

Appendix [6]

Bognor Regis Town Centre: Health check

1. Introduction

- 1.1 The ADRS notes that Bognor Regis is the largest settlement and retail centre in the district and is located approximately 8 miles (12.8km) south east of Chichester and 16 miles (25km) east of Portsmouth. The study acknowledges that the town is a popular tourist and holiday destination, which includes a large Butlins resort. In retail terms, the centre is located to the south of the town towards the seafront with the primary retail frontage at London Road (pedestrianised) together with The Arcade (to the south of High Street). The secondary retail frontage is focused along High Street (to the junction with Lyon Street and Queensway), the northern section of London Road, and Queensway. In addition, Lennox Street and Norfolk Street form part of the wider town centre and provide linkages to The Esplanade. A town market operates at Place St. Maur near the seafront every Saturday (March-December) together with Tuesday (April-October) and Thursday (May-October).
- 1.2 The FOCUS report for the town is attached as **Appendix [7]** along with information on the town's catchment area. This sets out the demographic and socio-economic profile of the town and recognises the dominance of the two main out of centre retail parks: Arun Retail Park and the Bognor Regis Retail Park. The Management Horizons Shopping Index indicates that the centre is defined as Major District Centre. Its rank within the index has fallen 21 places since 2003 from 320 to 350.
- 1.3 The urban area according to Focus contained in excess of 62,000 residents in 2001 representing 44% of the total within the District.

Table A: Resident population within Bognor Regis 2001

	Urban Area	District	GB
Population			
Resident 2001	62,141.0	140,759	57,103,927
Resident 1991	56,667	129,357	54,888,844

- 1.4 In terms of the socio-economic profile the urban area is dominated by retired people as indicated in Table B below.

Table B: Socio-economic profile of Bognor Regis

Mosaic Consumer Classifications	Urban Area	GB
Symbols of Success	4.47	9.70
Happy Families	8.30	11.64
Suburban Comfort	14.73	14.69
Ties of Community	16.36	16.36
Urban Intelligence	1.08	7.35
Welfare Borderline	1.34	6.16
Municipal Dependency	0.98	6.73
Blue Collar Enterprise	7.96	11.08
Twilight Subsistence	4.39	3.26
Grey Perspectives	38.21	7.36
Rural Isolation	1.07	5.32
Unclassified	1.11	0.33

2. Diversity of uses and retailer representation

1.5 Table 1 of the ADRS summarises the floorspace within the centre as follows:

Table 1 – Diversity of Uses: Retail Composition of Bognor Regis

	Number of units	%	UK Average %
Convenience	16	6.4	9
Comparison	121	48.2	41
Retail Services/Others	89	35	35
Vacant	17	6.8	14
Total	251	100	100

Source: Goad (2007), UK average based on Goad (February 2012)

- 1.6 The Goad town centre identified a total floorspace of 121,000 sq. m in the centre (2007). In retail terms, the Goad report confirms 251 units. Of this total, 16 units (6.4% of total composition) were identified to be in convenience use (below the national average of 9%), with the main provision focused at Morrisons (Bedford Street) which is located behind London Road and Iceland (corner of High Street/Queensway). A Tesco Express is located at London Road, opposite the railway station. The ADRS concluded that the choice and quality of supermarkets in Bognor Regis centre was generally considered to be good/very good by 60% of respondents to the household survey (Bognor Regis zone).
- 1.5 The level of comparison retail uses accounts for 48.2% of total units in the centre (121 units). This is higher than the national average (41%). In total, comparison floorspace accounts for approximately 50,000 sq. m. of floorspace. Provision is concentrated at London Road although the majority of units are relatively small with the three largest units occupied by Boots, Wilkinsons and New Look respectively.

- 1.6 Overall the level of retailer representation is considered to be good. In retailer representation terms, the town centre supports a good level of multiple outlets. The strength of the multiplier offer in Bognor Regis is confirmed by the presence of major retailers. Of the 31 major retailers measured by Goad, 8 are represented in the centre, including Boots, WH Smith, Carphone Warehouse, Wilkinsons, New Look, Phones 4 U, Dorothy Perkins and Superdrug, focused along London Road. Other national occupiers include M & Co, Clarks and Poundland.
- 1.7 The retail study acknowledged that there was a shortage of modern units within the centre which was likely to limit retailer representation within the centre.

3. Retailer requirements

- 1.8 The most recent Focus report states that there are 9 retailers with a requirement to locate in Bognor Regis including a requirement by Aldi for a supermarket. A copy of this is attached as **Appendix [8]**. This is an improvement to the six recorded retailers interested at March 2013 as set out in the ADRS. Paragraph 4.6 of the study also advises:

"Given recent economic conditions, it is unsurprising that retailer requirements have fallen. It should however be noted that Focus data in relation to retailer interest needs to be interpreted with caution in that not all retailers will register interest, whilst others register general interest across a wide number of centres. It is however an industry accepted source of information and the only source which allows comparison between centres over time."

4. Rental levels

- 1.9 The most up to date information on rental levels is set out in paragraph 4.16 of the retail study:

"Local agents active in the town confirm the prime area to be focused on London Road with prime Zone A rents at £30/sq. ft. This represents a fall over recent years which according to Focus (as informed by Colliers CRE) had been relatively stable at £60/sq. ft over the period 2004 - 2008. It would appear that Bognor Regis has experienced a marked reduction in Prime Zone A rents over recent years although this is not specific to Bognor Regis. Local agents attribute the combination of fragile market sentiment, tough economic conditions, and downwards pressures (static at best) on rental growth. It further emphasises the significant variations in the retail market at the national level between small and medium sized towns, and the larger centres and shopping malls. In terms of secondary locations, we are advised that rents in the Queensway are approximately £20/sq. ft."

- 1.10 Paragraph 4.17 of the retail study notes however that conditions within the centre are relatively stable with local agents. There is demand from larger retailer but the competition from Chichester is a disadvantage along with the lack of suitable, modern accommodation within the town.

5. Accessibility

- 1.11 The town centre is highly accessible and the range of car park is judged to be good. It includes three short stay car parks (Regis Centre – 175 spaces; Fitzleet – 343 spaces; Hothamton – 201 spaces) together with two long stay car parks (London Road and Lyon Street – 98 and 61 spaces respectively).

6. Environmental quality

- 1.12 The town centre environment and wider public realm is considered of a generally good standard particularly along the pedestrianised main shopping street whilst the overall environment is considered safe and clean. Our observations of the centre confirm a broadly well maintained centre with good levels of street furniture including seating, lighting and litter bins. The retail study noted that there was scope for improvement in the public realm. The attitudinal responses to the household survey in which approximately 50% of respondents from the Bognor zone considered the quality of the environment of the centre to be good/very good, a quarter considered it to be poor
- 1.13 Paragraph 4.25 of the ADRS noted that:

“The results of the 2012 NEMS Household Survey confirm a general level of satisfaction with the town centre. Of those respondents from the Bognor Regis zone, the main specific issues which attracted more negative than positive feedback related to the range and choice of the non food shops; the range and choice of leisure/entertainment facilities; quality of the environment, and the quality of the evening entertainment. The improvement in the range of shops and leisure facilities were identified as the key factors in encouraging more visits to the town centre.”

7. Out of centre provision

- 1.14 Out of centre food shopping provision is dominated by the Tesco store at Shripney Road and the recently opened Sainsbury’s store on the LEC site. Both of these stores provide a range of comparison goods including fashion items. Lidl operate a discount food store on the Peel Retail Park
- 1.15 The focus for retail warehouse provision is concentrated at Arun Retail Park on the A29 Shripney Road. Occupiers include Carpetright, B&Q, Kwik Fit, Pets At Home, Pizza Hut, Burger King and a vacant unit (former Comet). In addition, the Peel Retail Park further along the A29 Shripney Road at the junction with Rowan Road, supports various occupiers including Matalan, Dreams Beds, Bensons/Ponden Mill, Fitness First, Halfords, KFC and Lidl.

8. Overall conclusions

- 1.16 In terms of its health overall the ADRS concluded that:

“Bognor Regis represents the largest retail centre of the district and appears to have performed resiliently over recent years notwithstanding

the difficult economic climate. The mix of retail uses is reasonable and orientated towards comparison and service uses although the absence of modern floorspace, including an anchor store and higher quality fashion/clothing retailers remains an underlying weakness of the retail offer. An equally important weakness is the limited range and choice of leisure and entertainment facilities, particularly mid to upper market food and drink uses which is more compatible with the dual role of Bognor Regis as a tourist destination. In order for Bognor Regis to develop and enhance its role as a destination underpinned by retail and leisure uses, it will be important for the Council to promote Bognor Regis as a location for retail and leisure uses particularly where there is evidence that the level of retailer requirements for the town has declined significantly over recent years. This will require support for new investment and the ability to provide opportunities for new occupiers, including the availability of suitable sites such as the Regis Centre and Hothampton that can support such uses."