8%	85.9%	1.6%	2.2%	0.0%	n/a
Haslemere	0.0%	0.0%	0.0%	0.0%	4.5%	0.1%	0.2%	n/a
Havant/Waterlooville	1.0%	54.6%	0.4%	0.3%	2.0%	0.2%	89.0%	n/a
Horsham	0.0%	0.0%	0.0%	0.6%	3.0%	0.3%	1.5%	n/a
Littlehampton	0.2%	0.7%	0.0%	2.3%	1.1%	80.5%	0.2%	n/a
Midhurst	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.9%	n/a
Petersfield/Liss	0.0%	0.0%	0.0%	0.0%	18.9%	0.0%	0.6%	n/a
Portsmouth	0.3%	2.9%	0.0%	0.3%	0.3%	1.0%	4.4%	n/a
Worthing	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	n/a
Other	0.3%	0.2%	0.0%	0.0%	39.6%	3.3%	1.2%	n/a
Other Total	2.3%	58.9%	6.2%	89.4%	79.9%	94.4%	98.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey January 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' Estimates

Table 5 - Base Year 2018 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	70.65	128.42	79.77	159.42	83.30	165.61	211.36		898.52
Aldi, Barnfield Drive, Chichester	5.16	4.88	3.91	1.91	2.83	0.50	0.00	0.80	19.99
Lidl, Portfield Way, Chichester	4.45	1.67	2.79	0.96	1.25	0.00	0.00	0.46	11.58
Sainsbury's, Westhampnett Road, Chichester	14.06	12.07	12.92	2.39	5.50	2.32	0.00	2.05	51.31
Tesco Extra, Fishbourne Road East, Chichester	19.71	8.86	15.48	1.91	4.50	0.50	3.17	2.26	56.38
Waitrose, Via Ravenna, Chichester	7.70	6.68	3.91	1.43	0.58	4.47	0.00	1.30	26.08
Other Chichester	17.10	8.73	3.59	7.33	1.83	1.49	1.06	1.71	42.85
Asda, Selsey	0.00	0.26	10.05	0.00	0.00	0.00	0.00	0.32	10.63
Selsey	0.00	0.00	10.61	0.00	0.00	0.00	0.00	0.27	10.88
East Wittering/Bracklesham	0.42	0.00	9.57	0.00	0.00	0.00	0.00	0.26	10.25
Chichester rural	0.42	9.63	1.99	0.96	0.25	0.00	0.00	0.34	13.60
Chichester District Total	69.02	52.78	74.82	16.90	16.74	9.27	4.23	9.78	253.54
Bognor Regis	0.35	0.64	4.63	136.94	1.33	3.64	0.00		147.54
Haslemere	0.00	0.00	0.00	0.00	3.75	0.17	0.42		4.34
Havant/Waterlooville	0.71	70.12	0.32	0.48	1.67	0.33	188.11		261.73
Horsham	0.00	0.00	0.00	0.96	2.50	0.50	3.17		7.12
Littlehampton	0.14	0.90	0.00	3.67	0.92	133.32	0.42		139.36
Midhurst	0.00	0.00	0.00	0.00	7.41	0.00	1.90		9.32
Petersfield/Liss	0.00	0.00	0.00	0.00	15.74	0.00	1.27		17.01
Portsmouth	0.21	3.72	0.00	0.48	0.25	1.66	9.30		15.62
Worthing	0.00	0.00	0.00	0.00	0.00	11.26	0.00		11.26
Other	0.21	0.26	0.00	0.00	32.99	5.47	2.54		41.46
Other Total	1.62	75.64	4.95	142.52	66.56	156.34	207.13		654.75
TOTAL	70.65	128.42	79.77	159.42	83.30	165.61	211.36	9.78	908.29

Source: Tables 3 and 4

Table 6 - Future 2021 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	71.75	130.22	81.51	163.01	84.57	169.35	213.45		913.85
Aldi, Barnfield Drive, Chichester	5.24	4.95	3.99	1.96	2.88	0.51	0.00	0.81	20.33
Lidl, Portfield Way, Chichester	4.52	1.69	2.85	0.98	1.27	0.00	0.00	0.47	11.78
Sainsbury's, Westhampnett Road, Chichester	14.28	12.24	13.20	2.45	5.58	2.37	0.00	2.09	52.21
Tesco Extra, Fishbourne Road East, Chichester	20.02	8.98	15.81	1.96	4.57	0.51	3.20	2.29	57.34
Waitrose, Via Ravenna, Chichester	7.82	6.77	3.99	1.47	0.59	4.57	0.00	1.33	26.54
Other Chichester	17.36	8.85	3.67	7.50	1.86	1.52	1.07	1.74	43.58
Asda, Selsey	0.00	0.26	10.27	0.00	0.00	0.00	0.00	0.33	10.86
Selsey	0.00	0.00	10.84	0.00	0.00	0.00	0.00	0.28	11.12
East Wittering/Bracklesham	0.43	0.00	9.78	0.00	0.00	0.00	0.00	0.26	10.47
Chichester rural	0.43	9.77	2.04	0.98	0.25	0.00	0.00	0.35	13.81
Chichester District Total	70.09	53.52	76.45	17.28	17.00	9.48	4.27	9.95	258.04
Bognor Regis	0.36	0.65	4.73	140.03	1.35	3.73	0.00		150.84
Haslemere	0.00	0.00	0.00	0.00	3.81	0.17	0.43		4.40
Havant/Waterlooville	0.72	71.10	0.33	0.49	1.69	0.34	189.97		264.63
Horsham	0.00	0.00	0.00	0.98	2.54	0.51	3.20		7.22
Littlehampton	0.14	0.91	0.00	3.75	0.93	136.33	0.43		142.49
Midhurst	0.00	0.00	0.00	0.00	7.53	0.00	1.92		9.45
Petersfield/Liss	0.00	0.00	0.00	0.00	15.98	0.00	1.28		17.26
Portsmouth	0.22	3.78	0.00	0.49	0.25	1.69	9.39		15.82
Worthing	0.00	0.00	0.00	0.00	0.00	11.52	0.00		11.52
Other	0.22	0.26	0.00	0.00	33.49	5.59	2.56		42.11
Other Total	1.65	76.70	5.05	145.73	67.57	159.87	209.18		665.75
TOTAL	71.75	130.22	81.51	163.01	84.57	169.35	213.45	9.95	923.80

Source: Tables 3 and 4

Table 7 - Future 2026 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	74.21	134.34	85.03	170.24	87.38	176.83	218.49		946.52
Aldi, Barnfield Drive, Chichester	5.42	5.10	4.17	2.04	2.97	0.53	0.00	0.84	21.08
Lidl, Portfield Way, Chichester	4.68	1.75	2.98	1.02	1.31	0.00	0.00	0.49	12.22
Sainsbury's, Westhampnett Road, Chichester	14.77	12.63	13.78	2.55	5.77	2.48	0.00	2.17	54.13
Tesco Extra, Fishbourne Road East, Chichester	20.70	9.27	16.50	2.04	4.72	0.53	3.28	2.38	59.42
Waitrose, Via Ravenna, Chichester	8.09	6.99	4.17	1.53	0.61	4.77	0.00	1.38	27.54
Other Chichester	17.96	9.14	3.83	7.83	1.92	1.59	1.09	1.81	45.16
Asda, Selsey	0.00	0.27	10.71	0.00	0.00	0.00	0.00	0.34	11.32
Selsey	0.00	0.00	11.31	0.00	0.00	0.00	0.00	0.29	11.60
East Wittering/Bracklesham	0.45	0.00	10.20	0.00	0.00	0.00	0.00	0.27	10.92
Chichester rural	0.45	10.08	2.13	1.02	0.26	0.00	0.00	0.36	14.29
Chichester District Total	72.50	55.21	79.76	18.05	17.56	9.90	4.37	10.32	267.68
Bognor Regis	0.37	0.67	4.93	146.24	1.40	3.89	0.00		157.50
Haslemere	0.00	0.00	0.00	0.00	3.93	0.18	0.44		4.55
Havant/Waterlooville	0.74	73.35	0.34	0.51	1.75	0.35	194.46		271.50
Horsham	0.00	0.00	0.00	1.02	2.62	0.53	3.28		7.45
Littlehampton	0.15	0.94	0.00	3.92	0.96	142.34	0.44		148.75
Midhurst	0.00	0.00	0.00	0.00	7.78	0.00	1.97		9.74
Petersfield/Liss	0.00	0.00	0.00	0.00	16.52	0.00	1.31		17.83
Portsmouth	0.22	3.90	0.00	0.51	0.26	1.77	9.61		16.27
Worthing	0.00	0.00	0.00	0.00	0.00	12.02	0.00		12.02
Other	0.22	0.27	0.00	0.00	34.60	5.84	2.62		43.55
Other Total	1.71	79.13	5.27	152.19	69.82	166.92	214.12		689.16
TOTAL	74.21	134.34	85.03	170.24	87.38	176.83	218.49	10.32	956.84

Source: Tables 3 and 4

Table 8 - Future 2031 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	76.76	138.64	88.51	177.34	90.26	184.12	223.55		979.19
Aldi, Barnfield Drive, Chichester	5.60	5.27	4.34	2.13	3.07	0.55	0.00	0.87	21.83
Lidl, Portfield Way, Chichester	4.84	1.80	3.10	1.06	1.35	0.00	0.00	0.51	12.66
Sainsbury's, Westhampnett Road, Chichester	15.28	13.03	14.34	2.66	5.96	2.58	0.00	2.24	56.09
Tesco Extra, Fishbourne Road East, Chichester	21.42	9.57	17.17	2.13	4.87	0.55	3.35	2.46	61.52
Waitrose, Via Ravenna, Chichester	8.37	7.21	4.34	1.60	0.63	4.97	0.00	1.43	28.54
Other Chichester	18.58	9.43	3.98	8.16	1.99	1.66	1.12	1.87	46.78
Asda, Selsey	0.00	0.28	11.15	0.00	0.00	0.00	0.00	0.35	11.78
Selsey	0.00	0.00	11.77	0.00	0.00	0.00	0.00	0.30	12.07
East Wittering/Bracklesham	0.46	0.00	10.62	0.00	0.00	0.00	0.00	0.28	11.37
Chichester rural	0.46	10.40	2.21	1.06	0.27	0.00	0.00	0.37	14.78
Chichester District Total	75.00	56.98	83.02	18.80	18.14	10.31	4.47	10.69	277.42
Bognor Regis	0.38	0.69	5.13	152.34	1.44	4.05	0.00		164.04
Haslemere	0.00	0.00	0.00	0.00	4.06	0.18	0.45		4.69
Havant/Waterlooville	0.77	75.70	0.35	0.53	1.81	0.37	198.96		278.48
Horsham	0.00	0.00	0.00	1.06	2.71	0.55	3.35		7.68
Littlehampton	0.15	0.97	0.00	4.08	0.99	148.22	0.45		154.86
Midhurst	0.00	0.00	0.00	0.00	8.03	0.00	2.01		10.04
Petersfield/Liss	0.00	0.00	0.00	0.00	17.06	0.00	1.34		18.40
Portsmouth	0.23	4.02	0.00	0.53	0.27	1.84	9.84		16.73
Worthing	0.00	0.00	0.00	0.00	0.00	12.52	0.00		12.52
Other	0.23	0.28	0.00	0.00	35.74	6.08	2.68		45.01
Other Total	1.77	81.66	5.49	158.54	72.12	173.81	219.08		712.46
TOTAL	76.76	138.64	88.51	177.34	90.26	184.12	223.55	10.69	989.88

Source: Tables 3 and 4

Table 9 - Future 2036 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	79.21	142.86	91.96	184.41	93.06	191.43	229.04		1,011.98
Aldi, Barnfield Drive, Chichester	5.78	5.43	4.51	2.21	3.16	0.57	0.00	0.90	22.57
Lidl, Portfield Way, Chichester	4.99	1.86	3.22	1.11	1.40	0.00	0.00	0.52	13.09
Sainsbury's, Westhampnett Road, Chichester	15.76	13.43	14.90	2.77	6.14	2.68	0.00	2.32	58.00
Tesco Extra, Fishbourne Road East, Chichester	22.10	9.86	17.84	2.21	5.03	0.57	3.44	2.54	63.59
Waitrose, Via Ravenna, Chichester	8.63	7.43	4.51	1.66	0.65	5.17	0.00	1.48	29.53
Other Chichester	19.17	9.71	4.14	8.48	2.05	1.72	1.15	1.93	48.36
Asda, Selsey	0.00	0.29	11.59	0.00	0.00	0.00	0.00	0.37	12.24
Selsey	0.00	0.00	12.23	0.00	0.00	0.00	0.00	0.31	12.54
East Wittering/Bracklesham	0.48	0.00	11.04	0.00	0.00	0.00	0.00	0.30	11.81
Chichester rural	0.48	10.71	2.30	1.11	0.28	0.00	0.00	0.38	15.26
Chichester District Total	77.39	58.72	86.26	19.55	18.71	10.72	4.58	11.06	286.98
Bognor Regis	0.40	0.71	5.33	158.41	1.49	4.21	0.00		170.55
Haslemere	0.00	0.00	0.00	0.00	4.19	0.19	0.46		4.84
Havant/Waterlooville	0.79	78.00	0.37	0.55	1.86	0.38	203.85		285.81
Horsham	0.00	0.00	0.00	1.11	2.79	0.57	3.44		7.91
Littlehampton	0.16	1.00	0.00	4.24	1.02	154.10	0.46		160.98
Midhurst	0.00	0.00	0.00	0.00	8.28	0.00	2.06		10.34
Petersfield/Liss	0.00	0.00	0.00	0.00	17.59	0.00	1.37		18.96
Portsmouth	0.24	4.14	0.00	0.55	0.28	1.91	10.08		17.21
Worthing	0.00	0.00	0.00	0.00	0.00	13.02	0.00		13.02
Other	0.24	0.29	0.00	0.00	36.85	6.32	2.75		46.44
Other Total	1.82	84.15	5.70	164.86	74.36	180.71	224.46		736.06
TOTAL	79.21	142.86	91.96	184.41	93.06	191.43	229.04	11.06	1,023.04

Source: Tables 3 and 4

Table 10A - Convenience Goods Floorspace in Chichester Main Settlements (2016 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Chichester					
Aldi, Barnfield Drive	1,004	85%	853	£11,145	£9.51
Lidl, Portfield Way	886	85%	753	£8,661	£6.52
Sainsbury's, Westhampnett Road	6,281	65%	4,083	£11,068	£45.19
Tesco Extra, Fishbourne Road East	6,667	65%	4,334	£12,221	£52.96
Waitrose, Via Ravenna	2,180	90%	1,962	£13,042	£25.59
Co-op, Bognor Road	257	95%	244	£10,298	£2.51
Co-op, Oliver Whitby Road	199	95%	189	£10,298	£1.95
Co-op, Spitalfield Road	219	95%	208	£10,298	£2.14
Co-op, Stockbridge Road	242	95%	230	£10,298	£2.37
Iceland, Barnfield Drive	667	98%	654	£6,451	£4.22
Iceland, South Street	428	98%	419	£6,451	£2.71
M&S Foodhall, East Street	536	95%	509	£11,283	£5.75
M&S Foodhall, Portfield Retail Park	840	95%	798	£11,283	£9.00
Tesco Express, South Street	220	95%	209	£12,221	£2.55
Tesco Express, St James Road	119	95%	113	£12,221	£1.38
Other Chichester town centre	2,100	100%	2,100	n/a	n/a
	22,845		17,658		£174.35
Selsey					
Asda, Wave Approach	1,350	75%	1,013	£13,317	£13.48
Co-op, High Street	696	95%	661	£10,298	£6.81
Co-op, 123-125 High Street	317	95%	301	£10,298	£3.10
Other Selsey	575	100%	575	n/a	n/a
	2,938		2,550		£23.39
East Wittering/Bracklesham					
Co-op, The Parade, Cakeham Road	328	95%	312	£10,298	£3.21
Tesco Express, Kingfisher Parade	242	95%	230	£12,221	£2.81
Other East Wittering/Bracklesham	480	100%	480	n/a	n/a
	1,050		1,022		£6.02
TOTAL	26,833		21,230		£203.76

Source: Experian Goad Plan May 2017, VOA and ORC Storepoint 2018 and Global Data 2017

Table 10B - Other Convenience Goods Floorspace in Chichester District (2016 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Tangmere					
Co-op, Malcolm Road	196	95%	186	£10,298	£1.92
One Stop	150	100%	150	n/a	n/a
	346		336		£1.92
Southbourne					
Co-op, Main Road	229	95%	218	£10,298	£2.24
Tesco Express, Stein Road	135	95%	128	£12,221	£1.57
Other Southbourne	200	100%	200	n/a	n/a
	564		546		£3.81
Other Chichester District			0		
Co-op, Delling Lane, Bosham	346	95%	329	£10,298	£3.38
Co-op, Station Road, Bosham	77	95%	73	£10,298	£0.75
Co-op, The Square, Westbourne	346	95%	329	£10,298	£3.38
	769		731		£7.52
TOTAL	1,679		1,613		£13.25

Source: Lichfields' survey, VOA and ORC Storepoint 2018 and Global Data 2017

Table 11 - Summary of Convenience Goods Expenditure 2018 to 2036 (£M)

Area	2018	2021	2026	2031	2036
Available Expenditure					
Chichester	208.19	211.79	219.54	227.42	235.13
Selsey	21.51	21.97	22.92	23.86	24.78
East Wittering/Bracklesham	10.25	10.47	10.92	11.37	11.81
Chichester rural	13.60	13.81	14.29	14.78	15.26
Total	253.54	258.04	267.68	277.42	286.98
Turnover of Existing Facilities					
Chichester	208.19	208.19	208.19	208.19	208.19
Selsey	21.51	21.51	21.51	21.51	21.51
East Wittering/Bracklesham	10.25	10.25	10.25	10.25	10.25
Chichester rural	13.60	13.60	13.60	13.60	13.60
Total	253.54	253.54	253.54	253.54	253.54
Surplus/Deficit Expenditure £M					
Chichester	0.00	3.60	11.36	19.23	26.95
Selsey	0.00	0.47	1.41	2.35	3.28
East Wittering/Bracklesham	0.00	0.22	0.67	1.11	1.55
Chichester rural	0.00	0.22	0.69	1.18	1.66
Total	0.00	4.50	14.13	23.87	33.44

Source: Tables 5 to 10

Table 12 - Convenience Goods Floorspace Capacity

	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Projection (sq.m net)				
Chichester	300	946	1,603	2,246
Selsey	39	118	196	273
East Wittering/Bracklesham	18	56	93	129
Chichester rural	18	58	98	138
	375	1,178	1,989	2,786
Floorspace Projection (sq.m gross)				
Chichester	428	1,352	2,289	3,208
Selsey	56	168	280	390
East Wittering/Bracklesham	26	80	133	185
Chichester rural	26	82	140	198
	536	1,682	2,842	3,981

Source: Table 11

Appendix 3: Comparison Goods Capacity

Table 1 - Study Area Population

Zone	2016	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	32,640	33,109	33,800	35,042	36,257	37,307
Zone 2 - Hayling Island/South Downs/Southbourne	54,265	54,978	56,037	57,945	59,817	61,459
Zone 3 - Selsey/East Wittering/Bracklesham	33,515	34,139	35,065	36,666	38,176	39,550
Zone 4 - Bognor Regis	73,660	75,072	77,165	80,773	84,164	87,264
Zone 5 - South Downs (North)	31,605	32,048	32,703	33,870	34,994	35,977
Zone 6 - Arundel/Littlehampton	74,409	75,832	77,948	81,577	84,967	88,084
Zone 7 - Waterloo/Havant	100,645	101,635	103,177	105,858	108,335	110,678
Total	400,739	406,812	415,894	431,732	446,709	460,319

Sources:

Experian 2016
 Chichester District - OAN
 Other LPA's - Office of National Statistics 2014 SNPP projections

Table 2 - Comparison Goods Expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	3,037	3,244	3,769	4,396	5,134
Zone 2 - Hayling Island/South Downs/Southbourne	3,639	3,887	4,517	5,269	6,152
Zone 3 - Selsey/East Wittering/Bracklesham	3,220	3,439	3,996	4,661	5,443
Zone 4 - Bognor Regis	3,006	3,210	3,730	4,351	5,081
Zone 5 - South Downs (North)	3,701	3,953	4,594	5,358	6,257
Zone 6 - Arundel/Littlehampton	3,051	3,258	3,787	4,417	5,157
Zone 7 - Waterloo/Havant	2,764	2,952	3,430	4,001	4,673

Sources:

Experian Local Expenditure 2016 (2016 prices)
 Growth Rates: 0.9% in 2018, 2.1% in 2019 and 3.2% beyond 2019
 Excludes Special Forms of Trading

Table 3 - Total Comparison Goods Expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	100.55	109.65	132.07	159.39	191.53
Zone 2 - Hayling Island/South Downs/Southbourne	200.06	217.81	261.74	315.18	378.10
Zone 3 - Selsey/East Wittering/Bracklesham	109.93	120.59	146.52	177.94	215.27
Zone 4 - Bognor Regis	225.67	247.70	301.28	366.20	443.39
Zone 5 - South Downs (North)	118.61	129.28	155.60	187.50	225.11
Zone 6 - Arundel/Littlehampton	231.36	253.95	308.93	375.30	454.25
Zone 7 - Waterloo/Havant	280.92	304.58	363.09	433.45	517.20
Study Area Total	1,267.10	1,383.56	1,669.24	2,014.94	2,424.84

Source: Tables 1 and 2

Table 4 - Base Year 2018 Comparison Goods Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Chichester town centre	62.3%	37.1%	47.9%	34.6%	17.3%	17.5%	9.9%	6.0%
Chichester other	22.3%	10.7%	17.9%	3.3%	8.7%	5.0%	1.4%	0.5%
Selsey	0.3%	0.0%	10.2%	0.1%	0.0%	0.0%	0.6%	0.5%
East Wittering/Bracklesham	0.2%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Chichester rural	0.2%	0.5%	0.5%	0.0%	0.0%	0.0%	0.1%	0.5%
Chichester District Total	85.3%	48.3%	80.5%	38.0%	26.0%	22.5%	12.0%	n/a
Bognor Regis	2.8%	1.2%	5.9%	42.5%	1.3%	5.9%	0.1%	n/a
Havant/Waterlooville	1.0%	28.4%	1.4%	0.6%	2.4%	0.1%	58.7%	n/a
Horsham	0.0%	0.0%	0.0%	0.2%	13.3%	0.1%	0.0%	n/a
Littlehampton	0.0%	0.3%	0.1%	1.6%	0.9%	37.1%	0.0%	n/a
Midhurst	0.0%	0.6%	0.0%	0.0%	4.6%	0.0%	0.0%	n/a
Portsmouth	5.3%	14.3%	6.7%	4.8%	3.9%	0.7%	20.3%	n/a
Worthing	0.9%	0.4%	0.2%	0.8%	2.7%	25.4%	0.1%	n/a
Other	4.7%	6.5%	5.2%	11.5%	44.9%	8.2%	8.8%	n/a
Other Total	14.7%	51.7%	19.5%	62.0%	74.0%	77.5%	88.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey January 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' Estimates

Table 5 - Base Year 2018 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	100.55	200.06	109.93	225.67	118.61	231.36	280.92		1,267.10
Chichester town centre	62.64	74.22	52.66	78.08	20.52	40.49	27.81	22.75	379.17
Chichester other	22.42	21.41	19.68	7.45	10.32	11.57	3.93	0.49	97.26
Selsey	0.30	0.00	11.21	0.23	0.00	0.00	1.69	0.07	13.49
East Wittering/Bracklesham	0.20	0.00	4.40	0.00	0.00	0.00	0.00	0.02	4.62
Chichester rural	0.20	1.00	0.55	0.00	0.00	0.00	0.28	0.01	2.04
Chichester District Total	85.77	96.63	88.49	85.75	30.84	52.06	33.71	23.34	496.59
Bognor Regis	2.82	2.40	6.49	95.91	1.54	13.65	0.28		123.08
Havant/Waterlooville	1.01	56.82	1.54	1.35	2.85	0.23	164.90		228.69
Horsham	0.00	0.00	0.00	0.45	15.77	0.23	0.00		16.46
Littlehampton	0.00	0.60	0.11	3.61	1.07	85.84	0.00		91.22
Midhurst	0.00	1.20	0.00	0.00	5.46	0.00	0.00		6.66
Portsmouth	5.33	28.61	7.37	10.83	4.63	1.62	57.03		115.41
Worthing	0.90	0.80	0.22	1.81	3.20	58.77	0.28		65.98
Other	4.73	13.00	5.72	25.95	53.25	18.97	24.72		146.35
Other Total	14.78	103.43	21.44	139.91	87.77	179.31	247.21		793.85
TOTAL	100.55	200.06	109.93	225.67	118.61	231.36	280.92	23.34	1,290.44

Source: Tables 3 and 4

Table 6 - 2021 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	109.65	217.81	120.59	247.70	129.28	253.95	304.58		1,383.56
Chichester town centre	68.31	80.81	57.76	85.70	22.36	44.44	30.15	24.86	414.41
Chichester other	24.45	23.31	21.59	8.17	11.25	12.70	4.26	0.53	106.26
Selsey	0.33	0.00	12.30	0.25	0.00	0.00	1.83	0.07	14.78
East Wittering/Bracklesham	0.22	0.00	4.82	0.00	0.00	0.00	0.00	0.03	5.07
Chichester rural	0.22	1.09	0.60	0.00	0.00	0.00	0.30	0.01	2.23
Chichester District Total	93.53	105.20	97.07	94.13	33.61	57.14	36.55	25.51	542.74
Bognor Regis	3.07	2.61	7.11	105.27	1.68	14.98	0.30		135.04
Havant/Waterlooville	1.10	61.86	1.69	1.49	3.10	0.25	178.79		248.27
Horsham	0.00	0.00	0.00	0.50	17.19	0.25	0.00		17.94
Littlehampton	0.00	0.65	0.12	3.96	1.16	94.22	0.00		100.12
Midhurst	0.00	1.31	0.00	0.00	5.95	0.00	0.00		7.25
Portsmouth	5.81	31.15	8.08	11.89	5.04	1.78	61.83		125.58
Worthing	0.99	0.87	0.24	1.98	3.49	64.50	0.30		72.38
Other	5.15	14.16	6.27	28.49	58.04	20.82	26.80		159.74
Other Total	16.12	112.61	23.51	153.57	95.66	196.81	268.03		866.32
TOTAL	109.65	217.81	120.59	247.70	129.28	253.95	304.58	25.51	1,409.06

Source: Tables 3 and 4

Table 7 - 2026 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	132.07	261.74	146.52	301.28	155.60	308.93	363.09		1,669.24
Chichester town centre	82.28	97.10	70.18	104.24	26.92	54.06	35.95	30.05	500.79
Chichester other	29.45	28.01	26.23	9.94	13.54	15.45	5.08	0.64	128.34
Selsey	0.40	0.00	14.94	0.30	0.00	0.00	2.18	0.09	17.91
East Wittering/Bracklesham	0.26	0.00	5.86	0.00	0.00	0.00	0.00	0.03	6.16
Chichester rural	0.26	1.31	0.73	0.00	0.00	0.00	0.36	0.01	2.68
Chichester District Total	112.66	126.42	117.95	114.49	40.46	69.51	43.57	30.82	655.87
Bognor Regis	3.70	3.14	8.64	128.04	2.02	18.23	0.36		164.14
Havant/Waterlooville	1.32	74.33	2.05	1.81	3.73	0.31	213.14		296.69
Horsham	0.00	0.00	0.00	0.60	20.69	0.31	0.00		21.61
Littlehampton	0.00	0.79	0.15	4.82	1.40	114.61	0.00		121.77
Midhurst	0.00	1.57	0.00	0.00	7.16	0.00	0.00		8.73
Portsmouth	7.00	37.43	9.82	14.46	6.07	2.16	73.71		150.65
Worthing	1.19	1.05	0.29	2.41	4.20	78.47	0.36		87.97
Other	6.21	17.01	7.62	34.65	69.86	25.33	31.95		192.64
Other Total	19.42	135.32	28.57	186.79	115.14	239.42	319.52		1,044.19
TOTAL	132.07	261.74	146.52	301.28	155.60	308.93	363.09	30.82	1,700.06

Source: Tables 3 and 4

Table 8 - 2031 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	159.39	315.18	177.94	366.20	187.50	375.30	433.45		2,014.94
Chichester town centre	99.30	116.93	85.23	126.70	32.44	65.68	42.91	36.33	605.52
Chichester other	35.54	33.72	31.85	12.08	16.31	18.76	6.07	0.78	155.12
Selsey	0.48	0.00	18.15	0.37	0.00	0.00	2.60	0.11	21.70
East Wittering/Bracklesham	0.32	0.00	7.12	0.00	0.00	0.00	0.00	0.04	7.47
Chichester rural	0.32	1.58	0.89	0.00	0.00	0.00	0.43	0.02	3.23
Chichester District Total	135.96	152.23	143.24	139.15	48.75	84.44	52.01	37.27	793.06
Bognor Regis	4.46	3.78	10.50	155.63	2.44	22.14	0.43		199.39
Havant/Waterlooville	1.59	89.51	2.49	2.20	4.50	0.38	254.43		355.10
Horsham	0.00	0.00	0.00	0.73	24.94	0.38	0.00		26.04
Littlehampton	0.00	0.95	0.18	5.86	1.69	139.24	0.00		147.91
Midhurst	0.00	1.89	0.00	0.00	8.62	0.00	0.00		10.52
Portsmouth	8.45	45.07	11.92	17.58	7.31	2.63	87.99		180.95
Worthing	1.43	1.26	0.36	2.93	5.06	95.33	0.43		106.80
Other	7.49	20.49	9.25	42.11	84.19	30.77	38.14		232.45
Other Total	23.43	162.95	34.70	227.04	138.75	290.86	381.44		1,259.15
TOTAL	159.39	315.18	177.94	366.20	187.50	375.30	433.45	37.27	2,052.21

Source: Tables 3 and 4

Table 9 - 2036 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	191.53	378.10	215.27	443.39	225.11	454.25	517.20		2,424.84
Chichester town centre	119.33	140.27	103.11	153.41	38.94	79.49	51.20	43.77	729.54
Chichester other	42.71	40.46	38.53	14.63	19.58	22.71	7.24	0.93	186.80
Selsey	0.57	0.00	21.96	0.44	0.00	0.00	3.10	0.13	26.21
East Wittering/Bracklesham	0.38	0.00	8.61	0.00	0.00	0.00	0.00	0.05	9.04
Chichester rural	0.38	1.89	1.08	0.00	0.00	0.00	0.52	0.02	3.89
Chichester District Total	163.38	182.62	173.29	168.49	58.53	102.21	62.06	44.90	955.48
Bognor Regis	5.36	4.54	12.70	188.44	2.93	26.80	0.52		241.29
Havant/Waterlooville	1.92	107.38	3.01	2.66	5.40	0.45	303.59		424.42
Horsham	0.00	0.00	0.00	0.89	29.94	0.45	0.00		31.28
Littlehampton	0.00	1.13	0.22	7.09	2.03	168.53	0.00		179.00
Midhurst	0.00	2.27	0.00	0.00	10.35	0.00	0.00		12.62
Portsmouth	10.15	54.07	14.42	21.28	8.78	3.18	104.99		216.87
Worthing	1.72	1.51	0.43	3.55	6.08	115.38	0.52		129.19
Other	9.00	24.58	11.19	50.99	101.07	37.25	45.51		279.60
Other Total	28.16	195.48	41.98	274.90	166.58	352.04	455.13		1,514.27
TOTAL	191.53	378.10	215.27	443.39	225.11	454.25	517.20	44.90	2,469.75

Source: Tables 3 and 4

Table 10 - Comparison Goods Sales Floorspace in Chichester

Area	Sales Floorspace Sq.M Net
Chichester town centre comparison shops	40,890
Chichester food stores	5,230
Chichester retail warehouses	21,600
Chichester sub-total	67,720
Selsey	1,220
Selsey food stores	388
East Wittering/Bracklesham	1,980
Southbourne	60
TOTAL	71,368

Source: Goad Plan May 2017, VOA, Completely Retail and Lichfields' site survey.

Table 11 - Summary of Comparison Goods Expenditure 2018 to 2036 (£M)

Area	2018	2021	2026	2031	2036
Available Expenditure					
Chichester town centre	379.17	414.41	500.79	605.52	729.54
Chichester other	97.26	106.26	128.34	155.12	186.80
Selsey	13.49	14.78	17.91	21.70	26.21
East Wittering/Bracklesham	4.62	5.07	6.16	7.47	9.04
Chichester rural	2.04	2.23	2.68	3.23	3.89
Total	496.59	542.74	655.87	793.06	955.48
Benchmark Turnover of Existing Facilities					
Chichester town centre	379.17	398.43	445.53	496.75	553.85
Chichester other*	97.26	109.43	122.37	136.43	152.12
Selsey	13.49	14.18	15.85	17.68	19.71
East Wittering/Bracklesham	4.62	4.86	5.43	6.05	6.75
Chichester rural	2.04	2.15	2.40	2.68	2.98
Total	496.59	529.04	591.59	659.59	735.41
Surplus Expenditure (£m)					
Chichester town centre	0.00	15.98	55.25	108.77	175.69
Chichester other	0.00	-3.17	5.97	18.69	34.69
Selsey	0.00	0.60	2.06	4.03	6.50
East Wittering/Bracklesham	0.00	0.21	0.73	1.42	2.29
Chichester rural	0.00	0.08	0.28	0.56	0.90
Total	0.00	13.70	64.29	133.47	220.07

Source: Tables 5 to 9

* The Range occupation of former BHS store and new mezzanine floor added at 2021 (turnover £7.23 million)

Table 12 - Chichester Comparison Goods Floorspace Capacity up to 2036

	2018	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£7,000	£7,356	£8,225	£9,171	£10,225
Floorspace Projection (sq.m net)					
Chichester town centre	0	2,172	6,718	11,861	17,183
Chichester other	0	-431	726	2,038	3,393
Selsey	0	82	250	439	636
East Wittering/Bracklesham	0	29	88	155	224
Chichester rural	0	11	34	61	88
Total	0	1,862	7,816	14,554	21,524
Floorspace Projection (sq.m gross)					
Chichester town centre	0	2,896	8,957	15,815	22,911
Chichester other	0	-575	968	2,717	4,524
Selsey	0	109	333	585	848
East Wittering/Bracklesham	0	38	118	206	298
Chichester rural	0	15	46	81	118
Total	0	2,483	10,421	19,405	28,698

Appendix 4: Food/Beverage Capacity

Table 1 - Study Area Population

Zone	2016	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	32,640	33,109	33,800	35,042	36,257	37,307
Zone 2 - Hayling Island/South Downs/Southbourne	54,265	54,978	56,037	57,945	59,817	61,459
Zone 3 - Selsey/East Wittering/Bracklesham	33,515	34,139	35,065	36,666	38,176	39,550
Zone 4 - Bognor Regis	73,660	75,072	77,165	80,773	84,164	87,264
Zone 5 - South Downs (North)	31,605	32,048	32,703	33,870	34,994	35,977
Zone 6 - Arundel/Littlehampton	74,409	75,832	77,948	81,577	84,967	88,084
Zone 7 - Waterloo/Havant	100,645	101,635	103,177	105,858	108,335	110,678
Total	400,739	406,812	415,894	431,732	446,709	460,319

Sources:

Experian 2016
Chichester District - OAN
Other LPA's - Office of National Statistics 2014 SNPP projections

Table 2 - Food and Beverage Expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	1,243	1,281	1,356	1,439	1,527
Zone 2 - Hayling Island/South Downs/Southbourne	1,240	1,277	1,352	1,435	1,523
Zone 3 - Selsey/East Wittering/Bracklesham	1,166	1,201	1,272	1,350	1,433
Zone 4 - Bognor Regis	1,090	1,123	1,188	1,261	1,338
Zone 5 - South Downs (North)	1,261	1,299	1,375	1,460	1,549
Zone 6 - Arundel/Littlehampton	1,135	1,170	1,238	1,314	1,395
Zone 7 - Waterloo/Havant	1,032	1,063	1,125	1,194	1,267

Sources:

Experian Local Expenditure 2016 (2016 prices)
Growth Rates: -0.1% in 2018, 0.8% in 2019, 1.1% from 2020 to 2024 and 1.2% p.a. beyond 2024

Table 3 - Total Food and Beverage Expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Chichester/Tangmere	41.16	43.30	47.50	52.17	56.98
Zone 2 - Hayling Island/South Downs/Southbourne	68.16	71.58	78.34	85.84	93.61
Zone 3 - Selsey/East Wittering/Bracklesham	39.81	42.13	46.62	51.53	56.66
Zone 4 - Bognor Regis	81.79	86.62	95.96	106.13	116.80
Zone 5 - South Downs (North)	40.42	42.49	46.57	51.08	55.74
Zone 6 - Arundel/Littlehampton	86.08	91.16	100.97	111.63	122.84
Zone 7 - Waterloo/Havant	104.85	109.66	119.08	129.35	140.27
Study Area Total	462.27	486.94	535.04	587.72	642.90

Source: Tables 1 and 2

Table 4 - Base Year 2018 Food and Beverage Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Chichester	87.8%	36.0%	50.0%	21.9%	12.2%	16.0%	8.5%	9.0%
Selsey	0.0%	0.0%	26.6%	0.0%	0.0%	0.0%	0.9%	3.0%
East Wittering / Bracklesham	0.8%	0.8%	12.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Other Chichester District	2.3%	8.2%	2.0%	0.8%	0.0%	1.0%	1.4%	3.0%
Chichester District Total	90.9%	45.0%	90.6%	22.7%	12.2%	17.0%	10.8%	
Havant/Waterlooville	0.6%	42.6%	0.5%	0.0%	0.6%	0.0%	60.9%	n/a
Bognor Regis/Littlehampton	1.7%	2.1%	3.5%	59.9%	0.0%	54.0%	0.0%	n/a
Portsmouth	4.7%	4.4%	0.9%	8.5%	0.0%	0.0%	18.4%	n/a
Other	2.1%	5.9%	4.5%	8.9%	87.2%	29.0%	9.9%	n/a
Other Total	9.1%	55.0%	9.4%	77.3%	87.8%	83.0%	89.2%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey January 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' Estimates

Table 5 - Base Year 2018 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	41.16	68.16	39.81	81.79	40.42	86.08	104.85		462.27
Chichester	36.14	24.54	19.91	17.91	4.93	13.77	8.91	12.47	138.59
Selsey	0.00	0.00	10.59	0.00	0.00	0.00	0.94	0.36	11.89
East Wittering / Bracklesham	0.33	0.55	4.78	0.00	0.00	0.00	0.00	0.17	5.83
Other Chichester District	0.95	5.59	0.80	0.65	0.00	0.86	1.47	0.32	10.63
Chichester District Total	37.42	30.67	36.07	18.57	4.93	14.63	11.32	13.32	166.94
Havant/Waterlooville	0.25	29.04	0.20	0.00	0.24	0.00	63.85		93.58
Bognor Regis/Littlehampton	0.70	1.43	1.39	48.99	0.00	46.48	0.00		99.00
Portsmouth	1.93	3.00	0.36	6.95	0.00	0.00	19.29		31.54
Other	0.86	4.02	1.79	7.28	35.24	24.96	10.38		84.54
Other Total	3.75	37.49	3.74	63.22	35.48	71.45	93.53		308.66
TOTAL	41.16	68.16	39.81	81.79	40.42	86.08	104.85	13.32	475.60

Source: Tables 3 and 4

Table 6 - 2021 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	43.30	71.58	42.13	86.62	42.49	91.16	109.66		486.94
Chichester	38.01	25.77	21.06	18.97	5.18	14.59	9.32	13.14	146.05
Selsey	0.00	0.00	11.21	0.00	0.00	0.00	0.99	0.38	12.57
East Wittering / Bracklesham	0.35	0.57	5.06	0.00	0.00	0.00	0.00	0.18	6.16
Other Chichester District	1.00	5.87	0.84	0.69	0.00	0.91	1.54	0.34	11.18
Chichester District Total	39.36	32.21	38.17	19.66	5.18	15.50	11.84	14.04	175.97
Havant/Waterlooville	0.26	30.49	0.21	0.00	0.25	0.00	66.79		98.01
Bognor Regis/Littlehampton	0.74	1.50	1.47	51.88	0.00	49.23	0.00		104.83
Portsmouth	2.03	3.15	0.38	7.36	0.00	0.00	20.18		33.10
Other	0.91	4.22	1.90	7.71	37.05	26.44	10.86		89.08
Other Total	3.94	39.37	3.96	66.96	37.31	75.66	97.82		325.02
TOTAL	43.30	71.58	42.13	86.62	42.49	91.16	109.66	14.04	500.99

Source: Tables 3 and 4

Table 7 - 2026 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	47.50	78.34	46.62	95.96	46.57	100.97	119.08		535.04
Chichester	41.71	28.20	23.31	21.01	5.68	16.16	10.12	14.46	160.65
Selsey	0.00	0.00	12.40	0.00	0.00	0.00	1.07	0.42	13.89
East Wittering / Bracklesham	0.38	0.63	5.59	0.00	0.00	0.00	0.00	0.20	6.81
Other Chichester District	1.09	6.42	0.93	0.77	0.00	1.01	1.67	0.37	12.26
Chichester District Total	43.18	35.25	42.24	21.78	5.68	17.16	12.86	15.45	193.61
Havant/Waterlooville	0.29	33.37	0.23	0.00	0.28	0.00	72.52		106.69
Bognor Regis/Littlehampton	0.81	1.65	1.63	57.48	0.00	54.52	0.00		116.09
Portsmouth	2.23	3.45	0.42	8.16	0.00	0.00	21.91		36.17
Other	1.00	4.62	2.10	8.54	40.61	29.28	11.79		97.94
Other Total	4.32	43.09	4.38	74.17	40.89	83.81	106.22		356.88
TOTAL	47.50	78.34	46.62	95.96	46.57	100.97	119.08	15.45	550.49

Source: Tables 3 and 4

Table 8 - 2031 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	52.17	85.84	51.53	106.13	51.08	111.63	129.35		587.72
Chichester	45.81	30.90	25.76	23.24	6.23	17.86	10.99	15.90	176.70
Selsey	0.00	0.00	13.71	0.00	0.00	0.00	1.16	0.46	15.33
East Wittering / Bracklesham	0.42	0.69	6.18	0.00	0.00	0.00	0.00	0.23	7.51
Other Chichester District	1.20	7.04	1.03	0.85	0.00	1.12	1.81	0.40	13.45
Chichester District Total	47.42	38.63	46.68	24.09	6.23	18.98	13.97	16.99	212.99
Havant/Waterlooville	0.31	36.57	0.26	0.00	0.31	0.00	78.78		116.22
Bognor Regis/Littlehampton	0.89	1.80	1.80	63.57	0.00	60.28	0.00		128.34
Portsmouth	2.45	3.78	0.46	9.02	0.00	0.00	23.80		39.51
Other	1.10	5.06	2.32	9.45	44.54	32.37	12.81		107.64
Other Total	4.75	47.21	4.84	82.04	44.85	92.65	115.38		391.72
TOTAL	52.17	85.84	51.53	106.13	51.08	111.63	129.35	16.99	604.71

Source: Tables 3 and 4

Table 9 - 2036 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	56.98	93.61	56.66	116.80	55.74	122.84	140.27		642.90
Chichester	50.03	33.70	28.33	25.58	6.80	19.65	11.92	17.41	193.43
Selsey	0.00	0.00	15.07	0.00	0.00	0.00	1.26	0.51	16.84
East Wittering / Bracklesham	0.46	0.75	6.80	0.00	0.00	0.00	0.00	0.25	8.25
Other Chichester District	1.31	7.68	1.13	0.93	0.00	1.23	1.96	0.44	14.69
Chichester District Total	51.80	42.13	51.33	26.51	6.80	20.88	15.15	18.60	233.20
Havant/Waterlooville	0.34	39.88	0.28	0.00	0.33	0.00	85.42		126.26
Bognor Regis/Littlehampton	0.97	1.97	1.98	69.96	0.00	66.33	0.00		141.21
Portsmouth	2.68	4.12	0.51	9.93	0.00	0.00	25.81		43.04
Other	1.20	5.52	2.55	10.40	48.60	35.62	13.89		117.78
Other Total	5.19	51.49	5.33	90.29	48.94	101.95	125.12		428.30
TOTAL	56.98	93.61	56.66	116.80	55.74	122.84	140.27	18.60	661.50

Source: Tables 3 and 4

Table 10 - Food and Beverage Facilities in Chichester (SQ.M Gross)

Area	Class A3	Class A4	Class A5	Total
Chichester town centre	7,880	5,640	610	14,130
Selsey	900	600	80	1,580
East Wittering / Bracklesham	1,200	150	180	1,530
TOTAL	9,980	6,390	870	17,240

Source: Goad Plan May 2017 and Lichfields' site survey.

Table 11 - Summary of Food and Beverage Expenditure 2018 to 2036 (£M)

Area	2018	2021	2026	2031	2036
Available Expenditure					
Chichester	138.59	146.05	160.65	176.70	193.43
Selsey	11.89	12.57	13.89	15.33	16.84
East Wittering / Bracklesham	5.83	6.16	6.81	7.51	8.25
Other Chichester District	10.63	11.18	12.26	13.45	14.69
Total	166.94	175.97	193.61	212.99	233.20
Benchmark Turnover of Existing Facilities					
Chichester	138.59	142.79	150.07	157.73	165.77
Selsey	11.89	12.25	12.88	13.53	14.22
East Wittering / Bracklesham	5.83	6.00	6.31	6.63	6.97
Other Chichester District	10.63	10.96	11.52	12.10	12.72
Total	166.94	172.00	180.77	189.99	199.68

Source: Table 4

Table 12: Food and Beverage Floorspace Capacity up to 2036

	2018	2021	2026	2031	2036
Surplus/Deficit Expenditure (£m)					
Chichester	0.00	3.27	10.58	18.98	27.65
Selsey	0.00	0.32	1.01	1.80	2.62
East Wittering / Bracklesham	0.00	0.16	0.50	0.88	1.28
Other Chichester District	0.00	0.23	0.75	1.35	1.97
TOTAL	0.00	3.97	12.84	23.00	33.52
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,152	£5,414	£5,690	£5,981
Floorspace Projection (sq.m gross)					
Chichester	0	634	1,955	3,335	4,624
Selsey	0	62	187	316	438
East Wittering / Bracklesham	0	30	92	155	214
Other Chichester District	0	44	138	236	329
TOTAL	0	771	2,371	4,042	5,605

Source: Table 11

Appendix 5: Household Survey Results

Household Survey Structure

NEMS Market Research carried out a telephone survey of 701 households across the study area in January 2018. The study area was split into 6 zones, based on postcode sector boundaries. To provide statistically reliable sub-samples 100 completed interviews were undertaken in each zone. The main aims of the survey were to establish patterns for the following:

- main food and top up grocery shopping;
- non-food shopping, including:
 - clothing and footwear;
 - domestic electrical appliances;
 - other electrical goods (TV, Hi-Fi and computers);
 - furniture, soft furnishing or carpets;
 - DIY/hardware items and garden items;
 - chemist, health and beauty items;
 - other non-food items (e.g. books, CDs, DVDs, toys and gifts); and
- leisure activities.

Appendix 6: Potential Development Sites

CH1. Cattle Market Car Park, Chichester

Evaluation Criteria	Comment
Site Size	Over 2 hectares.
Current Use	Public long stay car park (836 spaces). Public toilets and electricity sub-station.
Sequential Status	Well-connected edge of centre site on eastern fringe of city centre.
Availability	The site is Council owned, but is currently used as one of the town centre's main long stay car parks.
Potential Uses	The site has good road frontage on the Chichester city centre ring road. The site is suitable for retail and leisure uses, with community, cultural, offices and/or residential uses on upper floors. Development could provide active frontages on Market Road and perhaps a new pedestrianised shopping street leading into the site and car parking to the rear. Development located in the northern half of the site could be linked to existing commercial uses on Market Road and East Street. Multi-storey car parking (3 levels) could be provided on the southern half of the site, to maintain or increase the number of public car parking spaces, although this would need to be of high quality design.
Scale of Development	Large scale - over 5,000 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area. Need to re-provide lost car parking spaces and public toilets. The electricity sub-station may need to be relocated. There are several mature trees throughout the site. Part of the site is bordered by walls which may be protected. Residential amenity issues particularly on the southern boundary of the site.
Access	Existing car park access from Market Road. Pedestrian access adjacent to existing retail properties on Market Road.
Overall Development Prospects	Good

CH2. Market Road Car Park, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.1hectares.
Current Use	Public short stay car park (50 spaces).
Sequential Status	Edge of centre site on eastern fringe of city centre.
Availability	The site is Council owned, but is currently used as a small short stay car park.
Potential Uses	The site has road frontage on the Chichester city centre ring road. Potential for secondary town centre uses with offices and/or residential uses on upper floors. Development could provide active frontages on Market Road.
Scale of Development	Small scale – less than 500 sq.m gross at ground floor level.
Development Constraints	Within a sensitive location of the Conservation Area. Need to re-provide lost car parking spaces. It is understood the River Lavant runs under this site which may restrict its development potential.
Access	Existing car park access from Market Road.
Overall Development Prospects	Reasonable

CH3. Kwik Fit, St Pancras, Chichester



Evaluation Criteria	Comment
Site Size	Approx. 0.1hectares.
Current Use	Kwik Fit car serving garage.
Sequential Status	Secondary shopping frontage within city centre.
Availability	In single ownership but availability for development/change of use unclear.
Potential Uses	The site has an extensive road frontage on St. Pancras and a small frontage on East Street. Potential for retail or food/beverage uses with offices residential uses above.
Scale of Development	Small scale – up to 1,000 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area. Need to re-locate Kwik Fit to less central site.
Access	Existing car park access from St. Pancras. Customer access also possible from East Street.
Overall Development Prospects	Good

CH4. New Park Road Car Park, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.15hectares.
Current Use	Public short stay car park (95 spaces).
Sequential Status	Edge of centre site on eastern fringe of city centre.
Availability	The site is Council owned, but is currently used as a small short stay car park.
Potential Uses	The site has limited road frontage, but could be linked to adjacent restaurant uses at Eastgate Square. Potential for restaurant and/or boutique shop uses at ground floor with offices or residential uses on upper floors.
Scale of Development	Small scale – up to 500 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area. Need to re-provide lost car parking spaces on another site. Residential amenity issues will restrict developable area.
Access	Existing car park access from New Park Road. Pedestrian access from Eastgate Square.
Overall Development Prospects	Reasonable

CH5. Northgate Car Park, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 1.5hectares.
Current Use	Public long stay car park (907 spaces).
Sequential Status	Edge of centre site on northern fringe of city centre.
Availability	The site is Council owned, but is currently used as one of the town centre's main long stay car parks.
Potential Uses	The site has road frontage on the Chichester city centre ring road. Potential for large format retail and leisure uses with offices and/or residential uses on upper floors. Multi-storey car parking (3 levels) could be provided to the rear of the site, to serve the proposed development and the theatres. Restaurant/leisure uses could be provided to serve the theatres.
Scale of Development	Large scale – large scale over 5,000 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area but less sensitive than other sites. Need to re-provide lost car parking spaces. There are mature trees and an historic wall on the southern part of the site. Separated from town centre by underpass.
Access	Existing car park access from Market Road.
Overall Development Prospects	Good

CH6. Metro House, Northgate, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.3hectares.
Current Use	1960s office building.
Sequential Status	Edge of centre site on northern fringe of city centre.
Availability	In single ownership but availability for development unclear.
Potential Uses	The site has road frontage on the Chichester city centre ring road. Potential for secondary town centre uses with offices and/or residential uses on upper floors. Development could provide active frontages on Northgate.
Scale of Development	Medium scale – up to 2,000 sq.m gross at ground floor level.
Development Constraints	Need to relocate existing occupiers. Acquisition and demolition may make redevelopment costs prohibitive. Separated from town centre by one-way gyratory. Mature trees and landscaping on site.
Access	Existing car park access from Market Road.
Overall Development Prospects	Reasonable

CH7. Chichester Railway Station

Evaluation Criteria	Comment
Site Size	Approx. 0.7hectares.
Current Use	Railway station, forecourt/drop off car parking, fitness gym, restaurant, barbers and taxi hire outlet.
Sequential Status	Edge of centre site on southern fringe of city centre.
Availability	Owned by Network Rail but parts let to other occupiers. Timing of land assembly unclear.
Potential Uses	<p>The Chichester Southern Gateway Masterplan identifies this area as having potential for “<i>infill and redevelopment subject to maintaining the operational requirements of Network Rail and the train operating company (TOC). Options could include apartments or student accommodation, commercial floor space at ground floor, and additional car parking. This could be accommodated to the north of the existing station buildings making more efficient use of existing surface car parking.</i>”</p> <p>The masterplan proposes high density mixed use development. Commercial uses such as convenience retail, food/beverage outlets would benefit from passing trade through the station and could complement the town centre.</p>
Scale of Development	Medium scale – up to 2,500 sq.m gross at ground floor level.
Development Constraints	Land assembly and availability uncertain. Will require Network Rail’s commitment to redevelop and re-configure the station area. Need to relocate existing occupiers (gym, restaurant and taxi hire etc.).
Access	Existing station access from Southgate.
Overall Development Prospects	Good

CH8. Former Government Offices, Southgate, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.13 hectares.
Current Use	Job Centre Plus and offices. Dated building.
Sequential Status	Well-connected edge of centre site on southern fringe of city centre.
Availability	Department for Works & Pensions PFI agreement. Part vacant. The Chichester Southern Gateway Masterplan identifies this site as a long-term opportunity (10 years +)
Potential Uses	Frontage on to Southgate. The Chichester Southern Gateway Masterplan identifies this area as having potential for active ground floor retail/A2 frontage, with residential development above.
Scale of Development	Small scale – up to 1,000 sq.m gross at ground floor level.
Development Constraints	Land assembly - availability in short term uncertain.
Access	Existing access from Avenue De Chartres. Pedestrian access from Southgate.
Overall Development Prospects	Good

CH9. Law Courts and Bus Station, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.7hectares.
Current Use	Bus station including ground floor shop units. Crown and Magistrates Courts.
Sequential Status	Edge of centre site on southern fringe of city centre.
Availability	Chichester Southern Gateway Masterplan suggests site will become available by the end of 2017 and surplus to requirements – a short to medium term opportunity (2-5 years). The bus station is Council owned but leased to Stagecoach.
Potential Uses	The Chichester Southern Gateway Masterplan identifies this area as a redevelopment opportunity for commercial uses at ground floor, particularly food and beverage and leisure related uses. Other uses could include hotel, residential, student accommodation or community uses. Active frontages on Southgate.
Scale of Development	Large scale – up to 5,000 sq.m gross at ground floor level.
Development Constraints	Relocation of bus station stops required. Conservation area and TPO trees. Local listed buildings.
Access	Service/car park access off Basin Road. Pedestrian access on Southgate.
Overall Development Prospects	Good

CH10. Basin Road Car Park and Bus Depot, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.8hectares.
Current Use	Bus Depot and long stay car park (115 spaces).
Sequential Status	Edge of centre site on southern fringe of town centre.
Availability	The site is Council owned and the depot is leased to Stagecoach. Chichester Southern Gateway Masterplan suggests the site is a short to medium term opportunity (2-5 years) and refers to the possible use of CPO powers.
Potential Uses	The Chichester Southern Gateway Masterplan identifies the site as suitable for residential student accommodation, starter or retirement homes. Alternatively, the site has potential for large format retail and leisure uses with offices and/or residential uses on upper floors.
Scale of Development	Medium scale – up to 3,000 sq.m gross at ground floor level with on-site car parking.
Development Constraints	Relocation of bus depot required and possible compensation to Stagecoach. Acquisition of residential property. Need to replace car parking. Local listed depot building.
Access	Existing access from Basin Road.
Overall Development Prospects	Reasonable

CH11. Little London/St. Martins Car Park, Chichester



Evaluation Criteria	Comment
Site Size	Approx. 0.25hectares.
Current Use	Public short stay car park (81 spaces).
Sequential Status	City centre site – behind East Street and St. Martin’s Street.
Availability	The site is Council owned, but is currently used as a small short stay car park.
Potential Uses	The site has limited road frontage, but could be linked to St. Martin’s Street. Potential for restaurant and/or boutique shop uses at ground floor with offices or residential uses on upper floors.
Scale of Development	Small scale – up to 1,000 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area. Need to re-provide lost car parking spaces on another site.
Access	Existing car park access from Little London. Pedestrian access from St. Martin’s Street.
Overall Development Prospects	Reasonable

CH12. Baffins Lane Car Park, Chichester



Evaluation Criteria	Comment
Site Size	Approx. 0.15hectares.
Current Use	Public short stay car park (86 spaces).
Sequential Status	City centre site – behind East Street and N. Pallant.
Availability	The site is Council owned, but is currently used as a small short stay car park.
Potential Uses	The site has limited road frontage, but could be linked to East Street. Potential for restaurant and/or boutique shop uses at ground floor with offices or residential uses on upper floors.
Scale of Development	Small scale – up to 500 sq.m gross at ground floor level.
Development Constraints	Within Conservation Area. Need to re-provide lost car parking spaces on another site.
Access	Existing car park access from Baffin’s Lane and E. Pallant.
Overall Development Prospects	Reasonable

CH13. Coach Park, Chichester

Evaluation Criteria	Comment
Site Size	Approx. 0.15hectares.
Current Use	Coach park
Sequential Status	Edge of centre site – on south west fringe of city centre.
Availability	Appears to be in single ownership.
Potential Uses	The site has good road frontage, and is adjacent to the Waitrose store. Potential for large format retail/leisure or drive-thru use.
Scale of Development	Small scale – up to 500 sq.m gross at ground floor level.
Development Constraints	Need to re-provide coach car parking spaces on another site.
Access	Existing access from Penzance Road.
Overall Development Prospects	Good

CH14. Canal Basin - Royal Mail, Chichester



Evaluation Criteria	Comment
Site Size	Approx. 0.5 hectares.
Current Use	Royal Mail delivery
Sequential Status	Edge of centre site – on southern fringe of city centre.
Availability	Appears to be in single ownership.
Potential Uses	The site has road frontage on Stockbridge Road. Potential for large format retail and leisure uses with offices and/or residential uses on upper floors. Restaurant/leisure uses could benefit from canal basin location.
Scale of Development	Medium scale – up to 2,000 sq.m gross at ground floor level.
Development Constraints	Need to re-provide Royal Mail. Poorly linked to city centre.
Access	Access from Stockbridge Road, Canal Wharf and or Basin Road.
Overall Development Prospects	Reasonable

EW1. Former Royal Oak Public House, East Wittering

Evaluation Criteria	Comment
Site Size	Approx. 0.25hectares.
Current Use	Vacant public house and shop unit and associated garden and car park.
Sequential Status	Part of existing retail frontage within town centre.
Availability	The site is vacant and it is the subject of a current application for the retention of the former Royal Oak public house and demolition of dog grooming business and the erection of 9 no. dwellings.
Potential Uses	Frontage on Cakeham Road and main road Stocks Lane. Potential to refurbish and re-use the public house and develop the car park garden area to provide retail units at ground floor level with residential units above.
Scale of Development	Medium scale – up to 1,500 sq.m gross at ground floor level. But current application proposals only include the retention of the public house (about 400 sq.m)
Development Constraints	Availability for commercial development unlikely due to current residential led proposals. Residential amenity issues to the rear of the site.
Access	Existing access from Cakeham Road.
Overall Development Prospects	Good (but potentially unavailable)

SEL1. BT Premises and Royal Mail Premises, Selsey

Evaluation Criteria	Comment
Site Size	Approx. 0.2hectares.
Current Use	BT and Royal Mail premises.
Sequential Status	Edge of centre site but immediately adjacent to existing shop frontages.
Availability	Presumably owned by BT and Royal Mail, but availability for development unclear.
Potential Uses	The site has an extensive road frontage on Hillfield Road and forms a possible natural extension to the high street in Selsey. Potential for retail or leisure uses with residential uses on upper floors.
Scale of Development	Small scale – up to 1,000 sq.m gross at ground floor level.
Development Constraints	Land acquisition and availability. Possible need to relocate BT and Royal Mail uses. Residential amenity issues to the rear of the site.
Access	Service access via Latham Road. Customer access via Hillfield Road.
Overall Development Prospects	Reasonable

SEL2. Selsey Cars, Selsey

Evaluation Criteria	Comment
Site Size	Approx. 500 sq.m.
Current Use	Former car sales garage.
Sequential Status	Within centre and in a prominent position on the High Street.
Availability	Site appears under-utilised. Presumably in single ownership but availability for development unclear.
Potential Uses	The site has an extensive road frontage on the high Street and forms a possible natural extension to the high street in Selsey. Potential for retail or leisure uses with residential uses on upper floors.
Scale of Development	Small scale – up to 300 sq.m gross at ground floor level.
Development Constraints	Availability for development unclear.
Access	Service and customer access via the High Street.
Overall Development Prospects	Good

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