Horsham District Council

Retail Needs Study

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PLANS

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1. EXECUTIVE SUMMARY

Background / Key Study Outputs

1.1 GVA Grimley was instructed by Horsham District Council to undertake the Horsham Retail Needs Study to inform policy and development control decisions in the District. The District is set to experience a high level of housing growth and this Study is required to plan for and meet future need in the District, taking on board the level of growth envisaged.

1.2 The Council is currently in the process of reviewing its Core Strategy (adopted in 2007) which sets out the future development strategy for the District. The Core Strategy is one of a portfolio of documents which makes up the District's Local Development Framework (LDF). The purpose of this Study is to produce up-to-date evidence to support the realisation of the development strategy and inform ongoing work on the Council's LDF. This information will also be at the Council's disposal to assist in the determination of relevant planning applications.

1.3 Our work draws on a bespoke household survey focusing on retail and town centre issues in Horsham and the wider sub-region. Supplementary analysis included up-to-date town centre health checks of Horsham town centre and the village centres of Billingshurst and Southwater which are implicated by planned strategic growth. The report reviewed the current status of retail activities in the District, local shopping patterns and flows of expenditure, and the potential for growth and change to accommodate need arising up to 2026.

Sub-Regional Context

1.4 According to the 2010 household survey, Horsham has a market share of 24% across the survey area (illustrated in the report). Zones 3, 6-8 and 10-13 broadly correspond to the District's boundary, and analysis demonstrates that Horsham retains 56% of comparison goods expenditure generated within these zones. This is a strong level of trade retention and reflects the strong performance of Horsham town centre, particularly given the network of strong centres in the sub-region.

1.5 The survey identified Crawley as the main competing centre for Horsham, capturing £206.1m from the survey area which equates to a market share of 22% (almost equivalent to Horsham's). This is not unsurprising given its position within the survey area. Guildford and Worthing, and to a lesser extent Brighton, exert some influence over the District, albeit marginal. These centres have a superior retail offer and increasingly mobile shoppers have led to a continued influence on shopping patterns in Horsham's catchment area. These centres have a collective market share of 14% which is minimal in quantitative terms and is generally diluted across the breadth of survey area, providing reassurance of Horsham's strength in the catchment area. The remaining 41% is accounted for by other centres and out of centre comparison provision both within and beyond the survey area.

1.6 There are several comparison led development schemes in the pipeline in the key competing centres which have potential to influence shopping patterns within Horsham. It will therefore be important for Horsham to build on its strengths to ensure it maintains and where possible, enhances its market share, to offset planned growth elsewhere in the sub-region.

Quantitative Capacity Forecasts

1.7 Overall, the population of the Survey Area is forecast to grow by 13%. This is the baseline level of population growth which does not take into account the envisaged level of growth planned within the District's strategic growth areas. Under the baseline growth scenario, convenience goods expenditure is forecast to grow by 32% and comparison goods expenditure is forecast to grow by 71% over the period to 2026.

1.8 In terms of convenience goods, our baseline analysis has identified global capacity to support 9,234 sqm net additional convenience goods floorspace by 2015. This is broadly equivalent to the size of two Horsham Sainsbury's stores. By virtue of growth in population and expenditure we forecasts that this capacity will increase to 10,231 sqm net by 2020, 11,401 sqm net by 2025 and 11,604 sqm net by 2026, across the District (broadly equivalent to the size of two and a half Horsham Sainsbury's stores). The estimated amount of residual spending to support this level of new floorspace reflects high levels of trade retention across the District.

1.9 In terms of comparison goods, the analysis has identified surplus residual expenditure to support an additional 3,236 sqm net comparison retail floorspace by 2015. This is broadly equivalent to the size of two Horsham TK Maxx units. Our forecasts indicate that capacity will grow to 13,565 sqm net by 2020, 26,186 sqm net by 2025 and 28,927 sqm net by 2026 (broadly equivalent to the size of the Swan Walk shopping centre). The majority of this capacity is being generated by the strong performance of Horsham town centre.

1.10 There is evident capacity in quantitative terms to support additional retail floorspace in the District; however our qualitative assessment has identified limited physical opportunities for expansion in Horsham, Billingshurst and Southwater. Notwithstanding this, national policy (PPS4) requires the Council to identify an appropriate range of sites to accommodate identified need. An apparent lack of sites of the right size and in the right place should not be a reason for the Council to avoid planning to meet the identified need for development. PPS4 encourages the Council to proactively plan to promote their town centres and advocates the town centre's first approach. Our study therefore presents a selection of options for the Council to consider towards planning to meet identified need. Independent of this, it remains a requirement for <u>all</u> planning applications for main town centre uses to satisfy the relevant key tests in PPS4.

Horsham town centre

1.11 Horsham appears to be a healthy town centre and is performing well in respect of the PPS4 health check indicators. The town centre's role and function is consistent with its position in the regional hierarchy as a Secondary Regional Centre at a level below Primary Regional Centres such as Crawley, Worthing, Guildford and Brighton. Notwithstanding its secondary regional status, the centre is currently performing well against competing centres in the sub-region. This is considered largely as a result of its unique characteristics, strong mix of retail and other town centre uses and niche offer which clearly differentiates it from other typical 'clone' towns.

1.12 The centre has a particular strength in terms of its comparison shopping offer which includes several higher-order retailers alongside some more boutique and specialist retailers, creating a diverse retail offer. Horsham also benefits from a wealth of historical architecture which has been well-preserved and adds to the overall high quality environment.

1.13 The centre has below average number of vacant units and there is also recent evidence of new operators moving into the centre including restaurant multiples Carluccio's and Ask. Prime yields have also remained consistently strong which is a further indication of on-going investor confidence in the centre. Whilst in the centre has experienced a marginal downturn in terms of Prime A rents, this is consistent with national trends and the recent recession and not specifically isolated to Horsham.

1.14 The number of retailer requirements for Horsham has steadily declined since 2005, although the centre has actually improved its rank position, reflecting the strength and appeal of Horsham comparable to other centres (e.g. Crawley) which have declined in ranking terms. In 2009 Horsham was ranked 66th compared to 137th in 2007 – a significant improvement. Horsham's rank in 2009 is less than Guildford's rank in 7th position, but better than both Worthing and Crawley which are ranked 88th and 94th respectively.

1.15 The main focus of retail activity is along West Street which facilitates links to the Swan Walk shopping centre to the north and the Forum to the south. Other key areas of activity include Carfax which is predominantly service-orientated; Piries Place which accommodates smaller more specialist retailers, food and drink outlets and the Waitrose supermarket; and East Street where there is a budding concentration of restaurants and eateries.

1.16 There is further scope to enhance these areas as distinct, complementary quarters of activity and to facilitate movement between them through clear and well-placed signage and effective marketing. The Council should continue to be proactive in maintaining and improving the quality of the environment through effective town centre management. There is also scope to enhance Springfield Court within the Swan Walk shopping centre which has evidently declined since the previous retail assessments in 2003 and 2005.

1.17 Our quantitative analysis demonstrates that the centre is performing very strongly in terms of both convenience and comparison goods shopping. The centre dominates the northern part of the District with a strong convenience goods market share in its location zone, Zone 8 and adjacent zones 3, 7 and 10. Reflecting limited, higher order comparison retail provision elsewhere in the District, Horsham town centre has a strong influence in terms of comparison goods shopping. The centre has over 50% market share in each of Zones 3, 6, 7, 8 and 10.

1.18 Our quantitative assessment identifies capacity to support additional retail floorspace in Horsham over the plan period. However, there appear to be few opportunities to expand or redevelop existing retail sites in Horsham town centre given the physical composition of existing retail areas and historic nature of many buildings and the physical constraints of the surrounding road network (Albion Way). National policy guidance encourages a 'centres first' sequential approach to planning for new retail development. On this basis, identified capacity should be directed in and on the edge of Horsham town centre and we have identified two areas which may warrant further consideration as potential opportunity areas.

- **Swan Walk Shopping Centre** occupies a prime position within the primary shopping frontage with linkages to East Street and Carfax. Our assessment demonstrates that part of the shopping centre is not currently performing as well as it should be with an increasing number of vacant units and low levels of pedestrian footfall in parts. The shopping centre was originally constructed in the 1970s and represents a more modern architectural component which is not constrained, in planning terms, like other historic parts of the centre. We therefore consider there is an opportunity to improve the use of the land either through the comprehensive redevelopment of the shopping centre and brownfield land to the rear (including the car park) or through internal alterations/reconfiguration of units seeking to create new retail accommodation that would better suit modern retailer requirements.
- **Land to the east of Worthing Road, south of Bishopric and including the Lifestyle Ford, site (Policy AL 2) and Albion Way**. Part of this area includes a site currently allocated as a development site for residential and commercial uses and open space. The remainder of the area comprises a selection of sites within a variety of uses and numerous land ownerships. Subject to improving connections and integration with the centre and overcoming obvious constraints, this area could be considered an appropriate location to accommodate development to meet identified need.

Out-of-Centre Retail Provision

1.19 The main out-of-centre retail provision in the District is limited to three retail parks and a single standalone retail warehouse unit. There are large out-of-centre supermarkets; Tesco, Broadbridge Heath and Sainsbury's, Pulborough which contribute towards the overall convenience shopping provision in the District.

1.20 The household survey indicates that Broadbridge Heath is the most popular destination for DIY and decorating goods, drawing 23% from the survey area. It is generally less popular in terms of the other comparison goods categories, although this is a reflection on the type of retailers represented. Reflecting the type of goods on offer, Tan Bridge Retail Park only features in the household telephone survey under the comparison retail categories for domestic appliances and electrical goods. The Foundry Retail Park does not feature very highly on the survey results, although this is again a reflection on its more limited retail offer.

Leisure

1.21 Our broad assessment has demonstrated that whilst the overall proportion of leisure uses in Horsham town centre is below average, there is a good range of different leisure activities on offer in the centre. These uses are broadly distributed across the centre although there is a clear focus on East Street and around Market Place, where there are several restaurants and one or two drinking establishments. It is evident from the household survey that the local catchment largely choose Horsham for visiting restaurants and pubs. The influence of the centre's restaurant offer extends beyond the immediate catchment and, in parts, beyond the District boundary attracting 16% of visitors from Zone 2 and 11% from Zone 5.

1.22 Horsham is clearly performing well as a restaurant destination at the current time and the Council should seek to maintain and enhance the role of East Street and the surrounds as a distinct restaurant 'quarter'. Nurturing such uses is considered key in encouraging a differentiated offer and quality provision compared to competing destinations such as Crawley.

1.23 Crawley is the most popular destination for cinema and bowling, both of which are located at the Crawley Leisure Park. It is evident that residents within the survey area are prepared to travel a further distance to use these facilities, despite closer provision in Horsham. Unless there is a substantial improvement in Horsham's facilities, it is unlikely that these patterns of leisure use will change over the plan period.

Billingshurst

1.24 Our assessment demonstrates that Billingshurst is currently functioning reasonably well as a village centre meeting the local shopping and service needs of the resident catchment population. It is evident that the centre has experienced some decline in retail provision over recent years and there has been a significant increase in vacant units since 2007.

1.25 Consistent with its scale and location, Billingshurst is predominantly performing a local top-up convenience shopping role, led by the Budgens as the main foodstore. The Budgens is performing well although the store serves a rather limited, local catchment area. The centre has a more limited role in terms of main food shopping and it is evident from the results of the household survey that residents in

Zone 6 generally travel to Tesco, Broadbridge Heath (29%) or Sainsbury's, Pulborough (22%) for this purpose. These stores are both within approximately 10-12 minutes drive of Billingshurst.

1.26 Overall, there is a substantial level of leakage of convenience goods expenditure from Billingshurst's core catchment which suggests that localised needs of the surrounding residential area are not being met sufficiently. Notwithstanding this, our assessment demonstrates that, despite evident decline, Billingshurst continues to offer a good, basic range of local shopping and service facilities which is contributing towards fulfilling the needs of the immediate resident population.

1.27 Based on the performance of existing provision, we have identified marginal capacity to support additional convenience goods floorspace in Billingshurst in the region of 157 sqm net by 2015; forecast to grow to 220 sqm net by 2026. This is a low level of capacity which reflects the centre's low market share and high leakage of spend from the area. However, there are clear deficiencies in existing provision and a qualitative argument to support additional convenience goods floorspace in the centre. Enhanced provision, of an appropriate scale and format, would have the potential to capture those currently travelling further afield for their main-food shopping. A larger foodstore could be supported through the claw back of trade to the area which would also counteract less sustainable shopping and travel patterns.

1.28 There appear to be few opportunities to expand or redevelop existing retail sites in Billingshurst given the historic nature of many of the buildings and development constraints within a conservation area. However, PPS4 states that LPAs should use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres. In the case of Billingshurst we consider there is opportunity to enhance the centre utilising land to the east of High Street and at Jengers Mead.

1.29 There is potential for land to the east of Billingshurst to deliver in the region of 1,750 dwellings which would result in approximately 4,025 additional people living in the area. Our assessment highlights that 4,025 additional residents would, theoretically, have potential to generate approximately £8m of convenience expenditure in 2015. On the assumption that 100% of this expenditure is retained in Billingshurst, the new population could support between 804 and 2,010 sqm net additional convenience floorspace by 2015 (depending on the store format).

1.30 In addition to the identified baseline capacity, this suggests possible scope for between 961 sqm net and 2,402 sqm net of convenience goods floorspace in Billingshurst by 2015. The level of capacity would increase further if the centre is able to claw back trade leakage and increase its market share. In the event that this level of population growth does come forward in the Billingshurst area within the lifetime of the plan, the Council will need to consider how best to meet identified need for additional convenience goods floorspace.

1.31 Taking into consideration the existing performance of the centre and potential significant growth, there are a series of options for the Council to consider in planning for the future of Billingshurst and meeting the needs of the whole community. In short these are:

- Option 1: Do Nothing
- Option 2: Promote existing centre and provide consumer choice
- Option 3: New centre in planned growth area
- Option 4: Promote Billingshurst and plan for a new centre

Southwater

1.32 Our assessment demonstrates that Southwater is currently performing well as a village centre. It has a good basic range of shops and services on offer at Lintot Square, no vacant units and the quality of the environment is high. The centre is evidently popular and the only obvious constraints relate to parking and accessibility by public transport. The survey indicates that 77% of visitors travel by car/van however we understand that parking congestion is a common, everyday occurrence. Whilst this demonstrates the popularity of the centre it may also act as a deterrent and result in potential visitors travelling elsewhere to fulfil their shopping needs.

1.33 Southwater is mainly performing a local top-up food shopping role led by the Co-op in Lintot Square. The Co-op is performing well but serves a limited, local catchment and it is evident that the majority of residents in this area are choosing to travel further afield to undertake their main food shopping in larger foodstores (e.g. Tesco, Broadbridge Heath and Sainsbury's, Horsham) where there is a greater choice of goods on offer.

1.34 Based on the performance of existing provision, we have identified marginal capacity to support additional convenience goods floorspace in Southwater. Taking into consideration the amount of convenience goods expenditure currently leaking to other foodstore destinations in the District, there could also be a qualitative argument to support additional convenience goods floorspace in the centre on the basis of clawback. However, the centre is physically constrained and there are no clear opportunities to expand or redevelop existing retail sites in the centre to meet identified need.

1.35 There is potential for land to the west of Southwater to deliver in the region of 2,750 dwellings which would result in approximately 6,325 additional people living in the area. Taking into account forecast growth in expenditure, we estimate that this population would generate approximately £12.4m of convenience expenditure in 2015. On the assumption that 100% of this expenditure is retained in Southwater, the new population could support between 1,243 sqm net and 3,107 sqm net of convenience floorspace by 2015 (depending on the store format). In addition to the identified baseline capacity, this suggests possible scope for between 1,331 sqm net and 3,327 sqm net of convenience goods floorspace by 2015.

1.36 There is clearly quantitative capacity to support new convenience floorspace in Southwater. Taking into consideration physical constraints and limited scope for expansion at the existing centre, there is a plausible case for the Council to consider allocating a new local centre, of a similar scale or perhaps larger than Southwater, as part of the wider plan for the strategic growth area. The Council should consider scale and location and thoroughly assess the impact of a new local centre on Southwater and other existing centres in the District.

Growth Area Recommendations

1.37 It is evident from our analysis that there is capacity for additional retail development both globally and locally in Horsham, Billingshurst and Southwater. Our review of existing shopping patterns shows that there is a high level of leakage of expenditure from both Billingshurst and Southwater to other shopping destinations within the District and beyond and our qualitative assessment suggests that existing provision is not adequate to fulfil the needs of the centres' local catchments.

1.38 On the basis of identified shopping patterns and expenditure flows and the performance of existing provision, there is evidently a need arising for new retail provision to improve the ability of Billingshurst and Southwater to meet localised needs. Plans for major new housing-led development at the strategic growth areas will create additional need on top of this which would require the provision of enhanced/new retail facilities. Our study concludes that there is an existing and future need (alongside housing growth) for additional retail facilities in Billingshurst and Southwater. In this context, PPS4 directs local authorities to plan for growth and allocate new centres if deemed necessary. In accordance with PPS4, the Council should identify the appropriate scale of development; apply the sequential approach to site selection; and assess the impact of sites on existing centres.

1. INTRODUCTION

1.1 In February 2010, GVA Grimley was instructed by Horsham District Council to undertake the Horsham Retail Needs Study to inform retail planning in the District in accordance with guidance set out in PPS4: 'Planning for Sustainable Economic Growth' (December 2009). This study provides a robust and sound evidence base to inform the Council's Review of the adopted Local Development Framework Core Strategy and to assist in reaching conclusions on shorter term proposals for retail and leisure development.

1.2 It is evident from the Council's Brief that there is a clear requirement to identify a future retail strategy for Horsham town centre and also for Billingshurst and Southwater. More specifically there is a need to identify the appropriate scale and location for retail growth within the District, alongside consideration of the potential for new centres in areas of strategic growth.

1.3 A key output of this study will be the analysis of change in the District since the previous studies undertaken in 2003 and 2005; the strengths and weaknesses, and opportunities and threats to the key centres; and the extent of the impact of out-of-centre development at Broadbridge Heath on the network of town centres. It is clear from the Brief that the Study should explore the scope for additional development up to 2026, either within or outside existing centres, and particularly in relation to proposed retail development/growth areas and the requirements for ancillary retail services.

1.4 The scope of the study therefore is to provide up to date advice on the need and capacity for new retail development in the District to 2026, identify qualitative deficiencies in existing provision, and advise the Council on how to meet any identified need. As per the Council's Brief, we have focused our study on the main centre of Horsham, whilst also considering Billingshurst and Southwater village centres. We have undertaken a thorough audit of the current status of retail activities in the District and provide detailed information on the likely future demand for retail floorspace up to 2026. This is accompanied by suggestions on potentially suitable development sites that would be able to accommodate any identified need.

1.5 Our approach draws on the recommendations of the Good Practice Guidance on Need, Impact and the Sequential Approach, produced by GVA Grimley in conjunction with the DCLG, to accompany PPS4. We have adopted a transparent approach, where the key steps of our analysis, data inputs and assumptions are clearly set out and justified. In accordance with the Good Practice Guidance, our approach is also underpinned by the use of an up-to-date household telephone survey to establish current shopping patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing.

Structure

1.6 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and health check assessments. The report is structured as follows:-

- **Section 2** summarises the national, regional and local planning policies relevant to retail planning in the District;
- In **Section 3**, we consider national trends in the retail and leisure sector, and in particular the implications of the recession and more cautious economic outlook specifically in relation to previous estimates of population and expenditure growth;
- **Section 4** reviews the sub regional context and in particular the influence of competing centres in the wider sub region, and potential changes in influence in the future.
- **Section 5** presents our qualitative assessment of the role and performance of Horsham, Billingshurst and Southwater in accordance with the key health check indicators outlined in PPS4. We also provide an overview of out-of-centre convenience and comparison retailing in the District;
- **Section 6** sets out our baseline capacity projections for additional convenience and comparison goods floorspace in the District, taking account of recent/committed developments and current economic conditions up to 2026;
- Finally **Section 7** draws the analysis together and sets out the conclusions and recommendations in respect of the key policy considerations, the current health and composition of the network of centres and the need and opportunities for future floorspace.

2. POLICY FRAMEWORK

2.1 This section sets out the key points of relevance from the national, regional and local policy framework, focusing specifically on town centre strategy policy formulation and the management of growth and change.

PPS4: Planning for Sustainable Economic Growth (December 2009)

2.2 The central message of PPS4 is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:

- Focussing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
- Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).

2.3 The statement advises that local planning authorities (LPAs) should plan positively for growth and development by assessing the need for further main town centre uses and ensure there is capacity to accommodate them (taking account of the role of centres in the hierarchy); and to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.

2.4 In assessing quantitative need for retail and leisure development LPAs should have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.

2.5 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over concentration of growth in centres.

2.6 Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation. The need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre, or any significant change in the role or function of centres should be considered at the regional level.

2.7 In addition to defining the extent of the primary shopping area for their centres, LPAs are encouraged to distinguish between primary and secondary frontages (defined in Annex B). Having regard to the need to encourage diversification of uses in town centres as a whole, PPS4 states that primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for a diversity of uses. Where frontages are identified, the appropriate local development documents should include policies that make clear which uses will be permitted in such locations.

2.8 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:

- supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
- planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
- supporting shops, services and other important small scale economic uses in local centres and villages;
- identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
- retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement;
- taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.

2.9 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.

2.10 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in Policy EC16 which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.

2.11 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in Policy EC16. Assessments of impact should focus on the first 5 years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.

2.12 Policy EC17.1 directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

Good Practice Guide: Need, Impact and the Sequential Approach (December 2009)

2.13 The Good Practice Guide is a government document published alongside PPS4. It does not constitute a statement of Government policy, but forms guidance to support the interpretation of town centre policies set out in PPS4.

2.14 Of most relevance to this Study is the advice directed towards assisting LPAs in adopting a more proactive approach to planning for town centres, and particularly the role of evidence in the plan making process to identify the need for new development and inform the preparation of proactive town centre strategies. Central to PPS4 Policy EC1 the guidance sets out alternative approaches to assessing and identifying quantitative and qualitative needs for retail and other town centre uses. Building on the assessment of needs, the practice guidance explains how LPAs can plan positively and promote new retail-led and other town centre uses through their LDFs; setting out the ‘tools’ needed to prepare effective town centre strategies, including how to identify appropriate locations, and how to assess the effects of alternative policy options and specific proposals.

2.15 Having identified and evaluated the various policy options, LPAs should develop a clear vision and strategy for the network of centres, and strategies for individual centres where appropriate. In terms of the LDF, this is likely to include clear guidance on the appropriate scale and form of new development involving main town centre uses; allocation of sites to meet identified need; identification of the extent of key development opportunities; a clear statement of the approach to be taken to bringing forward development and the LPAs attitude to other competing developments.

2.16 It is added that strategies for individual centres can be prepared at any time but they should be incorporated into the LDF at the earliest opportunity. This is likely to be important where key site allocations are involved, either through strategic allocations in the Core Strategy, or through sites allocated in an Area Action Plan or other document. Promoting town centre strategies through the LDF process ensures that the evidence base which underpins the strategy will be properly tested. A strategy which has been progressed through the LDF process, and been subject to effective public and stakeholder consultation and tested through independent examination will ensure that proposals must be determined in accordance with the plan unless material considerations indicate otherwise.

2.17 When preparing their LDFs, LPAs should identify what they regard as the Primary Shopping Area (PSA) to provide clarity to applicants about the policy status of different sites. In defining the PSA, it may be appropriate to take into account the anticipated future role of the centre, and in particular the scope for growth and expansion. In centres where major expansion is planned, it may be appropriate to indicate where the PSA is likely to be extended to, having regard to the potential for achieving effectively integrated new development.

2.18 LPAs should also identify an appropriate 'town centre boundary' within which they should seek to locate other main town centre uses. It may also be appropriate to define other areas within the town centre but outside the PSA where specific uses are encouraged e.g. specialist retail, offices bars/restaurants etc. In addition to defining the PSA and town centre boundary, where LPAs identify a need for new development to accommodate main town centre uses, they should allocate sites which are suitable, viable and likely to be available within a reasonable timescale to accommodate such needs.

South East Plan, May 2009

2.19 The South East Plan is the spatial development strategy for the South East. It aims to create a sustainable balance between economic, environmental and social benefits to help improve quality of life for everyone in the South East. The plan is founded on six spatial planning objectives:-

- A co-ordinated approach to managing change within the region's key settlements and their hinterlands;
- Focusing new development on the South East's network of regional hubs, according to their role and function, whilst promoting their accessibility and inter-linkages between them;
- Pursuing a continuing strategy of urban focus and urban renaissance, by encouraging accessible mixed use development in the region's network of town centres and by seeking a high quality built environment in all areas;

- Spreading opportunities more evenly around the region through co-ordination of regeneration and social inclusion activity in the region's lagging areas;
- Respecting and maintaining the general pattern of the South East's settlements and undeveloped areas, through the protection of the region's identified Green Belts; and
- Supporting the vitality and character of the region's rural areas, whilst protecting the valuable natural and historic assets of the region

2.20 Horsham is identified as one of 27 Secondary Regional Centres as defined in Policy TC1 (Strategic Network of Town Centres), and is therefore a focus for town centre uses as set out in PPS4. The Plan recognises that the development of dynamic and successful town centres is central to the achievement of sustainable development in the South East. Town centres are vital to the economy providing a mix of uses including residential, business, services, retail, leisure and tourism. Whilst the plan envisages that the most significant growth is expected in the 'Centres for Significant Change' and 'Primary Regional Centres', the policy aims to distribute growth to middle and lower order centres to create a balanced network of centres and development of a lesser scale is expected in Secondary Regional Centres. The relationship of the region's centres with London is also recognised. Given their small scale, neither Billingshurst nor Southwater are identified in the network of town centres in the South East Plan.

2.21 Policy TC2 (New Development and Redevelopment in Town Centres) states that until a review of the RSS has taken place about the broad quantum of growth expected in the strategic network of town centres, local planning authorities should be guided by the following considerations:-

- Local authorities should carry out further work, including joint working where appropriate, to assess the need for further floorspace in town centres and set out a vision and strategy for the network and hierarchy of centres within their area;
- When drawing up Development Plan Documents, Local planning authorities will need to consider whether there is a need to re-balance the network of centres to ensure that it is not overly dominated by the largest centres; and
- Authorities will also need to consider whether there are areas where investment should be stimulated, including town centres with deficiencies, deprived areas, or areas that will undergo significant housing and employment growth.

2.22 Policy TC2 also states that plans and strategies prepared by local authorities and other stakeholders should have regard to the following:

- the need to support the function and viability of pre-eminent town centres to accommodate change and growth within each sub-regional strategy area;
- the need to assess the capacity to accommodate change and growth in such areas;

- the need to respect the historic character, environment and cultural value of existing town centres;
- the need to ensure safe, secure and attractive environments for people to live, shop and work;
- the need to promote new investment of an appropriate scale, in particular in vulnerable centres in need of regeneration;
- the need to support sustainability objectives, including the role of regional hubs, taking account of the impact on traffic and the need to minimise reliance on the car/lorry and promote public transport accessibility; and
- the potential impact on the vitality and viability of town centres.

2.23 Horsham falls within the Gatwick sub region comprising the major urban areas of Horsham, Haywards Heath, East Grinstead and Crawley. The following sets out the key policy messages in respect of the sub region:-

- Sustain and enhance the role played by Crawley-Gatwick in the sub-regional and wider economy;
- Sustain the sub-region's interrelationships with London and the South Coast and the international gateway role of Gatwick Airport;
- Protect and enhance the sub-region's environmental assets;
- Maintain the broad extent of the Metropolitan Green Belt within the sub-region;
- Provide for enhanced learning opportunities;
- Re-generate the town centres;
- Provide employment floorspace in accordance with identified priorities;
- Provide sites for start-up and micro-businesses;
- Retain existing businesses;
- The continued functioning of Gatwick airport to serve the needs of the business community;
- Provide housing in accordance with targets and identified locations.

2.24 Policy GAT3 (Housing Distribution) sets out the sub-regional housing delivery targets. The Gatwick sub-region is set the target of delivering 36,000 net additional dwellings between 2006 and 2026. Policy H1 (Regional Housing Provision 2006-2026) sets a target for Horsham of 13,000.

Horsham District Council Local Development Framework

2.25 The Local Development Framework (LDF) replaced the Horsham District Local Plan 1997 in 2007. It is the portfolio of documents setting out current planning policy for Horsham District at local level, providing the basis on which development control decisions are made. The core documents within the LDF are the Core Strategy 2007, the Site Specific Allocations of Land 2007 and the General Development Control Policies 2007 document. In addition, there are a number of documents offering supplementary planning guidance and evidence to support the formulation of the LDF. Those relevant to this study are briefly summarised below.

Core Strategy (2007)

2.26 The Core Strategy sets out the development strategy for Horsham District. At a high level, the strategy is to concentrate new development within or immediately adjoining Horsham town, including land south of Broadbridge Heath. The strategy states that there should be no provision before 2018 for any further large scale development at Billingshurst or Southwater.

2.27 The Core Strategy offers more detailed guidance by setting out strategic policy relating to town centres, retail and housing in Horsham District. Policy CP4 (Housing Provision) seeks to ensure that provision is made for the delivery of at least 10,575 homes and associated infrastructure in the District within the period 2001-2018.

2.28 Policy CP5 (Built Up Areas and Previously Developed Land) establishes the hierarchy or centres by setting out which centres should have 'built up area boundaries'. The definition of appropriate 'built up areas' with specific boundaries enables a clear and distinct policy distinction related to the form and structure of settlements. These can then be used to assess the potential for development on previously developed land in these settlements.

2.29 Appropriate towns and villages are designated in order to be reflective of their appropriate position in the hierarchy of centres. Horsham, Billingshurst and Southwater are all designated as Category 1 Settlements, defined as 'towns and villages with a good range of services and facilities as well as some access to public transport – capable of sustaining some expansion, infilling and redevelopment'.

2.30 The Core Strategy reiterates national policy guidance in stating the importance of the maintenance and enhancement of the role of town and village centres. The supporting text states that such centres should have a diverse offer in order to be able to provide a range of choice in an attractive environment and an appropriate approach to retailing is defined as a key element of this.

2.31 The District's village centres such as Billingshurst and Southwater are described as performing at a different level to Horsham town centre. Horsham town centre is described as a vital and viable centre which provides a good range and choice of facilities. However, scope is identified for continued improvement, particularly in terms of management to minimise the loss of trade to other destinations. The Core Strategy describes the overall strategy in terms of retailing as being based on taking a positive but cautious approach to the District's centres, particularly in the short term.

2.32 Corresponding Policy CP17 (Vitality and Viability of Existing Centres) lends support to the principle of appropriate development within Horsham town centres and other town or village centres within the District, provided it helps them to adapt and reinforce their role in meeting needs, acting as the focus for a range of activities including retail and do not cause unacceptable levels of disturbance to the local community. The Policy seeks to enhance the vitality of existing retail centres by:

- Permitting appropriate new retail proposals;
- Limiting proposals within existing town centres to under 2,500 sq. m gross floorspace unless relevant criteria in PPS6 are met;
- Restricting retail development, except extensions under 200 sq. m gross floorspace, outside the defined centres unless relevant criteria in PPS6 are met;
- The definition in the General Development Policies document of Retail Frontages in Horsham, Billingshurst, Henfield, Pulborough, Southwater, Storrington and Steyning;
- Controlling change of use from A1 (retail) to A2 (financial and professional services), A3 (cafés and restaurants), A4 (drinking establishments), A5 (hot food takeaway), or residential at ground floor level within the defined Primary and Secondary Retail Frontages, and within neighbourhood/village locations.

2.33 The Core Strategy also sets out policy guidance regarding tourism and cultural facilities. It sets out a framework for taking a proactive stance to encourage tourism within the District while also avoiding new tourism development which could conflict with the objectives to protect the character of the District. Corresponding Policy CP18 (Tourism and Cultural Facilities) formally encourages recreation-based rural diversification and the enhancement of local cultural facilities. Support will be particularly given to a specific range of proposals, including major new hotel accommodation in Horsham town centre and the strengthening of facilities available within the towns and villages on the District.

2.34 The Core Strategy offers guidance regarding the development of specific areas, including Land West of Horsham. Corresponding Policy CP7 (Strategic Allocation – Land West of Horsham) sets out the principles of development, which include the provision of 2,000 homes and other associated uses by 2018. Acceptable uses include improved shopping facilities to meet the additional needs of the expanded communities, subject to the nature and scale of development being justified by the need and there being no materially adverse impact on existing centres.

Core Strategy Review (2009)

2.35 Horsham District is currently formulating its preferred spatial strategy for the next 15 to 20 years. As part of this, in September 2009 it consulted on a number of strategic options for policies to be set out in a new Core Strategy document, including the suggestion that North Horsham be designated as a Strategic Site with potential for the development of 1,500 homes, open space, a neighbourhood centre and the realignment of Langhurstwood Road.

2.36 South Horsham is proposed as another Strategic Site where potential is identified for 1,500 homes and other facilities. Similarly, Land West of Southwater is also proposed as a Strategic Site and suggested development here includes 2,750 new homes, a primary school, a secondary school, community sports facilities, open space and a link road to the Hop Oast roundabout. Finally, land East of Billingshurst is identified as a potential Strategic Site, with the opportunity for 1,750 new homes, a new primary school, community sports facilities, open space, a local centre and a new north/south relief road connecting the A272 with the A29.

2.37 The viability and vitality of existing centres is also discussed. A number of points for consideration are identified, including whether existing policy criteria regarding retail needs to be reviewed in light of emerging guidance, in particular how the policy approach can improve consumer choice and retail diversity. Other key issues identified are whether a more proactive approach to support sustainable economic recovery in existing centres is appropriate and the importance of carefully considering the potential retail provision related to any new strategic development locations.

2.38 As a result of feedback from the September consultation, it has been decided that some of the development site options should be excluded from further investigations as their locations mean it would be harder to create cohesive communities with sufficient services to meet the needs of future residents. Instead, attention would be focused on a 'short list' selected from the original nine site options In February 2010, the short-list was confirmed to include sites West of Ifield, North Horsham, West of Southwater, and East of Billingshurst.

General Development Control Policies (2007)

2.39 The General Development Control Policies document sets out the development control policies for the District, against which all planning applications will be assessed.

2.40 Policy DC34 (New Retail Development within the Defined Town and Village Centres) sets out criteria that must be met for retail development to be permitted within the defined centre boundaries and retail frontages of Horsham town centre and the District's larger centres such as Billingshurst and Southwater. These include:

- The proposal must not exceed 2,500 sqm gross;
- The proposal must relate to and connect well with the defined Frontages and Primary Shopping Areas of the centre;
- The proposal must complement the vitality and viability of the centre;

- The proposal should improve the shopping range, quality and function of the Primary Shopping Area and the retail centre as a whole.

2.41 The policy seeks to maintain and enhance the vitality and viability of the centres by permitting appropriate new retail proposals and resisting any new proposals which may threaten this vitality and viability due to nature, size or location. However, the policy also seeks to ensure that proposals improve the range and quality of the retail offer wherever possible.

2.42 Policy DC35 (New Retail and Leisure Development Outside the Defined Town and Village Centres) states that permission will only be granted for new retail and leisure development outside existing centres when the criteria in PPS6 are met. It highlights a number of relevant criteria including the importance of following the sequential approach, accessibility by a variety of modes of transport and that the proposals must not undermine the vitality and viability of the nearest centre. Additionally, the policy seeks to ensure that any extensions to existing village and neighbourhood shops outside any defined Town and Village Centre will be assessed against Policy DC37, summarised below. For the purposes of Policy DC35, recreation, leisure and entertainment includes cinemas, theatres, restaurants, public houses, bars, cafés and nightclubs.

2.43 Policy DC36 (Change of Use Within Defined Town and Village Centres) sets out guidance regarding proposals for change of use from A1 (shops) to other A-class uses and residential use at ground floor within defined Town and Village Centre boundaries. Policy DC37 (Neighbourhood and Village Shops) offers guidance regarding proposals for small scale development, extensions to or change of use of existing shops and retail units in neighbourhood centres.

2.44 Policy CD37 (Neighbourhood and Village Shops) sets out criteria that must be met in order for small scale retail development, extensions to or change of use of existing village shops or retail units in neighbourhood centres to be permitted.

Site Specific Allocations of Land (2007)

2.45 The Site Specific Allocations of Land document sets out the sites which have been identified for development. There are a number of site allocations which are of relevance and are listed below.

Site	Location	Allocated Uses
Lifestyle Ford, Bishopric	Horsham	Residential, Commercial, Open Space
Parsonage Farm	Horsham	Residential, Employment, Commercial Space
Roffey Social and Sports Club	Horsham	Residential, Recreation, Leisure
Warnham and Wealden Brickworks	Horsham	Comprehensive Mixed-Use to include storage and industrial uses

Site	Location	Allocated Uses
Land at Hammonds	Billingshurst	Residential
Jengers Mead	Billingshurst	Vehicular/pedestrian link between Jengers Mead and Billingshurst Library car parks
Fire Station	Southwater	New Fire Station

Land West of Horsham Masterplan (2008)

2.46 The Land West of Horsham Masterplan sets out a framework for the development of land allocated for development under Policy CP7 of the Core Strategy. A number of Principles of Development are set out, the ninth of which is retail. This expands on guidance in the Core Strategy which supports the provision of improved shopping facilities to meet the additional needs of the expanded communities. Corresponding Statement 23 of the Masterplan states that a small range of around 4-6 non-food retail units will be provided as part of the Broadbridge Heath neighbourhood centre and a shop will be provided in the Denne area, depending on viability. The supporting text acknowledges that the existing Tesco at Broadbridge Heath is dominant in the area and is likely to impact the viability of additional smaller convenience food retailing in the area.

Retail Health Check 2003 and 2005 Update

2.47 Horsham District Council published a Retail Health Check for the District in 2003. It set out a quantitative assessment of retail expenditure capacity in Horsham as well as Billingshurst. Headline findings were that Horsham could potentially have capacity for a new convenience superstore and was also performing adequately as a comparison goods shopping destination. Scope for Horsham to enhance market share was considered to be limited. Billingshurst was found to largely meet convenience shopping needs.

2.48 A 2005 update to the Retail Health Check was completed by Development Land and Planning Consultants Ltd and which considers the current and future trends in Horsham Town Centre. It found that there is minimal need for additional convenience floorspace in the town centre before 2016 and that there is a need to claw back non-retail expenditure.

Summary

- The Government's key objectives, published in PPS4, require regional planning bodies and LPAs to proactively plan for the network and hierarchy of centres to be resilient to future economic changes and to meet the needs of their catchments. Drawing on a sound evidence base, LPAs should identify the need for new floorspace and where necessary identify sites to accommodate identified need focussing on existing centres and areas of deprivation.

- The South East Plan identifies Horsham as one of 27 Secondary Regional Centres and a focus for town centre uses. Whilst the plan envisages that the most significant growth is expected in the 'Centres for Significant Change' and 'Primary Regional Centres', the policy aims to distribute growth to middle and lower order centres to create a balanced network of centres and development of a lesser scale is expected in Secondary Regional Centres. The Plan states that authorities will need to consider whether there are areas where investment should be stimulated, including town centres with deficiencies, deprived areas, or areas that will undergo significant housing and employment growth.
- The adopted Horsham Core Strategy defines the existing hierarchy of centres and policy objectives for shopping and town centres across the District although the Core Strategy Review questions whether existing policy criteria regarding retail needs to be reviewed in light of PPS4. The report also sets out development site options, although the majority have now been dropped following consultation as their locations would be challenging to create cohesive communities with sufficient services to meet the needs of future residents.
- The purpose of this Study is to provide the Council with the most up-to-date evidence base to inform appropriate strategies and policy recommendations for Horsham District to take forward through their Core Strategy review in order to meet the policy requirements of PPS4 and localised growth opportunities. Of particular relevance are the proposed strategic development sites, including land East of Billingshurst and land West of Southwater, which have been selected by the Council for further investigation as potential sites for significant housing-led development.

3. NATONAL RETAIL AND LEISURE TRENDS

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace in Horsham into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the District. This section therefore examines key trends and drivers for change in the retail industry and outlines those of particular relevance to Horsham drawing from a range of published data sources, including research by Verdict Analysis, Mintel, Experian and the New Economics Foundation.

Demographics

3.2 Over the last 15 years the UK population has increased by 3.9 million to 61.8 million, which is a rate of approximately 0.44% per annum amounting to a total increase of 6.7% over 15 years. The number of households has also increased over the same period and at a greater rate (11.5% over 15 years). The average household size has however decreased from 2.46 people per household in 1994 to 2.36 people per household in 2009, as decreasing family sizes and instances of divorce are becoming more common[1].

3.3 The population is forecast to continue growing. The total fertility rate (TFR) in the UK has risen each year since 2001 and was last recorded in 2008 at 1.96 children per woman, its highest level since 1973. Although the current TFR rate has not reached the natural population replacement level of 2.1 children per woman, other factors such as increased life expectancy and immigration combine to boost projected population numbers[2]. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.

3.4 Over the next 20 years the 65 and over age group is expected to grow by 42.9% and the under 65s age group by only 6.4%[2]. Older shoppers have a younger mindset than in the past, they are more fashion aware and, in recent years, more affluent as a result of general house price growth as well as income growth (but post retirement income from pensions could become a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.

3.5 Younger shoppers will have higher education fees to pay, will experience higher housing costs, they will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

[1]Office of National Statistics, 2009. Figures have been interpolated between 1991 & 2001 to account for 2001 Census data
[2]Office of National Statistics, 2009.

Income & Expenditure

3.6 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.29% pa in real terms between 1990 and 2008, with most of this growth on comparison goods where an annual growth rate of 5.67% has been in effect between 1990 and 2008. Convenience goods spend has been growing at a much lower rate with a steady increase of under 0.86% per annum[3].

3.7 Recent economic circumstances, however, have reversed this pattern of growth over the last two years and the pace of economic recovery is expected to affect expenditure growth until at least 2012 when it is anticipated that more normal growth levels will begin to approach their normal levels. The rapid deterioration in the economy's performance during the final months of 2008 is having far-reaching implications for available income and, consequently, expenditure. The outputs from this Study will be widely affected by recent events and the recession. Experian report as follows:

> "*The detailed consumer spending forecasts used in the October document [Experian Retail Planner Briefing Note 2008] were based on figures available before the eruption of the major financial crisis in September, the collapse of consumer and business confidence and the sharp decline in the global economy.*
>
> *Since that forecast, there have been dramatic changes in the UK's performance.*
>
> *The new forecast incorporates the substantial decline in GDP in the second half of 2008; the sharp increase in unemployment in recent months; gloomy survey evidence that has emerged in 2009; fiscal measures adopted in an attempt to shore up the economy and the steep decline in Bank rate in the past few months."*[4]

3.8 Verdict's Economic Update (February 2009) states that "*while the latter half of last year was dominated by gloomy economic news, the impact on the real economy and on real people was marginal. Unfortunately, the financial crisis of last year has now started to spread into the wider economy and we expect this year (2009) to bring declines in growth and increase in unemployment*".

3.9 Verdict emphasised that the UK economy was firmly in the grips of a recession although there are more recent suggestions that the 'end is in sight'. Economic deterioration was rapid with the fourth quarter of 2008 seeing a year-on-year decline of 1.5% - one of the sharpest contractions in economic growth since the early 1980s. 2009 has brought a sharp contraction in activity and Verdict does not believe that the "pain will ease quickly". Indeed, Verdict is forecasting that it won't be until the final quarter of 2010 that we will see positive year on year GDP growth. Moving beyond 2010, economic growth is predicted to return

[3]ONS, Consumer Trends June 2009
[4]Experian Business Strategies, 2009

to positive territory but will be sluggish for a number of years as consumers and the private and public sectors all continue to pay down debt.

3.10 Growth projections used in retail studies and supporting retail statements for planning applications should therefore respond to advice in respect of the most recent economic expectations, followed by ultra long-term trends in the longer term projections. Paragraph B21, Appendix B of the *Good Practice Guide on Need, Impact and the Sequential Approach* states that expenditure growth rates should draw on national long-term trends, but may also have regard to expectations about future regional economic performance and to recent evidence of retail growth. It also recommends that growth rates should generally adopt a conservative level of growth in order to reflect the inherent uncertainty in economic forecasts, and the cyclical nature of the retail sector. The period up to 2011, and to some extent to 2016, will be affected noticeably by the recent recession and the weak upturn that is likely to follow, particularly for comparison goods.

3.11 The growth projections used within this report have therefore responded to advice in respect of the use of trend line (historic) growth rates and forecast growth rates based on consumer expectations. Due to the retail expenditure boom in the latter half of the 1990s and the first half of the 2000s and the major economic recession which is now underway, there are significant differences between these two approaches.

3.12 Trend growth rates have, until recently, been influenced by the spending boom of recent years (until 2007). Trend line forecasting, based on these historic trends, incorporate booms and busts since the 1960s and therefore provide a flat rate average over long and ultra long-time periods, i.e. beyond 2021. These are no longer appropriate for short-term retail projections given the current slow-down in the economy. The period up to 2016 will be affected noticeably by the current severe recession and the weak upturn that is likely to follow. The time period required to enable growth rates to return to ‘boom’ levels is unknown, but it is clear that this is unlikely to happen before 2016.

3.13 On this basis we are advised to use economic forecasts prepared by MapInfo/Oxford Economic Forecasting and Experian Business Strategies which take into consideration current and future economic instability. Evidently, the growth rates used for our retail capacity forecasting have changed as a consequence, and have considerable implications on the levels of floorspace town centres can sustain in the short-to-medium term, i.e. up to 2016.

3.14 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. E-tailing is increasing strongly by both bricks and mortar retailers and non-store virtual retailers, but the rate of growth now seems to be slowing.

3.15 Experian published a note on ‘non-store retailing’ in March 2010 setting out revised estimations of Internet retail sales which are much higher than previously expected. These estimations are based on revised

ONS data which adopts an improved methodology of all sales made over the Internet covering 95% of the retail sector in terms of turnover. The ONS series previously suggested in mid-2009 that Internet sales were 3.5% of total retailing sales, but the revisions now suggest the figure is nearly double this. In their note, Experian provide forecasts to 2026 which take into account the impact of broadband technology, speed of access to the Internet, problems of delivery and receipt of goods when away from home at work etc.

3.16 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements. See the subsection on Internet shopping and e-tailing below for more information.

3.17 According to Verdict, customers are becoming more selective in their purchasing habits as they become more concerned about the economic outlook. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores. Such circumstances will have implications on retail capacity forecasting, particularly over the short-term.

3.18 Consumer spending is likely to remain weak over the coming months. Taxes are rising to pay off substantial government debt, wage growth is slowing and unemployment is rising; consumers are prioritising debt reduction; these factors are expected to combine to offset any advantages from falling inflation and ensure that spending will remain low. However there will be pockets of growth as the weak pound encourages increased tourism activity[5].

Sales Efficiency

3.19 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the turnover ‘efficiency’ (or ‘productivity’) of existing retail floorspace to reflect retailers’ ability to improve their productivity. This increased efficiency helps maintain the vitality and viability of town centre businesses.

3.20 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover ‘efficiency’ growth rate is a standard approach used

[5] Verdict Research: “UK Sectors Summary Q4, 2009”

in retail planning studies and PPS4 also advocates the use of "a realistic assessment of…forecast improvements in productivity in the use of floorspace"[6].

3.21 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. PPS4 (EC1.4.c.iii) requires that quantitative need assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.

3.22 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future, sales density growth is also expected to decrease. For comparison goods, we are now incorporating an efficiency growth rate of 1.5% per annum in the period 2010 to 2015 and 2.0% per annum between 2015 and 2025. For convenience goods we have incorporated an efficiency growth rate of 0.4% per annum between 2010 and 2015, and 0.5% per annum post 2015.

Employment

3.23 Between 1998 and 2007 retail expenditure has increased by approximately 5.5% per annum, but retail employment has increased much more slowly. Over the same period total employees in retail employment in Great Britain have increased from 2.63 million to 2.76 million, an increase of 0.5% per annum. However, this growth has been made up mostly part time employment. Full time equivalent (FTE) employment has increased very little[7].

3.24 Over the next 15 years Experian Business Strategies expect a 13% increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions[8].

[6] PPS4, Paragraph EC1.5.c.iii
[7] Annual Business Enquiry, 2009
[8] Experian, FTE Employment Levels, Retailing (SIC 2003 code 25)

Size of Units

3.25 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sqm or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

3.26 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 5.5%% reduction in the total number of convenience stores between 1998 and 2008, as space is concentrated into a smaller number of larger stores.

3.27 Over the same time period the number of superstores (>2,323 sqm net) has increased by 39%; food specialists and off licences/tobacconists have also declined - by 32.9% and 56.6% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples[9].

3.28 Out-of-town store sizes have also increase in size between 1998 and 2008, over the period average out-of-town store sizes have increased from 1,939 sqm by 5% to 2,037 sqm[10]. Average town centre retail store sizes increased slightly between 1998 and 2008, rising from 183 sqm to 193 sqm, an increase of 5.5%[11].

Foodstores

3.29 Due to the restrictions on developing large new foodstores, there has been growth in the number of applications for the extension of existing foodstores and an adjustment in the composition of floorspace within existing stores over the last ten years. There has been an increased emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and profit margins are greater, although sales densities are often lower.

3.30 This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict,

[9] Verdict Research, Datamonitor: “UK Food & Groceries Retailers 2009”
[10] Verdict, Datamonitor: “UK Out-of-Town Retailing 2009”
[11] Verdict Research, Datamonitor: “UK Town Centre Retailing 2009”

comparison goods floorspace in the larger format stores of the top four grocers now accounts for averages of between 18% (Morrisons) and 40% (Asda) of net retail floorspace[12].

Internet Shopping / e-Tailing

3.31 Internet sales are growing rapidly and affecting how and where we shop, although the growth rate slowed markedly in 2008. In the early days of Internet retailing, back in the late 1990s, growth was due to the emergence of virtual retailers. Things have moved on in recent years and recent research indicates that much of the growth in Internet sales has been from sites of established retailers (e.g. Tesco, Argos, John Lewis etc.), who are creating “virtual outlets” to expand their market shares of retail spend.

3.32 In 2008 there was an increase of 1% in the number of Internet users to 35.4 million people, and an 18.1% increase in online shoppers to 26.7 million shoppers. As technology continues to improve, it will fuel further growth in the market. Overall the Internet shopper population is forecast to grow by approximately 50% between 2007 and 2012. In addition to this increase the amount of money the average Internet shopper is spending online is also increasing, average online spend per person rose by 5.8% between 2007 and 2008[13].

3.33 High street retailers have particularly benefitted form the growth of Internet shopping as their brand are widely recognised and trusted by consumers. They also benefit from greater buying power, which means they are often able to offer discounts. Price-comparison sites have also increased the trend towards price cutting on the Internet, particularly in relation to small electrical products, CDs and software.

3.34 Despite this growth, e-tailing still only accounts for a fraction of total sales for mainstream retailers in the UK. Furthermore, sales on the Internet have to some extent been a switch from mail order and for some retailers (e.g. Tesco) involve sales from retail rather than warehouse floorspace. Even where sales are from warehouses, retail floorspace may still be required to fulfil a showroom function. In addition there are a growing number of signs that the Internet is beginning to mature and enter a new, more subdued phase of growth. Growth in the number of shoppers in 2008 was strong, but significantly less than growth seen in 2007[14].

3.35 Verdict predicts a significant alteration in the products and sectors which consumers shop for online coming out of the recession. It is anticipated that the recession will leave a lasting impact on consumer attitudes towards spending and with the advantage of low price and added convenience, the Internet is expected to become even more attractive to shoppers. The offer of cheaper connections and other incentives expect to see the take up rates of less affluent shoppers achieve substantial growth. Verdict also anticipate significant growth in older shoppers (55+) which will eventually become a crucial target for

[12] Verdict Research: ”Grocery Sales Analysis Sheet”, 2008
[13] Verdict Research, “e-Retail Storms Ahead Through the Recession”, June 2009
[14] Verdict Research, “e-Retail Storms Ahead Through the Recession”, June 2009

retailers; particularly as within 10 years Internet-adept 35-44 year olds will move into the 55+ demographic, taking their Internet shopping habits with them.

3.36 As a consequence of this growth, there will continue to remain reasonable pressure on the traditional brick and mortar retailers in the UK's town centres. Shoppers are able to select their own retail mix online and shopping centres will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a shopping 'experience' that the Internet is unable to match. In accordance with PPS4, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Shopping & Leisure

3.37 Due to increased affluence and mobility, and the rise of the Internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.

3.38 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

3.39 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Leisure Trends

3.40 The leisure industry has enjoyed buoyant market conditions over the last decade as a result of growing levels of disposable incomes and low unemployment. Much of the growth has been fuelled by an increase in the number of 'cash-rich, time-poor' consumers who have been prepared to pay a premium price for convenient services in order to save time. Leisure time has become a precious commodity to consumers and in order to maximise free time, consumers have often combined leisure activities as part of an overall going out experience. The range of leisure choices has also grown considerably leading to an increase in competition in the industry.

3.41 The recession has brought many challenges for the industry. On one hand, the industry is considered to be particularly exposed to the economic downturn due to the discretionary nature of leisure expenditure, but contrary to this leisure activities remain an important lifestyle choice for many consumers and who will prioritise leisure over other areas of spending.

i) Cinema

3.42 Cinema audiences grew significantly during the 1990s, but by the start of the current decade the growth had slowed and research by Dodona (2009) indicates that the market has reached a plateau. Table 3.1 provides a summary of key industry indicators and charts changes in revenues and screen numbers between 2003 and 2008.

Table 3.1: UK Cinema Market 2003-2008

	2003	2004	2005	2006	2007	2008
Screens	3,318	3,342	3,357	3,440	3,514	3,610
Admissions (£m)	167.5	171.5	165.7	156.6	162.4	165.2
Average Ticket Price (£)	5.43	5.49	5.68	5.87	5.05	6.18
Gross Box Office (£m)	742.000	770.000	771.350	762.300	820.000	850.200
Spend per head (£)	1.70	1.75	1.80	1.85	1.90	1.95
Screen Advertising Receipts (£m)	65.000	70.000	70.000	85.000	90.000	86.500
Admission per person	2.81	2.86	2.73	2.58	2.63	2.61
Admission per screen	50,482	51,317	49,059	45,523	46,223	45,491

Source: Dodona Research 2009

3.43 In 2008, there were 3,610 cinema screens across the UK, of which three-quarters were multiplexes[15]. The remainder are traditional cinemas that have been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The dominant operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share.

3.44 The cinema industry is not immune from the recession and there were some closures during 2008, the majority being art centre venues rather than high street chains. The current economic downturn has hit advertising revenues but in general the industry is considered to be in good health. Indeed, in October

[15] Purpose-built cinema complexes with more than five screens.

2009, The Times[16] reported that cinemas are experiencing a boom with UK cinema admissions for the first six months of 2009 at their highest levels since 2002. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families.

3.45 Over the last couple of years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. National Amusements rolled out its 'Cinema de Lux' concept at three shopping malls in 2008, which is a high service concept with allocated leather seating, contemporary dining and concierge facilities.

3.46 Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens like the Capitol complex outside Horsham, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.

3.47 Dodona also suggest that very large cinemas have fallen out of favour. They cite Odeon's new 14 screen cinema in Liverpool, which opened in October 2008, which is the first cinema of this size to open since May 2005. It would appear that new cinemas are being built to serve smaller catchment areas and despite often having the same number of screens, the number of seats in each auditorium has been reduced.

3.48 Investment in new cinemas is continuing but this is no longer producing such high levels of growth so the focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing. More recently in the midst of the recession, HMV announced that it was testing a three screen art-house format above its Wimbledon music store.

ii) Bingo

3.49 Bingo is one of the oldest forms of gambling in the UK and has traditionally had a downmarket image limiting its appeal as a night out for the majority of the population. The typical bingo player has been perceived as working class, female and from the older demographic. However, over the last decade, the market saw a rise in the number of younger and more affluent players and deregulation allowed clubs to offer bigger prizes.

[16] The Times 'Twist in the plot as British cinema defies the recession', October 24th 2009

3.50 Nevertheless, more recent research by Mintel (2007) highlights that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of the online gambling. The recession has also hit the market and although operators have attempted to diversify their offer to halt the decline in participation rates, it would appear that this has merely slowed the decline and operators continue to struggle in tough market conditions.

iii) Ten Pin Bowling

3.51 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree and ten pin bowling remains a strong family activity.

3.52 Mintel research (2006) state that recently, high-end, centralised venues have started to emerge, but the question remains whether this can dispel the lingering sense amongst many that bowling is either passé or too child, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

v) Pubs and Clubs

3.53 The pub industry continues to suffer from the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. Other factors such as competition from the supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Many of the large national pub chains have faced difficulties and there have been cases of administration. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.

vi) Restaurants

3.54 It is generally considered that the recession has brought mixed fortunes for the restaurant sector. The main casualties appear to have been from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands have announced stable results and are seeking to trade through the uncertainties by offering heavy promotions and discounts. The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands as they have been able to negotiate substantial discounts on rents and landlords have been offering attractive incentive packages to help fill vacant units.

3.55 For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's. There has also been a surge in 'all-you-can-eat' style restaurants which are aimed at offering value for money for working class families. The Taybarn brand owned by Whitbread is currently trading very strongly and the brand is pursuing aggressive openings in the current market despite concerns over the quantity of food that is consumed in such restaurants and the implications for health.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, the economic crisis will have an impact on the retail sector, and growth forecasts will need to reflect recent publications from Experian Business Strategies.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such retailer requirements. This is particularly noticeable in the convenience sector, which has begun to offer an increasing supply of comparison goods in the larger foodstores, in addition to the traditional product offer; such stores therefore require more retail floorspace. The dominance of such foodstores has led to current concerns about market dominance and the lack of competition.
- As competition from the Internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these centres. Where smaller centres have been unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure. The mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.
- Reports now suggest that the recession has officially ended but the economic growth outlook remains weak and fragile in the UK. It is expected that 2010 will be a difficult year but gradual improvements will follow.

4. SUB-REGIONAL CONTEXT

4.1 This section examines the retail performance of centres in Horsham in the context of the retail network across the wider sub-region. Our analysis draws on the household telephone survey results and other data (including PROMIS, Javelin Retail Rankings, the Focus Property Intelligence database, the Valuation Office Authority and EGi) to identify the main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence shopping patterns in the region in the future.

4.2 The household telephone survey highlights that the main centres that compete with Horsham include Brighton, Crawley, Guildford and Worthing. The location of each centre in relation to Horsham and the extent of the telephone survey area is illustrated on Plan 1.

4.3 Summary tables showing the performance indicators for each competing centre are included in Appendix 1A. The rank of each competing centre has been derived from Javelin (Venuescore 2009). Javelin Group's Venuescore provides an up-to-date ranking of UK shopping venues across a number of key indicators – scale, market positioning, fashionability and age positioning of the retail offer. The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Debenhams receive a higher score than unit store retailers to reflect their major influence on shopping patterns. The resulting aggregate score for each venue is called its Venuescore.

4.4 Shopping patterns derived from the telephone survey allow us to calculate the amount of comparison goods expenditure that each competing centre draws from within the District. This indicator takes into consideration the strength of the retail offer as well as the centres' accessibility and distance from Horsham. The total expenditure leaking to these centres is set out in Table 4.1 below, and illustrated on Plan 2.

Table 4.1: Study Area Comparison Goods Trade Draw: Key Competing Centres

Centre	£(000s)	Market Share (%)
Horsham	**£229,369**	**23.8%**
Crawley	£206,862	21.5%
Worthing	£56,013	5.8%
Guildford	£48,900	5.1%
Brighton	£25,089	2.6%

Source: Household Telephone Survey, February 2010

4.5 It is evident that Horsham town centre is the most dominant centre in terms of comparison goods trade drawing circa £229.4m of comparison goods expenditure (24%) from within the survey area, a strong proportion of which is retained within the District boundary. Crawley is Horsham's main rival and the second most dominant centre in terms of comparison goods trade in the study area, drawing £206.9m (22%) of comparison goods expenditure. Worthing and Guildford are less influential and only achieve a market share between 5-6%. Brighton is the least influential with a 2.6% market share in the survey area.

Profile of Key Competing Centres

4.6 **Crawley** is located approximately 8.5 miles to the north east of Horsham town centre and is defined as a Primary Regional Centre and a Centre for Significant Change in the South East Plan (2009). The centre comprises in the region of 105,073 sqm gross retail floorspace which is generally concentrated within a pedestrianised precinct (comprising Queen's Square, Queensway, the Martlets and Broadwalk) and within the Country Mall shopping centre which is anchored by Debenhams and Bhs. A breakdown of the centre's key retailer representation is provided in Appendix 1B. The most recent Experian Goad survey (July 2009) shows that the centre has a below average vacancy rate and according to Focus there were 26 retailer demands for Crawley in March 2010. Crawley also ranks higher than Horsham in the Venuescore rankings.

4.7 As highlighted above, Crawley is the second most popular shopping destination in the survey area with a trade draw of circa £206.9m, equating to just below 22% market share. This can largely be attributable to its location within the survey area in addition to its competitive retail offer. The extent of Crawley's influence over the District is illustrated on Plan 4 which shows that the centre has a relatively dilute but far-reaching influence across the survey area. Its dominance in Zone 4 and to a lesser extent Zones 1 and 9 outside the District boundary is also evident.

4.8 In terms of new retail development coming forward, the most significant scheme in the pipeline for Crawley is the planned redevelopment of part of the town centre. Grosvenor has been selected as the development partner for the scheme which will potentially include a 23,000 sqm John Lewis anchor and a further 65,000 sqm of retail and office floorspace and a new town hall. However, the scheme is presently being revised due to the impact of the recession on values which has created significant difficulties in bringing development forward and the timescales remain lengthy. A brief summary of all schemes currently in the pipeline in Crawley is included in Appendix 1C.

4.9 **Worthing** falls outside the survey area, located approximately 20 miles from Horsham town centre, on the south coast. The centre is defined as Primary Regional Centre in regional planning policy and draws approximately £56m comparison goods expenditure (5.8%) from the survey area. Plan 5 demonstrates that Worthing is generally influencing shopping patterns in the south of the District reflecting geographical proximity and the strategic road network.

4.10 The centre comprises approximately 118,226 sqm retail floorspace which is focused along pedestrianised shopping areas (Montague Street, South Place and Warwick Street) and within the two shopping centres: the Montague Centre and the Guildbourne Centre. The most recent Experian Goad survey (December 2009) shows that the centre has an above average vacancy rate although according to Focus there were 23 retailer demands for Worthing in March 2010. Worthing also ranks higher than Horsham in the Venuescore rankings, although its position has fallen since 2008.

4.11 There are major proposals in the pipeline for Worthing, including pre-application discussions relating to a redevelopment scheme incorporating the Guildbourne Centre which may deliver approximately 40,000 sqm gross additional retail floorspace. Outline planning permission has also been granted for the Teville Gateway Scheme involving the redevelopment of Teville Gate, located north town centre and adjacent to Worthing Station, to create a new gateway to the centre. The scheme will comprise a mix of leisure, commercial and residential uses, a replacement foodstore and approximately 2,300 sqm gross of additional retail floorspace.

4.12 **Guildford** also falls outside the survey area, located approximately 21 miles to the north-west of Horsham; however it has an influence across all survey zones within the District, with the exception of Zone 10 (see Plan 6). Guildford is currently drawing £48.9m of comparison goods expenditure from the survey area, representing 5.1% market share.

4.13 Guildford is defined as a Primary Regional Centre and a Centre for Significant Change in the South East Plan (2009). The centre comprises in the region of 114,373 sqm gross retail floorspace which is largely concentrated on and around the pedestrianised High Street. The centre has three small managed shopping centres: the Friary Centre, Tunsgate Square and White Lion Walk. The Friary Centre is the largest shopping centre which is anchored by Bhs and accommodates several multiple retailers including Topshop/Topman, Burton, the Disney Store and Clarks.

4.14 The centre also benefits from three large department stores (Debenhams, House of Fraser and Marks & Spencer), a range of high-end fashion retailers including L K Bennett, Ghost, Jack Wills and Viyella, in addition to several specialist retailers such as The White Company and Culpeper which supports a more diverse offer. The convenience offer in the centre is more limited and the Sainsbury's Central on High Street is the only supermarket provision.

4.15 Guildford is very popular with retailers and the Focus database currently identifies 107 retailer requirements for the centre. The centre has also been resilient in the face of the recession, retaining prime retail rents of £2,583 per sqm and low retail yields (4.25% in 2008), providing a further indication that there is strong investor confidence in the centre.

4.16 The key scheme in the pipeline for Guildford is the long-awaited extension to the Friary Centre which was granted planning consent in 2006. However construction of the scheme, which involves the creation of approximately 25,000 sqm gross additional retail floorspace across 70 unit shops, is currently on hold and a application to extend the time limit for implementation has been submitted to Council suggesting that it is still some way of commencement.

4.17 **Brighton** is located approximately 26 miles from Horsham and is the highest ranked centre in the sub-region, ranked 9th in the UK as a whole. The centre is defined as a Primary Regional Centre in the South East Plan and is recognised as a historic centre and a key tourist destination. The role of the Brighton as a popular 'day-out' shopping and leisure destination is evident by its extensive but diluted influence across the survey area (Plan 7). Brighton currently draws £25.1m of comparison goods expenditure from the survey area representing a 2.6% market share.

4.18 The centre comprises approximately 217,226 sqm gross floorspace and the retail offer is extensive with strong representation from national multiple retailers and several up-market retailers such as Cath Kidston, L'occitane, Kurt Geiger, Reiss and Space:NK. There is also a good range of services on offer particularly in the food and drink and leisure categories.

4.19 Whilst Brighton has an extensive retail offer, the centre has just one managed shopping centre, Churchill Square which is anchored by Debenhams and Bhs. The shopping centre originally opened in 1968 but was extended and refurbished in 1998. Since then, full planning permission has been granted to extend the unit currently occupied by Next by c.1,800 sqm gross retail floorspace. A further extension is planned as part of a wider scheme involving the redevelopment of the Brighton Centre although detailed work has not yet started on a concept scheme suggesting the timeframe for completion could be in the region of 10-15 years away. This is the most significant development presently in the pipeline for Brighton, details of other schemes coming forward in the Brighton area are included in Appendix 1C.

Summary

- It is evident that Horsham town centre is the most dominant centre in the survey area achieving a market share of 24% and the centre retains a strong level of comparison goods expenditure from within the District boundary.
- In terms of the sub-regional context, the household telephone survey has identified Crawley as the main competing centre for Horsham. Guildford and Worthing, and to a lesser extent Brighton, also exert some influence over the District although market share is generally diluted across the breadth of survey area.
- The proximity of Crawley and its overall retail offer is reflected by its 22% market share in the survey area. Despite being located outside the survey area, it is evident that Guildford and Brighton both also have a superior retail offer and increasingly mobile shoppers have led to a continued influence on shopping patterns in Horsham's catchment area; although this is minimal in quantitative terms providing reassurance of Horsham's strength in the catchment area.

- Clearly additional growth in these centres has potential to increase their overall influence across the survey area and Horsham District. It will therefore be important for Horsham to build on its strengths to ensure it maintains and where possible, enhances its market share, to offset planned growth elsewhere in the sub-region.

5. QUALITATIVE ASSESSMENT

5.1 In this section we present our qualitative analysis of Horsham, Billingshurst and Southwater and highlight any significant changes that have arisen since the previous retail assessments in 2003 and 2005. We also review the main out-of-centre retail provision and its influence over shopping patterns in the District.

Horsham Town Centre Health Check

5.2 Horsham town centre is located towards the north of the District, approximately eight miles to the south west of Crawley and the M23. Horsham is a historic town centre which has kept pace with shoppers and retailers' needs through redevelopment and enhancement of retail facilities, whilst conserving an attractive, historic environment. The main shopping provision is located on West Street, the traditional linear high street; Carfax, the traditional market square; and in the Swan Walk and Piries Place shopping centres. This is supplemented by a number of more secondary shopping areas.

Diversity of Uses

5.3 The Experian Goad survey of Horsham town centre (January 2009) identified a total of 76,859 sqm of ground floor floorspace for retail trade and services, comprising 361 units. This information is drawn from the most recent 'category report' produced by Experian Goad which provides a detailed breakdown of uses within the following categories: Convenience, Comparison, Service and Vacant. These reports marginally vary from Experian's 'town reports' used in the previous study which listed various miscellaneous outlets (e.g. Post Office, Employment/Career Services) that are now included under the broader 'Services' label in the category reports. Whilst this does result in some minor discrepancies between retail composition established in the previous studies, the more up-to-date information is considered the most relevant data for the purposes of this study. Our health check analysis is also informed by site visits undertaken in March 2010. Table 5.1 sets out the current retail composition in terms of the number of units compared to the average for the UK and the average for the South East region.

Table 5.1: Horsham Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)	South East Average (%)	Variant (%)
Convenience	25	6.93	8.83	-1.90	8.05	-1.12
Comparison	149*	41.27	33.95	7.32	45.33	-4.06
Service	159	44.04	45.83	-1.78	35.17	8.87
Vacant	28	7.76	11.22	-3.46	11.45	-3.69
Total	**361**	**100**	**100**	**-**	**100**	**-**

Source: Experian Goad Category Report, January 2010 *Excludes Tan Bridge Retail Park

5.4 It is evident that the centre continues to have a below average representation of units occupied by convenience goods retailers. Against the UK, the centre has marginally below average representation of service operators, however this level of provision is high compared with the average for the south east region. Similarly, the number of comparison retail units remains high (+7.3%) in terms of the UK average, but falls below average compared with the region.

5.5 On closer analysis, in terms of the more detailed breakdown of provision against the UK average benchmark, Horsham continues to have a below average representation of bakers, butchers, fishmongers and CTN retail units. As previously highlighted, this apparent deficiency in more specialist convenience goods retailers is compensated for by an above average provision of more general convenience goods provision, including grocers and delicatessens and supermarkets. There is also above average representation of health food stores, off licences and shoe repairers/key cutters. The local produce market in Carfax every Saturday and the general market on Bisphopric every Thursday and Saturday supplement the convenience retail provision.

5.6 In terms of comparison goods retailers, Horsham has an above average representation in the womens and general clothing categories whilst representation of retailers selling menswear is marginally below average. There is above average representation in other comparison retail categories including department/variety stores, jewellery, electrical goods, greeting cards, stationers, telephones, fitted furniture, textiles and soft furnishings, toys and games and toiletries, cosmetics and beauty products. Horsham has below UK average representation from footwear retailers, florists, booksellers and charity shops. Overall, the centre has a good range of comparison products on offer, underpinning its role as a comparison shopping destination.

5.7 Service businesses in the centre account for 44% of all retail units within Horsham town centre. Closer analysis indicates above UK average representation from estate agents, retail banks, opticians, travel agents, restaurants, video tape rental and financial services. In terms of leisure services, there is below UK average representation from betting offices, bars/wine bars, public houses, cafes and fast-food take aways.

5.8 There is also no provision within the cinema, theatre and concert halls leisure category within the town centre although ‘The Capitol’ is located within walking distance on North Street between the main shopping area and the train station. The Capitol, which underwent substantial refurbishment in 2003, offers a theatre, two cinema screens, a studio, gallery space, café and lounge bar.

5.9 Whilst the number of service businesses in the centre is currently below national average this does not necessarily indicate the need for additional provision. Any new service businesses in the centre should be carefully monitored and managed to minimise risk of undermining the retail function of the town centre.

5.10 Table 5.2 sets out the retail composition of Horsham in terms of floorspace. It is evident that the proportion of floorspace in the convenience and service categories is still below average. In contrast, the proportion of comparison retail floorspace is above average (+12.26%), reflecting our analysis above. The level of vacant floorspace in the town centre is also below average, although this is discussed in more detail later.

Table 5.2: Horsham Retail Composition by Floorspace

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	10,470	13.62	13.82	-0.20
Comparison	38,341*	49.89	37.62	12.26
Service	23,988	31.21	38.83	-7.62
Vacant	4,060	5.28	9.59	-4.31
Total	**76,859**	**100**	**100**	**-**

Source: Experian Goad Category Report, January 2010 *Excludes Tan Bridge Retail Park

Retailer Representation

5.11 The presence of multiple retailers in a centre can enhance the appeal of that centre. In January 2009, Experian identified 178 multiple retailers out of the total 361 retail units in Horsham (53.5%). This proportion of multiples is marginally greater than 50% established in out previous study suggesting that the centre remains attractive to multiple retailers. Notwithstanding this marginal increase in multiples, the centre has maintained a diverse independent sector which adds to the diversity of the retail offer.

5.12 Closer analysis shows that the majority of multiples are within the comparison retail category and represent 59% of the total number of comparison outlets. Within this category, there are a high number of multiple clothing stores such as TopShop, Next, Dorothy Perkins, Fat Face, Crew Clothing and TK Maxx. There are also several multiple mobile phone shops e.g. Carphone Warehouse, Orange, O2 and Phones 4 U. Other key multiples in the centre include Marks & Spencer, Bhs and Beales department store. There are also several multiple coffee shops (e.g. Starbucks and Costa Coffee) and restaurants (e.g. Pizza Express and Strada).

5.13 The main multiples in Horsham are located within the Swan Walk Shopping Centre and on West Street. The Swan Walk Shopping Centre opened in 1976 and is located towards the north of West Street with links through to Carfax. It has a total floorspace of approximately 23,225 sqm, including a 929 sqm extension that was added in 1989. The centre underwent its last major refurbishment 1990, which included adding a glass roof. The shopping centre presently offers a pleasant, modern shopping environment and key retailers represented here include Marks & Spencer, Boots, Bhs, Accessorize, WH Smith and Superdrug. There are however a noticeable number of vacant units within the shopping centre, many of which are located along the western wing known as Springfield Court. This area generally appears less vibrant in contrast to the rest of the shopping centre.

5.14 As highlighted in our previous study, one of the key drawbacks of Swan Walk is that the size of units in parts of the centre, do not meet modern retailer requirements for larger floor plates. Our recent on-site survey (March 2010) identified ten vacant units in Swan Walk, equating to 18.5% of the total number of units in the shopping centre. These units equate to approximately 1,180 sqm gross of vacant retail floorspace suggesting an average unit size of 118 sqm. The largest vacant unit is 230 sqm gross and the smallest is 30 sqm gross. In terms of occupied units, Bhs and Marks & Spencer occupy the largest units which are in excess of 2,000 sqm gross whilst other multiple retailers Boots and Wilkinson occupy units in excess of 1,000 sqm gross. Other larger units are occupied by Superdrug (540 sqm gross) and WH Smith (380 sqm gross). These units are numbered 8-9 and 35-37 which suggests that they have been merged in the past although we cannot be certain of this.

5.15 Outside the shopping centre, additional comparison multiple retailers are located on the pedestrianised West Street. The whole of West Street is designated within the primary shopping frontage and multiples here include Next, Robert Dyas, Clarks shoes, Fat Face, Millets, Poundland and TopShop. There are also several multiple service operators including Costa Coffee, Starbucks, Wimpey, Boots opticians, Toni & Guy hair salon and several of the main high street banks and building society operators (e.g. Barclays, HSBC and Lloyds TSB).

5.16 Towards the eastern end of West Street is the large open pedestrianised square known as Carfax. Carfax is the location of several other national and local business services including several high street banks and building societies (Natwest, Halifax, Santander and Nationwide), estate agents, solicitors and the post office. Other more specialist retailers on the Carfax include the Hoffmans cheese shop, the Country Produce delicatessen and the Forfars Fresh bakery.

5.17 To the south east of Carfax, East Street remains the location of a number of more specialist retailers alongside the centre’s main concentration of restaurants. Restaurants located on East Street include, Pizza Express, Strada, Tortellini and Cote Brasserie. There is also a new Japanese restaurant ‘opening soon’ which will be the first Japanese restaurant in Horsham. Bar Vin wine bar and River Kwai restaurant are located nearby on Market Square. This is considered a good, strong mix of provision for a centre of this scale.

5.18 There are some additional restaurants and wine bars located to the north of East Street within the Piries Place precinct. Piries Place opened in 1990 and is anchored by a 1,347 sqm net Waitrose foodstore. The precinct comprises approximately 32 units across c.3,780 sqm gross retail floorspace (including Waitrose). With the exception of Waitrose, units are generally small in scale and occupied by a range of specialist retail and service operators including Bang and Olufsen home entertainment, Oxygen Extreme outdoor clothing, Mailboxes etc. business services and Dr China herbal medicine.

5.19 Although there are several pedestrian links through to Carfax and East Street, the precinct appears to have poorer pedestrian circulation and is constrained by design as the shop frontages face inwards and are hidden behind retail units on Carfax and East Street. The main focus for activity appears to be the Waitrose which was relatively busy at the time of our site visit in March 2010. The Waitrose is therefore maintaining footfall in Piries Place although we observed little evidence of linked shopping trips between the foodstore and the rest of the precinct.

5.20 The Waitrose, which originally opened in 1990, has a net floorspace of approximately 1,350 sqm net. The store has an adjacent multi storey car park with approximately 320 spaces. The car park is operated by the Council and charges apply between 08:00am and 06:00pm Monday to Saturday. The store offers a good range of convenience products including meat, cheese, fish and salad counters and a patisserie and delicatessen.

5.21 In October 2003, the centre's newest retail area known as 'The Forum' opened to the south of West Street. The mixed-use development led by Sainsbury's in conjunction with the Council created four large retail units, presently occupied by Beales department store, TK Maxx, Blacks and Cargo, with residential apartments above. Beales is the only department store in the centre and offers a wide range of goods including homewares, clothing, cosmetics, jewellery, luggage, stationary and lingerie. There is also a Mamas & Papas concession and an in-store café. The Forum is linked to West Street via a small, 'back street' walkway which does little to encourage linked trips between the two retail areas.

5.22 To the front of the Beales and TK Maxx units there is a further café with outdoor seating and a large open piazza which facilitates pedestrian access between the main shopping area and the Sainsbury's located in the south of the centre on Worthing Road. The Sainsbury's store was also extended as part of the development scheme.

5.23 Today, the Sainsbury's store has a floorspace of c.4,544 sqm net, a substantial increase from the original store which opened in 1995 with a floorspace of c.3,200 sqm net. Following the extension the level of parking provision adjacent to the store has been reduced from 550 spaces to 350 spaces. Parking charges apply to Sainsbury's customers after 2 hours and non-customers after 30 minutes. The store is open seven days a week and provides a comprehensive food offer, including fresh fish and meat counters, hot food and deli counters and an in-store bakery. In addition, approximately 10% of the store's sales area is dedicated to non-food items such as clothing, electrical goods, homewares and cosmetics. There is also a pharmacy, a newsagent, a café, and a dry cleaner facility within the store. Outside the store there is a petrol station and cash point facility.

5.24 The Sainsbury's and the Waitrose are the main foodstores in Horsham although the centre's overall convenience offer also includes a good, strong representation of smaller, independent convenience retailers e.g. Country Produce, Chris White Butchers and Forfars Bakery amongst others. There is also a Simply Food within the Marks & Spencer store in Swan Walk which comprises 832 sqm net floorspace. Additional information on the main foodstore provision in Horsham is provided in Appendix 2A.

Vacant Retail Property

5.25 The Experian Goad survey (January 2009) identifies 28 vacant units in Horsham, comprising a total of 4,060 sqm gross vacant floorspace. Whilst there has been an increase in vacancies since the June 2005 Study, in terms of both unit count and floorspace the present vacancy rates is very low compared to national average.

5.26 Our site visit in March established some variation in the location of vacant units due to general turnaround, although the overall total number of vacant units has not substantially changed; we identified 29 vacant units in March 2010, compared to 28 in January 2009. As highlighted above, there are several vacant units within Swan Walk, notably along Springfield Court, which is surprising based on the primary retail function of the centre and may be a cause for concern. As suggested previously, the increase in vacant units within the shopping centre may be a result of retailers seeking larger premises, or may be a direct result of recent economic difficulties and retailers either entering into administration (e.g. Whittards) or seeking more affordable premises. In contrast there is a single vacant unit on West Street. The remaining two other vacant units on the street have now been occupied.

5.27 Other vacant units are broadly distributed across the centre, although there are several new vacant units at Carfax following the closure of Bagal Bites, M Wheeler estate agents, Day Lewis Chemist and the relocation of Bloxham bookmakers. There is also a large vacant public house on the corner of East Street and Carfax which has a dominating presence and would benefit from being brought back into reuse in such a prominent location. We understand from the Council that Italian restaurant chain Ask will be moving into part of the building.

Retailer Requirements

5.28 Table 5.3 sets out the number of retailer requirements for Horsham, together with the relative change in its rank order, over the period between 2005 and 2009. It is evident that retailer requirements have generally declined since peaking at 60 in 2005 although the centre's rank position has actually improved reflecting the strength and appeal of Horsham comparable to other centres which have declined in ranking terms. Consistent with national trends and the economic crisis in 2008 (for which there is no published data), the number of recorded requirements in 2009 (38) are at the lowest recorded level since 2005.

Table 5.3: Horsham ranking of Retailer Requirements

No. Requirements	Ranking (1st Highest)	Date
38	66th	April 2009
53	137th	April 2007
56	135th	April 2006
60	119th	April 2005

Source: Focus Property Intelligence, February 2010 NB: Data not available for 2008

5.29 In March 2010, 17 requirements for Horsham were identified including one department store (TJ Hughes), nine other comparison retailers (including The Blue Cross, Card Factory, Sportec, Gerry Weber, PamPurredPets, Lakeland Ltd, Sussex Bed Centre, Peacocks and Desire by Debenhams). The remaining seven requirements are from service operators (including Millie's Cookies, Café Nero, Rush Hair, Headmasters, Café Rouge, Frankie & Benny's and an unnamed insurance firm). We also understand from the Council that both Ask and Carluccio's will soon be opening new restaurants in the centre.

5.30 There are currently no requirements for convenience goods floorspace in the centre, however this may not be truly representative as the main grocery retailers rarely register their requirements on the national database because of competition for sites. In total, operators require between 6,670 and 21,786 sqm gross of retail floorspace in Horsham (Table 5.4). A detailed list of requirements is included in Appendix 2B.

Table 5.4: Horsham Retailer Requirements

Retail Category	No. of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Convenience	0	-	-
Comparison	10	5,718	19,974
Service	7	952	1,812
TOTAL	**17**	**6,670**	**21,786**

Source: Focus Property Intelligence, March 2010

Retail Rents & Yields

5.31 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of a centre (although factors such as the availability of floorspace have an impact on rental value). In 2009, Prime Zone A retail rents in Horsham were recorded at the lowest level since 1997 when they were previously £861 per sqm. Since 1997 rents in Horsham gradually increased, reaching £1,023 per sqm in 2001. Notwithstanding the dip experienced between 2002 and 2003, rents had since remained relatively static at £1,130 since 2006. The recent decline in the economy is expected to have been instrumental in the 23.8% fall in Prime Zone A rent between 2008 and 2009 which is consistent with national trends.

Table 5.5: Prime Zone A Rents in Horsham

2001	2002	2003	2004	2005	2006	2007	2008	2009
£1,023	£969	£969	£1,023	£1,076	£1,130	£1,130	£1,130	**£861**

Source: Colliers CRE, 2009

5.32 Valuation Office data highlights that yields in Horsham have remained relatively static at either 5.5% or 5.25% since 2000. This suggests that despite recent economic instability, the centre has continued to perform well and maintained reasonable investor confidence.

Accessibility

5.33 Horsham is well connected to the local and primary road network. The A24 bypasses the town to the west which links the centre with Dorking to the north and Worthing to the south. The A24 also provides links to Crawley and the M23 via the A264 which lies to the north of Horsham's urban area. Horsham also benefits from good public transport provision. Bus services connect the whole of the District and reach most of the small villages. There are also hourly buses to Brighton, East Grinstead, Gatwick, Guildford and Worthing.

5.34 Horsham train station is located on North Street within walking distance of the main shopping area in the town centre. Horsham is located on the major rail network with direct links to key destinations including London Victoria and Gatwick Airport.

5.35 There are a number of car parks in and on the edge of the town centre, both multi-storey and surface. In total there are approximately 2,242 spaces within the town centre, all within easy walking distance of the shops. There is also some on-street pay & display parking provision in the more secondary shopping areas. Parking charges and conditions as to when charges apply vary across the centre.

5.36 The Council also operate a Park and Ride scheme from the Hop Oast car park situated approximately one mile to the south of Horsham. The Park and Ride costs £1.50 on weekdays and £1.00 on Saturdays, charges apply per car. Season tickets are also available at £80 per quarter. Buses operate Monday to Saturday, with six buses an hour during the peak times in the morning and four buses an hour during the day. The results of the household survey indicates that 89% of visitors to Horsham town centre never use the park and ride whilst just 7% cited that they do. The Council should consider the 'type' of Park and Ride user, including for example shoppers or employees/commuters.

Environmental Quality

5.37 Horsham has a long history, reflected by the narrow paved alleyways and historic medieval buildings which are dispersed throughout the more modern developments adding to the variety of the built environment. Much of the centre, notably Carfax, Market Square, East Street and a portion of West Street, is protected within a conservation area and there are several buildings of listed status. The centre benefits from various walkways and cut-through which add to the quirkiness of the centre however for those that do not know the centre well, overall legibility could be improved through enhanced signage.

5.38 Much of the town centre is pedestrianised (including West Street, Market Square, Carfax, Piries Place, Swan Walk and the Forum), providing a safe and pleasant environment for shoppers. The pedestrianised Carfax is particularly attractive with seating areas, a Victorian band stand and a historic war memorial. The area is well-lit and there is good provision of street furniture and planting which has been well maintained. The Forum provides a more modern piazza that is equally as pleasant and is a popular venue for outdoor events. Although it is somewhat hidden behind units on West Street and only accessible through a narrow, deficient walkway situated between Costa Coffee and the Officers Club.

5.39 Buildings and shop fronts are generally well-maintained and display modern fascias and the Council have remained proactive in maintaining and enhancing the quality of the environment through the implementation of landscaping, street furniture and interesting works of public art. There is further major planned investment to improve the public realm along East Street with works due to commence in Spring 2010. The majority of vacant units have remained in a reasonable condition with only a few exceptions. In some instances, vacant units are being utilised to promote other retail/leisure activities e.g. events at the Capitol, which helps maintain an active frontage.

Customer Views and Behaviour

5.40 The 2010 household telephone survey included a line of questioning on the frequency of visits to Horsham town centre and visitors likes/dislikes about the centre. The key findings are summarised below.

- 74% of residents in the survey area visit Horsham town centre. Of these, the majority (19%) visit the centre once a week whilst 16% visit once a fortnight, 15% visit once a month and 16% visit once every three months. Just 5% visit everyday and 12% visit 2-3 times a week.
- 33% visitors cited the ‘attractive environment’ as what they like about Horsham. 19% cited the ‘good range of chain/well known stores’; 18% cited the ‘good range of independent stores’; and 17% cited ‘close to home’ as features they like about the centre.
- In terms of dislikes, the majority (62%) cited ‘nothing/very little’ although 12% cited ‘lack on non-food stores’; 10% cited ‘difficult to park’; and 5% cited expensive parking.
- 53% indicated that ‘nothing’ would make them visit Horsham more often although 12% cited ‘more department stores’ and 10% cited ‘more non-food stores’. ‘Easier / more parking’ and ‘cheaper parking’ was cited by 9% and 8% respectively and things that would make them visit the centre more often.

5.41 Additional information on customer views and behaviour can be drawn from the results of the in-centre survey of 109 visitors to Horsham was undertaken by Research and Marketing in 2005, as part of the 2005 study. Again, we summarise the relevant key findings below.

- 61% of visitors to the town centre were residents of Horsham, of which 38% worked in Horsham.
- 37% of respondents were day visitors to the centre, neither living nor working in Horsham.
- Non-food shopping was cited as the main purpose of their visit by 37%.
- 17% cited ‘use services’ as the main purpose of their visit whilst work/business purposes were cited by 10%. Only 6% cited food shopping (combined with or without non-food shopping).

- Of those that were shopping in Horsham the majority of intended purchases related to comparison goods (70%) whilst the remaining 30% related to convenience goods.
- 'Close to home/accommodation' was cited as the main reason for choosing to visit Horsham by 65% of respondents. 'Close to work' was cited by 10% and 'good choice/range of shops' was cited by 8%.
- 'Close to home/easy to get to' was also cited as what visitors most like about the centre. 'Choice of shops and services' and 'attractive environment' also featured highly.
- 47% disliked 'nothing' about the centre. 18% dislike the lack of/expensive parking in the centre.
- 40% would shop in Horsham more often if there was a 'better range of shops and services'. 29% cited that ''nothing' would make them shop in the centre more often.
- Over half of visitors travelled to the centre by car as either a passenger or the driver. 22% walked, 9% travelled by bus/coach and 6% travelled by train.
- The centre attracts reasonably high dwell times with 29% of visitors remaining in the centre for 2-3 hours. 29% stay in the centre for between 1-2 hours and 17% stay in excess of 3 hours.

Leisure

5.42 We have identified below average provision of leisure uses in Horsham town centre. However, for a centre of its scale and function, there appears to be a reasonable choice of public houses scattered across the centre at Market Square, Carfax, Bishopric and on the outskirts along Springfield Road and North Street. The centre also offers a relatively good choice of restaurants and there is an obvious restaurant 'quarter' emerging around East Street and Piries Parade. As highlighted previously, this area accommodates several high street chains such as Pizza Express, Strada, Tortellini and Cote Brasserie. There is a new Japanese restaurant 'opening soon' and we understand that Carluccio's and Ask will also soon be opening new outlets in this part of the centre.

5.43 The centre's cinema provision is included within 'The Capitol' complex located on North Street. The facility is within walking distance of the main shopping area and the train station and offers a theatre, two cinema screens, a studio, gallery space, café and lounge bar. There is also a ten-pin bowling and laser quest facility within walking distance of the central shopping area. The Big Apple Superbowl is located off Albion Way and includes a late night bar, café and pool facilities.

5.44 In terms of pubs/clubs, it is evident from the results of the household survey that 21% of people from the survey area visit Horsham most often for this type of social entertainment. This compares to 19% visiting Crawley, 8% visiting Dorking, 4% visiting Reigate and 3% visiting Brighton and Horley respectively. Within Horsham's zone (Zone 8), 78% of people visit Horsham town centre most often for pubs/clubs. The centre also draws attracts a high proportion of residents from the immediate surrounding zones, Zones 3 (67%), 6 (21%), 7 (33%) and 10 (17%). Respondents are almost certainly referring to public houses, given the absence of nightclub provision in the town centre. Other respondents in location Zone 8 travel elsewhere to Central London (5.6%), Brighton (3.7%) and Worthing (1.9%) amongst 'other' locations.

5.45 Similar to the above, the results of the household survey indicate that 22% of people from the survey area visit Horsham most often for restaurants/eating out compared to 17% visiting Crawley, 8% visiting Dorking, 5% visiting Reigate and 3% visiting Brighton, Central London and Worthing respectively. As we would expect, Horsham attracts the greatest proportion of people from its location zone, Zone 8 (77%), and adjacent Zone 3 (76%). The centre's restaurant offer also attracts a reasonable proportion of residents from other surrounding zones: Zone 6 (28%), 7 (39%), 10 (26%) and 13 (11%); and extends beyond the District boundary drawing 16% from Zone 2 and 11% from Zone 5.

5.46 In terms of cinemas, The Capitol attracts 14.3% of people from the survey area whilst 54% most often visit the Cineworld in Crawley. The latter is a 14-screen multiplex which can therefore offer a more extensive choice of films than the two screens at The Capitol. It is evident from the survey results that residents within the survey are prepared to travel a further distance for such choice. Even in the most southern zones, the Cineworld in Crawley attracts 32% from Zone 11, 27% from Zone 12 and 29% from Zone 13; whilst The Capital draws 12%, 11.5% and 21% from the same zones respectively despite it being the nearest cinema in proximity.

5.47 It is evident that Crawley is also more popular in terms of ten-pin bowling. The Hollywood Bowl at Crawley Leisure Park attracts 62% of residents in the survey area compared to 24% that visit The Big Apple in Horsham. However closer analysis shows that The Big Apple has a reasonably strong influence over the majority of zones within the District including those within reasonable proximity to Crawley. For example, it attracts 61% and 70% of people from Zones 3 and 8 compared to 39% and 30% that visit Crawley.

5.48 We have not identified any bingo facilities in Horsham town centre however just 0.5% of residents cited bingo as a leisure facility lacking within reasonable distance of their home, suggesting there is limited demand for this type of facility, consistent with national trends. It is evident from the survey that those that do use bingo facilities will travel to alternative destinations, the most popular being Gala Bingo in Crawley (79%); 10% visit the Gala Bingo in Worthing and 4% visit the Gala Bingo in Brighton. The small remainder visit 'other' destinations like Bognor Regis.

5.49 Our analysis highlights that Horsham has a relatively good range of commercial leisure facilities on offer. There is also scope to harness certain elements such as the restaurant 'quarter', to further enhance the existing offer. It is evident that Crawley is the main competing destination which influences leisure choices across the extent of the District, whilst other destinations such as Dorking, Worthing, Brighton, and Central London are less influential. Crawley is particularly prominent in terms of cinema and bowling provision as residents are more inclined to travel further distances to use enhanced facilities at the Crawley Leisure Park.

Strengths, Weaknesses, Opportunities, Threats

5.50 We have prepared a detailed SWOT analysis for the town centre which is set out in Appendix 2C. In summary, Horsham has numerous strengths particularly in terms of its physical characteristics and the composition of town centre uses. The centre offers a good mix and range of shopping and leisure activities and draws a high proportion of residents living within the District (74%) demonstrating its strength and influence over the District.

5.51 There is scope to further enhance the centre's offer, particularly in terms of the niche, boutique retail market which will help continue to differentiate Horsham from other town centres, particularly Crawley. There is also scope to improve legibility and create distinct quarters reflecting different areas of activity in the centre. Swan Walk is another area where there is potential for enhancement. Springfield Court is evidently struggling in terms of vacancies and low footfall and would benefit from change and further investment to improve the attractiveness of available floorspace to retailers. Given the constrained physical environment and surrounding road network, there are few clear opportunities to expand the centre's retail core to accommodate new retail development or create larger format units. This is discussed in more detail in our Conclusions and Recommendations.

Billingshurst

5.52 Billingshurst is located approximately six miles to the south west of Horsham town centre on the A272. Billingshurst is characteristic of a small village centre with several shops distributed along the traditional High Street. Part of the main shopping provision is provided within a small purpose-built shopping precinct, Jengers Mead, situated to the west of High Street. The entire village is located within a conservation area and subject to polices which generally restrict development unless the character of the area is preserved and, where possible, enhanced.

5.53 The following analysis draws upon the most recent Experian Goad survey (August 2007) and our own detailed audit of the centre undertaken in March 2010. Tables 5.6 and 5.7 set out the retail composition in Billingshurst in terms of the number of units and floorspace according to Experian Goad.

Table 5.6: Billingshurst Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	8	12.31	8.83	3.48
Comparison	21	32.31	33.95	-1.64
Service	32	49.23	45.83	3.40
Vacant	4	6.15	11.22	-5.07
Total	**65**	**100**	**100**	**-**

Source: Experian Goad Category Report, August 2007

Table 5.7: Billingshurst Retail Composition by Floorspace

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	1,524	22.25	13.82	8.43
Comparison	1,802	26.32	37.62	-11.30
Service	3,019	45.10	38.83	5.27
Vacant	502	7.33	9.59	-2.27
Total	**6,847**	**100**	**100**	**-**

Source: Experian Goad Category Report, August 2007

5.54 It is evident that the centre has above average provision in terms of convenience and service uses but below average comparison retail provision. In 2007, the vacancy rate in terms of the number of units and floorspace was below average; but as highlighted below, this has changed significantly.

5.55 The results of our site visit in March 2010 show that since 2007, two previously vacant units are now occupied, one by a Chinese restaurant and the other by an events management company. The remaining two units are still vacant and we identified nine additional vacant units which have arisen since the previous survey. This amounts to 11 vacant units in total, which is a significant increase to the four previously identified. This equates to a vacancy rate of 16.92% which is 7.16% above the national average.

5.56 Five of the newly identified vacant units were formally occupied by comparison retailers. In addition, two other units previously occupied by retailers in the comparison goods category are now occupied by service operators. Our recent audit identified 14 comparison retail units in the centre which, whilst below average (-7.99%), is not wholly unusual for a centre of this scale and its position in the retail hierarchy. It does however indicate that the centre is no longer functioning as it once was. The current comparison retail offer is generally limited and includes a hardware store, florists, a chemist, a crafts shop, shops selling home furnishings and trinkets, a sports wear store and a small cluster of charity shops.

5.57 The main convenience operator in the centre is Budgens which occupies a modern retail unit (c.567 sqm net) which benefits from dual frontage directly onto the High Street as well as to the car park at the rear of the store. The remaining seven convenience retailers in the centre include two bakeries, a butcher, two newsagents, an off licence and a greengrocer. This is a good range of provision for a centre of this scale.

5.58 Billingshurst also offers a good range of key services including several banks, a post office, dry cleaners, optician and several hair and beauty salons. There is also a reasonable offer in terms of public houses, restaurants and take aways. The latter are generally located within Jengers Mead where they do not detract from the village qualities of the traditional high street. Other services include several estate agents located on High Street, a solicitors, an undertakers and a building supplies firm.

5.59 Budgens is one of the main multiple retailers in the centre. Other multiples include Martins newsagents, Lloyds Pharmacy, Help the Aged charity shop and three high street banks (Natwest, Barclays and Lloyds).

There are also several multiple estate agent operators although the majority of outlets in the centre are occupied by independents.

5.60 As highlighted above, there are a high number of vacant units in the centre at present. Vacant units are broadly distributed across the centre and vary in size. There are four vacant units at Jengers Mead, the largest of which is c.225 sqm gross, formally occupied by Artistaquatics. On High Street there is a small concentration of units adjacent to Natwest which appear to have been refurbished. Whilst still vacant at the time of our site visit, this does offer some evidence of investment in the centre. We also understand from discussions with the agent letting the units that one unit has now been let.

5.61 We have identified just one requirement for Billingshurst from The Original Factory Shop which sells discount brands and seconds originally made for other High Street retailers or supermarkets. This retailer is currently seeking between 204 sqm up to 438 sqm floorspace in Billingshurst. As highlighted above, there are current vacant units in the centre which would be suitable to accommodate these needs.

5.62 The centre is characteristic of a village centre and has harnessed many of these qualities. Despite being an obviously more modern development, the scale and design of the Budgens store is considerate of the more traditional architecture of neighbouring buildings on the High Street and in keeping with the village and the wider conservation area. The shopping environment is generally pleasant although the post-modem precinct-style development at Jengers Mead is less considerate of the otherwise pleasant and traditional rural setting. Notwithstanding the dated architecture of Jengers Mead, the environment here is pleasant with provision of street furniture and landscaping. Overall the centre is clean and well-maintained.

5.63 Billingshurst is situated within a large residential area to the south east of Horsham and outside the urban envelope the wider surrounds are predominantly rural. The High Street is the main road through the centre which provides links via the A272 to the A29 and the wider road network. The main parking provision is located at Jengers Mead and to the rear of the Budgens. Billingshurst railway station is located south of the centre, approximately 15-20 minutes walk. There is a bus service (No. 101) which links Billingshurst station to the centre however this service only runs once an hour.

5.64 The limitations of local public transport are reflected in the results of the household survey which indicate that just 7% of people travel to Billingshurst by bus. Instead the majority (73%) travel by car/van, 19% walk and less than 1% travel by train or bicycle. In comparison with the proportion of visitors that travel by car, the proportion of those that choose to walk to the centre is very low. This has potential to cause concern over the influence of any new, competing retail provision in the area which may divert car-borne trade from the centre, influenced by the ease of car parking options, and potentially impact its vitality and viability.

5.65 Billingshurst station sits on the Southern Line which operates between Horsham and Bognor Regis and is considered within the commuter belt for both London and Brighton. Around the station there are some local facilities including a new Tesco Express and several take-away outlets. The Tesco Express is small and cramped and likely to be functioning predominantly as a top-up food destination for commuters and local residents in the vicinity. The station area is physically constrained by the railway infrastructure and surrounding residential area which suggests there is limited scope to expand the current facilities on offer here. There are some light industrial warehouse units adjacent to the station which could pose an opportunity dependent on their current function and connection with the operation of the station.

5.66 The household survey highlights the main reason(s) that people choose to visit Billingshurst for their shopping and service needs. The centre being 'close to home' is cited by 33%, whilst 27% cited the good range of services and 20% cited the good range of independent stores. In terms of frequency of trips, the survey indicates that 11% visit every day whilst 20% visit 2-3 times a week, 15% visit once a week and 20% visit once a fortnight. Reflecting the reasons for visiting Billingshurst, 28% cite close to home as what they like about the centre. 17% like the good range of independent stores, 10% like the attractive environment and 6% like good and / or free parking.

5.67 Conversely, 27% cited cheaper or easier / more parking as something that would make them visit Billingshurst more often. 23% cited more non-food stores, 13% cited more food stores and 12% cited more specialist/unusual shops suggesting some qualitative demand for improved shopping provision in the centre. Over half those that shop in Billingshurst use the Budgens most often whilst less than 10% use the Tesco Express at the station. Interestingly 38% use neither which highlights that Billingshurst is not solely functioning as a convenience shopping destination.

5.68 Overall Billingshurst is functioning reasonably well as a village centre meeting the local shopping and service needs of the surrounding residential area. The centre has evidently declined since 2007 in terms of its comparison retail offer and the number of vacant units has more than doubled in three years. Furthermore, land to the east of Billingshurst has been short-listed as a strategic opportunity site with potential to accommodate significant new housing development which would exert some additional pressure on existing facilities in the centre and gives rise for the need to consider additional provision to meet both existing and future needs.

Southwater

5.69 Southwater is located to the south of Horsham town centre off the A24 and in close proximity to the main road network. Since the previous study in 2003, the planned redevelopment of the new Village Centre has been completed and the new facilities were formally unveiled in December 2006. The new Village Centre, Lintot Square, comprises 19 units in total. The retail composition of these units is set out in Table 5.8.

5.70 It is evident that there is below average representation from retailers in the convenience goods category. The Co-op Community Store (515 sqm net) is the only convenience store in the centre although there is also a Londis just outside the centre fronting onto Worthing Road. There is also a weekly market every

Friday between 4pm and 9pm which sells a range of fresh local produce including bread, fruit and vegetables and cakes.

Table 5.8: Southwater Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	1	5.26	8.83	-3.57
Comparison	7	36.84	33.95	2.89
Service	11	57.89	45.83	12.07
Vacant	0	0.00	11.22	-11.22
Total	**19**	**100**	**100**	**-**

Source: GVA Grimley, March 2010

5.71 Southwater has good provision of comparison retail and key services and there are presently no vacant units. The comparison retail offer includes some specialist retailers including two cycle shops and a bespoke model shop. There is also a Boots pharmacy, a florist, gift shop and a pet shop.

5.72 Key local services include a post office, Natwest bank, dry cleaners and hairdressers. There is also a reasonable range of eating and drinking options including the Lintot public house, a coffee shop, an Indian restaurant and two fast food take-aways. In addition to the retail and service elements of the complex there is also a variety of other uses including a Library, youth centre, doctors surgery and a vets. There is commercial office floorspace which accommodates the Community Police and Parish Council offices amongst other private businesses.

5.73 The centre is an attractive modern development which suits the immediate residential and rural surrounds. The centre is clean and well maintained and shop fronts are modern and in keeping with the design of the centre. Shops front onto the wide pedestrianised squares and there is clear signage and a centre map showing the location of different uses. There is good provision of street furniture, including an interesting dinosaur sculpture, as well as trees which contribute towards an overall pleasant shopping environment.

5.74 Like Billingshurst, the Southwater area is essentially a large residential development situated on the outskirts of Horsham. The centre is directly accessible from Worthing Road which is the main link road running down the west of the built up envelope which connects to the A24, one of the main arterial roads in this part of the South which runs between Worthing and Leatherhead. Worthing Road links directly to the A24 at the north of the Southwater urban area and via Mill Straight at the south. There is a dedicated car park serving the centre although at the time of our site visit there were cars queuing for spaces and we understand this is a common occurrence which suggests that existing provision is at full capacity.

5.75 There is no train station directly serving the centre and buses between Horsham and Southwater operate every hour or less. The limited availability of public transport is reflected in the survey results which indicate that 77% of visitors to the centre travel by car / van, 19% walk and just 2% travel by bus.

5.76 The household survey highlights the main reason(s) that people choose to visit Southwater for their shopping and service requirements. The centre being 'close to home' is cited by 30%, whilst 25% cited the good range of services. Other reasons which featured highly include good range of independent stores (10%), good range of chain / well known stores (10%), attractive environment (7%), restaurants / cafes (6%) and easily accessible by foot / cycle (5%). In terms of what they like about the centre, 28% like the attractive environment, 18% like the good and / or free car parking, 16% like that it is close to home and 12% like the good range of independent stores.

5.77 In terms of frequency of trips, the survey indicates that 10% visit Southwater every day whilst 16% visit 2-3 times a week, 13% visit once a week and 7% visit once a fortnight. The majority of visitors, 23%, visit once a month. When asked what would make them visit Southwater more often 80% cited nothing, 6% cited more specialist/unusual shops and more places to eat/drink and 5% cited more non-food stores.

5.78 In February 2010, the Council confirmed that 'Land West of Southwater' is on the short-list of potential strategic sites identified for significant housing-led development. The Council will now undertake further work in order to ascertain whether the area is appropriate and deliverable for inclusion in the preferred strategy. The initial proposals for the area include development of 2,750 new homes, a primary school, a secondary school, community sports facilities, open space and a link road to the Hop Oast roundabout. The delivery of this level of growth will exert some additional pressure on existing facilities at Lintot Square and give rise for the need to consider additional provision to meet any needs arising.

5.79 In summary, the centre is an attractive and well-planned development which is currently performing well in terms of the PPS4 health check indicators. There are no vacant units and the centre was busy and bustling at the time of our site visit suggesting that the centre is at or near to full capacity. The environment is of a high quality and well maintained and there is a good range of retail and key services on offer to fulfil the needs of the local resident population. There is limited scope for expansion and it is possible that potential population growth will put further pressure on local facilities and affect the adequacy of provision to meet future needs.

Edge/Out-of-centre Retail Provision

Comparison

5.80 In terms of edge/out-of-centre provision, Horsham has a small range of retail warehousing located within the north of the District as illustrated by Plan 9. There are three retail parks:

- **Tan Bridge Retail Park** is located at the junction of Albion Way with Worthing Road, in close proximity to the Sainsbury's foodstore. The retail park comprises two units occupied by Staples and Currys.

- **Foundry Retail Park** is situated to the north of Horsham station on the corner of Kings Road and Foundry Lane. There are two retail units here, including one occupied by Dreams.
- **Broadbridge Heath Retail Park** is located to the west of Horsham town centre, just south of the major intersection between the A24 Horsham bypass and the Guildford Road. Units here are occupied by Carpetright, Halfords and Homebase.

5.81 In addition to Tan Bridge Retail Park there is also a Pets at Home and Majestic Wine warehouse on East Street just outside Horsham town centre.

5.82 The household survey indicates that Broadbridge Heath is the most popular destination for DIY and decorating goods, drawing 23% from the survey area. It is generally less popular in terms of the other comparison goods categories, although this is a reflection on the type of retailers represented. Reflecting the type of goods on offer, Tan Bridge Retail Park only features in the household telephone survey under the comparison retail categories for domestic appliances and electrical goods. The Foundry Retail Park does not feature very highly on the survey results, although this is again a reflection on its more limited retail offer.

5.83 Plan 9 illustrates the location of competing retail warehouse provision outside the District. It is evident from the survey results that these retail parks and standalone units are also drawing some trade from the survey area. County Oak Retail Park in Crawley for instance is particularly popular in terms of domestic appliances, small electrical items and furniture, floor coverings and household textiles, and draws a reasonable share of expenditure from the north of the District (Zones 3, 6, 7 and 8). The overall influence of other retail warehouse provision outside the District is marginal in comparison.

Convenience

5.84 Horsham has two major out-of-centre foodstores: the Tesco Extra at Broadbridge Heath and the Sainsbury's at Pulborough.

5.85 The Tesco Extra, Broadbridge Heath is located approximately 1.5 miles to the west of Horsham town centre. It is conveniently located between the A24 and the A264 and visible from the main road network. The store opened in 1986 and has a retail floorspace of approximately 3,555 sqm net. The store is open 24 hours and offers the full standard range of convenience goods including a delicatessen, meat and fish counters, bakery and hot food counter. Non-food items on sale include the Tesco clothing range, household goods, electronics and health and beauty items. There is also pharmacy, an in-store café and a petrol station on site.

5.86 The Sainsbury's is located on the A29 (Stane Street) approximately two miles to the north of Pulborough and three miles to the south-west of Billingshurst. The store opened in 2000 and has a floorspace of 1,414 sqm net. The store is open between 7:00am and 8:00pm Monday-Saturday and 10:00am until

4:00pm on Sunday. The store offer includes a wide range of convenience goods and there is a deli, bakery and fish counter.

5.87 Other out-of-centre convenience floorspace in the District generally comprises small-scale convenience stores, as illustrated on Plan 10.

Summary

- Our detailed qualitative analysis of Horsham town centre and the village centres of Billingshurst and Southwater indicates that, at present, the centres are all functioning well and in accordance with their respective positions in the retail hierarchy.
- Horsham town centre is the main centre in the District and the focus for higher-order comparison retail shopping and leisure activities. The centre performs well against the majority of the key PPS4 health check indicators and its strengths clearly outweigh identified weaknesses. There are however clear opportunities to further strengthen the centre's offer, particularly in terms of its evening economy, its specialist/independent retail offer, legibility and revitalisation of Springfield Court in the Swan Walk shopping centre. There is limited physical opportunity to expand the retail core, therefore it will be important for the Council to maintain and, where possible, enhance the retail core and complementary areas to ensure the on-going vitality and viability of the centre.
- Billingshurst is functioning reasonably well as a village centre however the centre has evidently declined since the previous study and the level of vacancies has more than doubled. Given potential new housing development to the east of Billingshurst, and the recent loss of businesses, it will be necessary to consider the future role of the centre in meeting existing and future needs.
- Southwater is currently performing well against the PPS4 indicators and in accordance with its role as a village centre. There are no vacant units and the centre was busy at the time of our site visit suggesting that it is close to capacity. There are some limitations in terms of public transport accessibility, parking provision and limited scope for expansion. It is possible that Southwater will experience significant local population growth and it will be necessary for the Council to consider the implications of increasing pressure on existing facilities. The options are discussed in greater detail in our conclusions and recommendations.
- The main out-of-centre retail provision in the District is limited to three retail parks and a single standalone retail warehouse unit. There are large out-of-centre supermarkets; Tesco, Broadbridge Heath and Sainsbury's, Pulborough which contribute towards the overall convenience shopping provision in the District. .

6. CAPACITY PROJECTIONS

6.1 In this section we estimate the current performance of retail provision in Horsham as the basis for forecasting the need for additional retail floorspace to the period 2026, incorporating the interim years of 2015, 2020 and 2025. The capacity tables accompanying this assessment are attached in Appendices 3 and 4.

6.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns to model the existing flow of available expenditure to Horsham's centres (specifically Horsham, Billingshurst and Southwater) and identified out-of-centre retail provision. In order to develop the baseline position, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Horsham catchment area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis that the household telephone survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
- Compared to the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.

6.3 Building on the baseline position, we have explored the capacity for further convenience and comparison goods retail floorspace within the District.

Data Inputs

Survey Area and Household Survey

6.4 In order to provide detailed factual information on shopping patterns in the District, we commissioned a new household telephone survey covering 1,000 households. GVA Grimley designed the survey questionnaire in consultation with Horsham District Council and NEMS Market Research Company – who undertook interviewing and data processing in February 2010. The survey area is shown on Plan 1 and the full survey results are provided in Appendix 5.

6.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as "internet/mail order shopping", to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included questions on main foods and top up foods shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type.

6.6 For food we used a 75%/25% food/top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey Zone. The survey also includes seven questions on specific comparison goods types, which coincides with Experian Business Strategies definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita spend on that goods type. This process establishes pattern of residents spending for each Zone in terms of the following types of goods:

- clothing and footwear;
- furniture, floor coverings and household textiles;
- DIY and decorating supplies;
- domestic and small electrical appliances (tv, hi-fi, radio, etc);
- personal goods (jewellery, glassware, books, stationary, gardening and pet related products);
- recreational and sporting goods.

Estimates of Population in the Survey Area

6.7 Population estimates and forecasts were drawn from the Experian e-marketer in-house system. This provides estimates of population based on trendline projections and the 2001 census for small, localised areas. Overall, the population of the survey area within Zones 1-14 is currently 328,381. It is forecast to grow to 340,866 by 2015, 354,076 by 2020, 368,674 by 2025, and 371,811 by 2026 (Table 1, Appendix 3). Overall, the population is forecast to grow by 13% between 2010 and 2026 within the whole survey area.

Available Expenditure in the Survey Area

6.8 The Experian e-marketer system provides estimates of the per capita expenditure for convenience and comparison goods in 2008 prices. We have made deductions for special forms of trading (SFT) which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping based on the most up to date information provided by Experian. We have applied individual per capita expenditure figures across each survey Zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.

6.9 As explained in Section 3, we have applied growth rates for comparison goods of 1.1% for the period 2008 – 2009; -0.1% for the period 2009 to 2010; 2.3% from 2010 to 2015; and 4.7% from 2015 onwards. For convenience goods we use growth rates of -0.5% per annum between 2008 and 2009; 0.1% between 2009 and 2010; 1% for the period 2010 to 2015; and 0.5% per annum from 2015 onwards. We expect more growth will take place on comparison goods as opposed to convenience goods as the scope to purchase more food is more limited than the scope to purchase non-food goods. These assumptions take into account current economic circumstances and the recession and demonstrate the levels of growth expected as a consequence over the period to 2026.

6.10 Taking these considerations into account, we have generated expenditure by Zone to highlight variations across the survey area and grown them accordingly to 2015, 2020, 2025 and 2026; 5 year forecasting periods as required by PPS4. Table 2, Appendix 3, applies per capita expenditure within each Zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £634.7m. This is forecast to grown to £685.2m by 2015; £726.7m by 2020; £774.3m by 2025 and finally to £783.8m by 2026. This equates to an overall growth of £149.1 (23%) between 2010 and 2026 (Table 3, Appendix 3).

6.11 Table 3, Appendix 4, sets out the total available comparison goods expenditure within the survey area by again applying per capita expenditure within each Zone to population forecasts. This indicates that total available expenditure within the survey area is currently £963.5m. This is forecast to grow to £1,092m by 2015; £1,426m by 2020; £1,869m by 2025 and finally to £1,973m by 2026. This equates to an overall growth of £1,010m (105%).

Floorspace Data

6.12 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), Horsham District Council, the Trevor Woods retail warehouse database and Experian Goad town centre category reports. Our floorspace assumptions for the foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. These accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Shopping Patterns

6.13 Large foodstore provision in the District includes the Sainsbury's, Worthing Road and Waitrose, Pirie's Place, both in Horsham Town Centre; the Sainsbury's, Stane Street near Pulborough; and the Tesco Extra at Broadbridge Heath Retail Park. Plan 10 illustrates the location of convenience stores across the District. There is also a new Waitrose in Storrington, although this store has only recently opened and its usage has therefore not been identified within the household survey.

6.14 Overall, the District's foodstores draw 34% of available convenience goods expenditure in the survey area (Zones 1-14). We have, however, also reviewed the shopping patterns of those residents living within the

Zones largely falling within the District boundary (Zones 3, 6, 7, 8, 10, 11, 12 and 13). This enables us to review the main flows of food shopping trips and the competition arising between town centre and out-of-centre foodstores both within and beyond the District. The findings are included within Appendix 3 (Tables 4-31) and Table 6.1 below. It is evident that the District currently retains approximately 70% of available convenience goods expenditure within its zones. This is a particularly strong level of retention and indicates only marginal leakage of trade to competing provision.

Table 6.1: Convenience Good Market Share

	Zone 3	Zone 6	Zone 7	Zone 8	Zone 10	Zone 11	Zone 12	Zone 13
Retained Expenditure (£m)	47,154	12,731	23,053	55,317	8,572	12,395	16,438	10,526
Market Share (%)	82%	76%	84%	85%	69%	34%	62%	41%

Source: Household Telephone Survey, February 2010

6.15 Foodstores in Zones 3, 6, 7 and 8 in the north of the District retain 80% of available expenditure in these zones. This reflects the strength of foodstores located in this part of the District which include the Sainsbury's and Waitrose in Horsham town centre, the Tesco at Broadbridge Heath and stores in Billingshurst and Southwater. Stores in Zones 10 and 11 within the south-east of the District retain 34% of available expenditure and those within Zones 12 and 13 retain 24% of available expenditure. This indicates that there is a level of expenditure leakage from within the southern zones and highlights that many residents are travelling outside their location zones to fulfil their food shopping needs.

6.16 Table 6.2 demonstrates the significant influence of the four major foodstores in the District, particularly the Tesco at Broadbridge Heath and the Sainsbury's in Horsham town centre.

Table 6.2: Convenience Shopping Patterns in Horsham District

		Sainsbury's Horsham	Waitrose Horsham	M&S Horsham	Sainsbury's Pulborough	Tesco Broadbridge Heath	Tesco, Shoreham
Zone 3	Main Food	30%	6%	-	-	**52%**	-
	Top Up	21%	7%	3%	-	7%	-
Zone 6	Main Food	2%	-	-	22%	**29%**	-
	Top Up	2%	5%	-	2%	-	-
Zone 7	Main Food	27%	-	-	-	**59%**	-
	Top Up	5%	-	-	-	16%	-

		Sainsbury's Horsham	Waitrose Horsham	M&S Horsham	Sainsbury's Pulborough	Tesco Broadbridge Heath	Tesco, Shoreham
Zone 8	Main Food	**53%**	19%	3%	-	19%	-
	Top Up	25%	14%	11%	-		-
Zone 10	Main Food	**53%**	3%	-	-	28%	-
	Top Up	6%	-	-	-	2%	-
Zone 11	Main Food	-	-	2%	-	2%	**40%**
	Top Up	2%	-	-	-	-	2%
Zone 12	Main Food	11%	3%	-	8%	**18%**	5%
	Top Up	-	2%	-	2%	-	2%
Zone 13	Main Food	5%	3%	-	**23%**	5%	-
	Top Up	2%	-	-	14%	-	-

Source: Household Telephone Survey, February 2010

6.17 Overall the survey identifies very little leakage of convenience expenditure from the District's Zones. The only exception is Zone 11 in the south of the District, where 40% of residents are drawn to the Tesco Extra, Holmbush Farm in Shoreham for their main food shopping. This store is located approximately seven miles from Steyning and is easily accessible via the major road network (A283/A27).

6.18 There is less leakage of expenditure to Shoreham for top-up food shopping as the survey shows that residents in Zone 11 generally use local shops in Henfield or Steyning for this purpose. Similarly, residents in Zone 6 generally undertake their main food shopping in Tesco, Broadbridge Heath or Sainsbury's, Pulborough. For top-up food shopping they largely use the Budgens and other local convenience stores in Billingshurst (located in Zone 6).

6.19 The same can be said for the Co-op in Southwater which is predominantly functioning as a top-up food destination for residents living in its location zone, Zone 7 drawing 55% for this purpose; whilst the Tesco at Broadbridge Heath has the greatest draw for main food shopping from this zone (59%) it attracts a much lower proportion for top-up food shopping (16%).

Convenience Goods Capacity Projections

Horsham Town Centre

6.20 Our methodology estimates the overall trade draw of Horsham town centre (located in Zone 8) for convenience goods (Table 20, Appendix 3) based on our examination of the trade drawn to the Sainsbury's, Waitrose and M&S Simply Food as well as 'other' local stores in Horsham which includes any independent delicatessens, grocers, healthfood stores and newsagents etc. We estimate that the Sainsbury's on Worthing Road currently has a convenience goods turnover of £68.1m which is a strong turnover compared to our estimate based on company average (£40.9m). Similarly, we estimate that the Waitrose store in Pirie's Place has a turnover of £19m, which again exceeds our estimate based on company average (£15.2m).

6.21 In contrast, the results of the household survey suggest that the M&S Simply Food in the Swan Walk shopping centre is trading below company average with an estimated turnover of £4.9m compared to £9.7m. It is often the case that the usage of smaller town centre stores can be somewhat underestimated by the telephone surveys which do not pick up passers by, linked trip shoppers, local employees and 'quick stop' shopping trips. We have spoken with M&S about the prospects of a larger Simply Food store separate to the existing M&S and were informed that this would unlikely to be pursued as the preferred format, where possible, is to maintain the Simply Food within the variety store as a complementary offer.

6.22 We estimate that 'other' convenience stores in the centre have a combined turnover of £5.1m. Our qualitative assessment of the centre indicates that 'other' provision includes several quality, specialist retailers including Hoffmans cheese shop, the Country Produce delicatessen and the Forfars Fresh bakery amongst others.

6.23 It is evident from our analysis that the Sainsbury's is the dominant store in the town centre drawing trade from across the District (bar Zone 11) and beyond. The store caters predominantly for main-food shopping although it does also attract a reasonable percentage of top-up shoppers from within its location zone, Zone 8 and adjacent Zone 3. The Waitrose is less dominant and caters evenly for main food and top-up food shopping. The store draws the majority of its trade from Zone 8 whilst its influence over other zones is more limited.

6.24 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, we believe there is capacity to support further convenience goods floorspace in Horsham town centre. Drawing on the latest advice from Experian, we have applied an annual growth in sales efficiency of existing floorspace of 0.4% between 2010 and 2015 and 0.5% between 2015 and 2026. Our projections are summarised in Table 34, Appendix 3, which indicates that by 2015 there will be residual expenditure in the region of £37.6m, which is set to grow to £43.6m by 2020; £50.7m by 2025 and £52m by 2026. It should be noted that long-term projections should be treated with caution given the fact that margins of error increase over longer time periods, and with the recent economic recession, the future is uncertain.

6.25 Table 6.3 sets out our capacity forecasts for Horsham town centre based on an average sales density for a major foodstore operator (£10,000 per sqm net). These figures do not take into consideration any commitments for convenience goods floorspace in Horsham as we understand there are no outstanding developments in the pipeline.

Table 6.3: Projected Residual Expenditure and Capacity in Horsham town centre

	2015	2020	2025	2026
Residual Expenditure (£000)	£37,594	£43,633	£50,695	£51,962
Capacity (sqm net)	3,685	4,172	4,728	4,822

Source: GVA Convenience Goods Capacity Modelling, 2010

6.26 We estimate capacity to support 3,685 sqm net additional convenience goods floorspace in Horsham town centre at 2010. In terms of scale, this is broadly equivalent to the Tesco Extra at Broadbridge Heath (c.3,555 sqm net).

Billingshurst Village Centre

6.27 We have also assessed the trade draw of Billingshurst village centre (Table 35, Appendix 3) based on our examination of the trade drawn to the Budgens on the High Street and 'other' local stores within the village centre. We estimate that the Budgens is currently turning over £5.1m which is a strong performance compared to our estimate based on company average (£3.9m). 'Other' convenience stores in the centre have a combined turnover of £0.9m.

6.28 As previously highlighted, the Budgens is predominantly performing a top-up food shopping role serving a limited, local catchment area comprising Zone 6 (24%) and to a lesser extent Zone 5 (7%). This is considered consistent with the scale and location of the store within a large rural and predominantly residential setting. It is logical that the majority of local residents are choosing to travel further afield to undertake their main food shopping in stores such as the Tesco at Broadbridge Heath and the Sainsbury's in Pulborough where the choice of goods on offer is greater. However, for small top-up shopping, the Budgens is clearly performing a key role towards meeting local needs.

6.29 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, we believe there is some capacity to support further convenience goods floorspace in Billingshurst village centre. Table 6.4 sets out our capacity forecasts for Billingshurst based on an average sales density for a major foodstore operator (£10,000 per sqm net) and based on the average sales density of the discounter food retailers (£4,000 per sqm net). These figures do not take into consideration any commitments for convenience goods floorspace as we understand there are no outstanding developments in the pipeline.

Table 6.4: Projected Residual Expenditure and Capacity in Billingshurst village centre

	2015	2020	2025	2026
Residual Expenditure (£000)	£1,600	£1,910	£2,294	£2,370
Capacity assuming Major Store Operator (sqm net)	157	183	214	220
Capacity assuming Discount/Value Store Operator (sqm net)	392	456	535	550

Source: GVA Convenience Goods Capacity Modelling, 2010

6.30 The above figures are based on constant market share and do not take into account any potential for significant population growth arising from new housing development (in the region of 1,750 dwellings) to the east of Billingshurst. Theoretically it is possible to estimate the amount of convenience shopping floorspace that 1,750 houses could support. The average household size in the South East is predicted to decline over the period to 2026. For the purposes of this assessment we assume that the average household size is 2.3 which is the average level between 2006 and 2021 sourced from the CLG 2006-based Population and Household Projections (March 2009)[17]. We therefore assume that 1,750 new homes will result in approximately 4,025 additional people.

6.31 The estimated expenditure per person on convenience goods in Zone 6 (Billingshurst's zone) in 2010 is £1,920 per person, taking into account projected expenditure growth and deductions for SFT. 4,025 extra people would therefore generate approximately £7.7m of convenience expenditure in 2010. Table 6.5 demonstrates the theoretical amount of convenience goods expenditure generated by this number of additional people in the period over the LDF period.

Table 6.5: Theoretical quantum of Convenience Goods Expenditure generated by housing growth

	2015	2020	2025	2026
Expenditure per Person in Zone 6 (£ per person)	£1,997	£2,039	£2,086	£2,094
Convenience Goods Expenditure generated by 4,025 people (£000)	£8,038	£8,207	£8,396	£8,428

Source: GVA Grimley, 2010

6.32 The next stage in our analysis is to estimate the amount of convenience goods floorspace that would be supported by the identified level of additional convenience goods expenditure. Table 6.6 provides an indication of the quantum of convenience floorspace that could theoretically be supported by a population of 4,025 on the assumption that 100% of the expenditure generated by the new population is retained in Billingshurst. We have also estimated capacity based on an average sales density for a major foodstore operator (£10,000 per sqm net) and based on the average sales density of the discounter food retailers (£4,000 per sqm net).

Table 6.6: Theoretical Convenience Floorspace Capacity for Billingshurst generated by housing growth

	2015 (sqm net)	2020 (sqm net)	2025 (sqm net)	2026 (sqm net)
Mainstream Foodstore	804	821	840	843
Neighbourhood/ Discount Store	2,010	2,052	2,099	2,107

Source: GVA Grimley, 2010

6.33 This indicates that the new population alone could support between 804 and 2,010 sqm net of convenience floorspace by 2015 in Billingshurst. In addition to the identified baseline capacity, this suggests possible scope for between 961 sqm net and 2,401 sqm net of convenience goods floorspace in Billingshurst by 2015.

Southwater Village Centre

6.34 We have also assessed the performance of Southwater village centre (Table 23, Appendix 3) based on our examination of the trade drawn to the Co-op at Lintot Square. We estimate that the Co-op is currently turning over £4.1m which is a strong performance compared to our estimate based on company average (£3.6m).

6.35 Similar to the Budgens in Billingshurst, the Co-op is predominantly performing a top-up food shopping role serving a limited, local catchment area comprising Zone 7 (14%) and to a lesser extent Zone 10 (1%). This is considered consistent with the scale and characteristics of the centre and its setting within a large rural, residential area. It is logical that the majority of local residents are choosing to travel further afield to undertake their main food shopping in stores such as the Tesco at Broadbridge Heath and the Sainsbury's in Horsham where there is a greater choice of goods on offer. However, for smaller top-up shopping, the Co-op is clearly performing a key function.

6.36 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, we believe there is some capacity to support further convenience goods floorspace in Southwater village centre. Again, like Billingshurst, we have projected capacity for Southwater based on an average sales density for a major foodstore operator (£10,000 per sqm net) and based on the average sales density of the discount food retailers (£4,000 per sqm net) (Table 6.7). These figures do not take into consideration any commitments for convenience goods floorspace as we understand there are no outstanding developments in the pipeline.

[17] South East England Regional Assembly

Table 6.7: Projected Residual Expenditure and Capacity in Southwater village centre

	2015	2020	2025	2026
Residual Expenditure (£000)	£898	£1,186	£1,518	£1,580
Capacity assuming Major Store Operator (sqm net)	88	113	142	147
Capacity assuming Discount/Value Store Operator (sqm net)	220	283	354	366

Source: GVA Convenience Goods Capacity Modelling, 2010

6.37 The above figures are based on constant market share and do not take into account any potential for significant population growth arising from new housing development (in the region of 2,750 dwellings) to the west of Southwater. Adopting the same approach outlined above for Billingshurst we assume that 2,750 new homes will result in approximately 6,325 additional people. The estimated expenditure per person on convenience goods in Zone 7 (Southwater's zone) in 2010 is £1,889 per person, taking into account projected expenditure growth and deductions for SFT. 6,325 extra people would therefore generate approximately £11.9m of convenience expenditure in 2010.

6.38 Table 6.8 demonstrates the theoretical amount of convenience goods expenditure generated by this number of additional people over the period up to 2026.

Table 6.8: Theoretical quantum of Convenience Goods Expenditure generated by housing growth

	2015	2020	2025	2026
Expenditure per Person in Zone 7 (£ per person)	£1,965	£2,006	£2,052	£2,060
Convenience Goods Expenditure generated by 6,325 people (£000)	£12,429	£12,688	£12,979	£13,030

Source: GVA Grimley, 2010

6.39 Table 6.9 provides an indication of the quantum of convenience floorspace that could theoretically be supported by a population of 6,325, on the assumption that 100% of the expenditure generated by the new population is retained in Southwater. Again this is based on an average sales density for a major foodstore operator (£10,000 per sqm net) as well as on the average sales density of the discount food retailers (£4,000 per sqm net).

Table 6.9: Theoretical Convenience Floorspace Capacity for Southwater generated by housing growth

	2015 (sqm net)	2020 (sqm net)	2025 (sqm net)	2026 (sqm net)
Mainstream Foodstore	1,243	1,269	1,298	1,303
Neighbourhood/ Discount Store	3,107	3,172	3,245	3,258

Source: GVA Grimley, 2010

6.40 It is evident that the new population alone could support between 1,243 and 3,107 sqm net additional convenience goods floorspace by 2015 in Southwater. In addition to the identified baseline capacity, this suggests possible scope for between 1,331 sqm net and 3,327 sqm net of convenience goods floorspace in Southwater by 2015. It is necessary to consider the implications of this level of population growth on existing facilities and the potential for additional provision that will adequately meet future needs. This is discussed in more detail in our conclusions and recommendations.

Global Capacity

6.41 Taking into account the performance of all existing foodstores across the District, including both in-centre and out-of-centre stores, and based on an average sales density for a major foodstore operator (£10,000 per sqm net), we project ***global*** capacity to support 9,234 sqm net additional convenience goods floorspace by 2015; increasing to 10,231 sqm net by 2020, 11,401 sqm net by 2025 and 11,604 sqm net by 2026. This does not factor in any committed floorspace, nor does it allow for any change in shopping patterns following the replacement of the Somerfield store in Storrington with a larger Waitrose store which will have absorbed some of this capacity.

6.42 The estimated amount of residual spending to support new floorspace reflects high levels of trade retention across the District.

Comparison Goods Capacity Projections

Horsham Town Centre

6.43 In terms of comparison goods, total available expenditure within the survey area is currently £963.5m, and is forecast to grow to 1,092m by 2015, £1,426m by 2020, £1,869m by 2025 and £1,973m by 2026. This equates to an overall growth of c.£1,009m (104%) between 2010 and 2026 (Table 3, Appendix 4). It is evident that existing provision in the District, predominantly located in Horsham town centre, currently retains approximately 56% (£230.7m) of available comparison goods expenditure within the District (Zones 3, 6, 7, 8, 10, 11, 12 and 13).

6.44 Tables 4 and 5, Appendix 4, indicate the trade draw of Horsham town centre, and Plan 3 illustrates the extent of the town centre's influence throughout the survey area highlighting variations in market share. It is evident that Horsham has a particularly strong core catchment area in the north of the District (Zones 3, 6, 7, 8 and 10); although the centre's overall influence extends further beyond the District boundary and across the entire survey area. Consistent with the proximity of competing centres like Crawley and Worthing, Horsham's influence is reduced in the peripheral zones (e.g. Zones 1, 4 and 14).

6.45 Across the entire survey area, Horsham town centre draws 24% of total available comparison goods expenditure (£229.4m). The majority of this spend comes from Zones 3 (61%), 6 (56%), 7 (60%), 8 (62%)

and 10 (51%). The centre's influence over the north of the survey area is particularly good given the proximity of Crawley. The centre has less influence over the south of the District (Zones 11, 12 and 13) from which it draws 10%, 22% and 20% of available spend from each zone respectively. This is still a reasonable market share and reflects the rather limited provision of similar high-order comparison shopping provision elsewhere in the District and the proximity of competing centres such as Worthing, Brighton and Chichester.

6.46 On the basis of current market shares, we estimate that Horsham town centre will have a comparison goods turnover of £263.1m in 2015, rising to 346.9m in 2020, £459.1m in 2025 and £485.1m in 2026 (Table 5, Appendix 4). Based on an existing comparison goods floorspace of 24,920 sqm net, we estimate that the town centre currently has a comparison goods sales density of £9,204 per sqm net. This is a strong performance as we would usually expect a sales density of £6,500 - £8,000 per sqm for a centre of Horsham's scale and offer. Consistent with the findings of our qualitative health check, this re-emphasises the strength of Horsham's overall performance.

Out-of-centre retail provision

6.47 Out-of-centre retail provision in the District comprises three retail parks (Tan Bridge, Foundry and Broadbridge Heath) and a Pets at Home stand-alone unit. Of the retail parks, Broadbridge Heath has the highest comparison goods turnover (£27.5m) which equates to a sales density of £6,037 per sqm. This exceeds our estimate based on company average which suggests a much lower sales density in the region of £1,574 per sqm net. Closer analysis indicates that the store's turnover is generally derived from the 'DIY and decorating goods', 'furniture, floor coverings and household textiles' and 'domestic appliances' comparison goods categories which is consistent with the type of retailers present. The retail park has a relatively limited influence over the survey area and achieves its highest market shares in Zone 10 (10%), Zone 7 (8%), Zone 3 (7%) and Zone 8 (7%).

6.48 Tan Bridge Retail Park has an estimated turnover of £13.2m which equates to a strong sales density of £9,532 per sqm. Again this above our estimate based on company average which suggests a sales density in the region of £4,357 per sqm net. The two units at the retail park are occupied by Staples and Currys and the presence of these retailers is reflected in the results of the household survey. The retail park also has a relatively limited influence over the survey area and achieves its highest market shares in Zone 10 (9%), Zone 3 (6%) and Zone 8 (4%).

6.49 Foundry Retail Park currently only accommodates Dreams in one of its retail units which has an estimated turnover of £0.6m. Overall the retail park is drawing very little trade from the survey area and its highest market share is just 1% in Zone 13. The Pets at Home unit did not feature in the household telephone survey.

6.50 It is evident from our analysis that existing retail warehousing provision in the District is trading very strongly. The District does not have an excessive amount of retail warehousing provision and there are two vacant units. This does not necessarily indicate lack of demand but may just be a sign of the times and a consequence of a general lack of investment in retail warehousing at present. On this basis we would strongly advise that the bulky goods function of this floorspace is maintained and the Council should resist increasing flexibility over the range of A1 uses permitted in these units.

6.51 Existing tenants include a range of traditional bulky goods retail warehouse operators e.g. Homebase, Halfords, Currys and Staples, which do not compete directly with retailers in the town centre and instead offer a complementary retail offer.

Comparison Goods Global Capacity Projections

6.52 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in sales per sqm net of 1.5% between 2010 and 2015, growing to 2% between 2015 and 2026. Based on the performance of existing floorspace we would expect new quality floorspace to achieve at least £5,500 per sqm net, and have translated residual expenditure into floorspace on this basis. This assessment has assumed that Horsham will maintain its existing market share and we have forecast the capacity for new floorspace in the years 2015, 2020, 2025 and 2026.

6.53 By virtue of growth in population and expenditure we have projected that increases in available comparison expenditure will create global residual expenditure of £19.2m by 2015, £88.7m by 2020, £189.1m by 2025 and £213.1m by 2026. This translates to surplus capacity to accommodate an additional 3,236 sqm net comparison retail floorspace by 2015, growing to 13,565 sqm net by 2020, 26,186 sqm net by 2025 and 28,927 sqm net by 2026 (Table 15, Appendix 4). Table 6.10 demonstrates the breakdown of global capacity arising in the District, and capacity arising specifically in Horsham town centre at 2015, 2020, 2025 and 2026.

Table 6.10: Capacity for additional Comparison Goods Floorspace in Horsham (sqm net)

	2015	2020	2025	2026
GLOBAL	**3,236**	**13,565**	**26,186**	**28,927**
Horsham Town Centre	2,694	11,318	21,855	24,144

Source: GVA Grimley, 2010

Summary

- Capacity forecasts are underpinned by robust survey evidence identifying existing shopping patterns and market share and catchment area of retail provision in Horsham. Capacity projections indicate that the total population of the survey area is forecast to grow from 328,381 in 2010 to 371,811 in 2026 – an increase of 13.2%.

- Existing retail provision within Horsham retains a high level expenditure within the District both in terms of convenience goods (70%) and comparison goods (56%). There is some leakage of trade from zones in the south of the District (Zones 11, 12 and 13) which reflects the proximity of competing provision e.g. Worthing, Brighton and, in terms of convenience goods, the Tesco at Shoreham.

- Horsham town centre is performing very strongly in terms of both convenience and comparison goods shopping. The centre dominates the northern part of the District with a strong convenience goods market share in its location zone, Zone 8 and adjacent zones 3, 7 and 10. Reflecting limited, high order comparison retail provision elsewhere in the District, Horsham town centre has a strong influence in terms of comparison goods shopping. The centre has over 50% market share in each of Zones 3, 6, 7, 8 and 10.

- Consistent with its scale and location, Billingshurst is predominantly performing a local top-up convenience shopping role, led by the Budgens as the main foodstore in the centre. The Budgens is performing well and above company average with an estimated turnover of £5.1m although the store serves a rather limited, local catchment area comprising Zone 6 (24%) and to a lesser extent Zone 5 (7%). We have identified a high level of convenience goods expenditure leaking from Billingshurst's location zone (Zone 6) to other foodstores e.g. Tesco, Broadbridge Heath and Sainsbury's, outside Pulborough. The centre does not have a particularly prominent comparison shopping function.

- Like Billingshurst, Southwater is also mainly performing a local top-up food shopping role led by the Co-op in Lintot Square. The Co-op is performing well and above company average with an estimated turnover of £4.1m. The store serves a limited, local catchment area comprising Zone 7 (14%) and to a lesser extent Zone 10 (1%). It is evident that the majority of residents in Southwater's location zone, Zone 7, are choosing to travel further afield to undertake their main food shopping in larger foodstores (e.g. Tesco, Broadbridge Heath and Sainsbury's, Horsham) where there is a greater choice of goods on offer.

- In terms of out-of-centre provision, the Tesco at Broadbridge Heath is performing well with a strong influence over the north of the District, particularly Zones 3 and 7, where it achieves over 40% market share. The store has a very high turnover, estimated at £74.5m, which is more than double our estimate based on company average sales (£34.3m). In contrast, the Sainsbury's outside Pulborough is less influential. We estimate the store's currently turning over approximately £12.4m which is marginally below our estimate based on company average (£14.1m).

- Our assessment has identified capacity for additional convenience and comparison goods floorspace over the plan period to 2026. In global terms, we project capacity to support in the region of 9,234 sqm net additional convenience goods floorspace by 2015; increasing to 10,231 sqm net by 2020, 11,401 sqm net by 2025 and 11,604 sqm net by 2026.

- In the case of comparison goods, we project global capacity to support 3,236 sqm net additional floorspace by 2015; increasing to 13,565 sqm net by 2020, 26,186 sqm net by 2025 and 28,927 sqm net by 2026. The majority of this capacity is being generated by the strong performance of Horsham town centre.

7. CONCLUSIONS & RECOMMENDATIONS

7.1 Drawing on our qualitative and quantitative analysis, this section considers the key conclusions and policy recommendations moving forwards over the plan period to 2026.

Policy Priorities

7.2 PPS4 states that LPAs should define the extent of their centres and the primary shopping area and consider distinguishing between realistically defined primary and secondary shopping frontages in designated centres accompanied by polices that clearly set out which uses will be permitted in such locations.

7.3 In accordance with PPS4, the primary shopping area (PSA) and shopping frontages are defined in the Council's adopted proposals map. PPS4 defines the PSA as the *'area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage)'*. On this basis, the PSA should include all buildings designated within the primary frontage and the Council should review all existing PSAs to ensure they comply with this requirement. For the purposes of clarity, the Council should also ensure that in illustrating the PSAs on the proposals map the extent of each building included within the designated area rather than just frontages.

7.4 Primary frontages are likely to include a high proportion of retail uses whilst secondary frontages provide greater opportunity for a diversity of uses. The Council's approach to retail frontages is set out in the General Development Control Policies document under Policies DC34 and DC35. At present the Council adopts a blanket approach to frontages across all centres despite the clearly disparate role and function of the town and village centres. We consider it would be more suitable for the Council to separate out the policy for Horsham town centre from the village centres in order to guide and facilitate appropriate development which accords with the role and function of the centres. The recommended approach for Horsham is set out in more detail in the following section.

Quantitative Capacity Forecasts

7.5 Based on the performance of existing provision and taking into account projected population and expenditure growth, we have identified global capacity to support c.9,234 sqm net additional convenience goods floorspace by 2015; increasing to 10,231 sqm net by 2020, 11,401 sqm net by 2025 and 11,604 sqm net by 2026. This is a significant level of capacity, reflecting the strong performance of existing provision and high levels of trade retention.

7.6 In the case of comparison goods, we project global capacity to support 3,236 sqm net additional floorspace by 2015; increasing to 13,565 sqm net by 2020, 26,186 sqm net by 2025 and 28,927 sqm net by 2026. The majority of this capacity is being generated by the strong performance of Horsham town centre.

7.7 In terms of comparison goods, we project global capacity to support 3,236 sqm net additional floorspace by 2015; increasing to 13,565 sqm net by 2020, 26,186 sqm net by 2025 and 28,927 sqm net by 2026. The majority of this capacity is being generated by the strong performance of Horsham town centre.

7.8 There is evident capacity in quantitative terms to support additional retail floorspace in the town centre; however our qualitative assessment has identified limited physical opportunity for expansion. Notwithstanding this, PPS4 policy EC5.1 requires LPAs to identify an appropriate range of sites to accommodate the identified need. An apparent lack of sites of the right size and in the right place should not be a reason for LPAs to avoid planning to meet the identified need for development. PPS4 encourages LPAs to proactively plan to promote their town centres and advocates the town centre's first approach. Within this section we present a selection of options for the Council to consider towards planning to meet identified need.

Horsham Town Centre

i) Sub-regional Positioning

7.9 In terms of the sub-regional context, the household survey has identified Crawley, Guildford, Brighton and Worthing as Horsham's main competing centres. Our review of the key performance indicators confirm the higher order shopping roles of each of these centres, particularly Brighton and Guildford, which are the highest ranked centres (9th and 24th respectively) and achieve substantially higher rents and retailer requirements than Crawley, Worthing and Horsham. The overall influence of these centres over the District is however relatively diluted, reflecting their appeal as more occasional 'day out' shopping and leisure trip destinations for those living in Horsham's core catchment.

7.10 It is evident that Worthing performs marginally better than Horsham in each of the key indicators, consistent with its position in the regional hierarchy as a primary regional centre. Reflecting its location to the south of the District, Worthing exerts most influence on the southern-most zones in the survey area. Its highest market share is in Zone 14 (48%) which is predominantly located outside the District boundary. It does however have a 32% market share in Zone 12 and 18% market share in Zone 11 (both within the District) which exceeds Horsham town centre's market share in these zones.

7.11 The close proximity of Crawley and its higher order retail offer is reflected by its 22% market share in the survey area which is almost equivalent to Horsham's 24%. Again this reflects Crawley's elevated status in the regional hierarchy compared to Horsham. However on closer analysis it is evident that Crawley draws the majority of its comparison retail expenditure from Zones 4 and 9 which are predominantly located outside the District boundary. Its actual influence over zones within the District is more limited reflecting the strength of Horsham and its influence in the District.

7.12 Horsham town centre is clearly the dominant centre in the survey area with a clear and well-contained core catchment area covering Zones 3, 6, 7, 8 and 10 in which it has a greater than 50% market share. The centre also has a reasonably strong influence over Zones 2, 5, 12 and 13 in the south and west of the survey area where it has a greater than 20% market share. As highlighted above, Horsham is less influential in the south of the District where it competes for market share with Worthing, and to a lesser extent Brighton; and in the north-east of the survey area where it competes with Crawley.

7.13 We have identified some new development in the pipeline in each of the main competing centres which may have potential to increase their overall influence across the survey area and Horsham District, although several major schemes are currently on hold. Notwithstanding this, it will still be important for Horsham to build on its strengths to ensure it maintains and where possible, enhances its market share, to offset planned growth elsewhere in the sub-region. The suspension of competing schemes presents an opportunity for Horsham, and the Council should be proactive now in formulating a strategy and seeking opportunities for new development/redevelopment of existing stock.

7.14 The Council should monitor Horsham's market share over the plan period which will provide a clear indication of its on-going performance and detect any apparent growth or decline.

ii) Current Performance

7.15 Horsham appears to be a healthy town centre and is performing well in respect of the PPS4 health check indicators. The town centre's role and function is consistent with its position in the regional hierarchy as a Secondary Regional Centre at a level below Primary Regional Centres such as Crawley, Worthing, Guildford and Brighton. Despite its secondary regional status, the centre is performing well against competing centres which have a greater comparison shopping function. This is largely as a result of its unique characteristics, strong mix of retail and other town centre uses and niche offer which clearly differentiates it from other typical 'clone' towns.

7.16 At the current time the centre has a good representation of multiple comparison goods retailers as well as some more niche, independent operators and offers a good range of key services, food and drink outlets and reasonable leisure provision. The centre has below average number of vacant units and there is also recent evidence of new operators moving into the centre including restaurant multiples Carluccio's and Ask. Prime yields have also remained consistently strong which is a further indication of on-going investor confidence in the centre. Whilst in other areas the centre has experienced a marginal downturn e.g. in terms of Prime A rents and retailer requirements; this is consistent with national trends and the recent recession and not specifically isolated to Horsham.

7.17 The centre has a particular strength in terms of its comparison shopping offer which includes several higher-order retailers alongside some more boutique and specialist retailers, creating a diverse retail offer unlike other typical 'clone' towns. Horsham also benefits from a wealth of historical architecture which has been well-preserved and adds to the overall high quality environment. Simultaneously however, the historic townscape creates some hindrance in terms of legibility and ease of movement between clearly different areas of activity across the centre. There are various walkways and cut-throughs which add to the character of the centre. However the quality and appeal of these walkways varies and there is scope, particularly for those that do not know the centre well, to improve linkages and encourage people to explore different areas of the centre.

7.18 The main focus of retail activity is along West Street which facilitates links to the Swan Walk shopping centre to the north and the Forum to the south. Other key areas of activity include Carfax which is predominantly service-orientated; Piries Place which accommodates, smaller more specialist retailers, food and drink outlets and the Waitrose supermarket; and East Street where there is a budding concentration of restaurants and eateries.

7.19 There is further scope to enhance these areas as distinct, complementary quarters of activity and to facilitate movement between them through clear and well-placed signage and effective marketing. The Council should continue to be proactive in maintaining and improving the quality of the environment through effective town centre management. There is also scope to enhance Springfield Court within the Swan Walk shopping centre which has evidently declined since the previous assessments in 2003 and 2005. The shopping centre is a key element of the primary shopping area and the Council should continue to encourage the enhancement of the shopping centre. There is potential for units, particularly those in Springfield Court, to be merged together to create larger floorplates as these generally tend to be more appealing to a wider range of key multiple retailers. This part of the shopping centre appears to have the lowest levels of footfall so by proactively encouraging new retailers to locate here will help increase overall footfall throughout the shopping centre and town centre as a whole.

iii) Town Centre Boundary & Frontages

7.20 The adopted LDF (2007) defines Primary Shopping Area (PSA) and Primary and Secondary Shopping Frontages in Horsham town centre. In accordance with PPS4, policies contained within the General Development Control Policies Document, clearly sets out which uses will be permitted in such locations and the criteria to be fulfilled by development proposals. It is considered appropriate to maintain this protection of uses within the primary and secondary shopping frontages.

7.21 The defined shopping frontages, PSA and town centre boundaries in Horsham town centre are identified on the Proposals Map. In accordance with PPS4, the PSA should generally comprise the defined shopping frontages. Before we consider the extent of Horsham's PSA in more detail, it is first necessary to establish the appropriateness of the defined shopping frontages.

7.22 Our qualitative health check has enabled a detailed understanding of the retail composition and levels of pedestrian activity throughout different areas of the town centre and as such gives a clear indication as to the appropriateness of the shopping frontage designations going forwards. It should be noted that what appears to be a declining retail frontage (e.g. Springfield Court) should not necessarily be relegated to a more secondary role, and should instead be given the opportunity to develop and improve over the plan period through policy intervention: thereby retaining and enhancing its role.

7.23 On this basis we recommend that the existing primary shopping frontages identified on the proposal map are maintained with the exception of 1-5 East Street and the listed public house on the corner of East Street and Carfax to allow the development of a distinct restaurant quarter in this area. It will be necessary to develop a clear policy approach to this area to encourage the continuing development of a quality restaurant offer alongside other complementary uses and adopt a resistance to A5 fast food take away uses which could otherwise undermine the enhancement of the area.

7.24 In terms of the defined secondary frontages, we recommend that the existing secondary shopping frontages identified on the proposals map, which already include a considerably more mixed composition of retail and other town centre uses, are maintained with the following exceptions:

- Units along Bishopric to the east of Albion Way;
- Units along Springfield Road to the north of Albion Way;
- Units along London Road;
- 50-69 and 46-68 East Street; and
- Units along Queen Street to the east of East Street.

7.25 The above comprise clusters of shops which are located on the periphery of the town centre, in most cases physically and/or visibly separated from the main shopping area, and are not intrinsically linked with the PSA. These clusters include a broad mix of town centre uses including retail, leisure service and office uses interspersed with non-town centre uses such as dwellings. On this basis and taking into account the peripheral location, these areas are likely to be performing a more localised function, generally orientated towards meeting local top-up/everyday needs of the local catchment population.

7.26 For this reason, we consider it more appropriate for these areas to be protected under an alternative designation as Town Centre Parades. The policy approach to these areas should encourage and maintain a reasonable proportion of A1 local shopping provision to meet the needs of the local catchment. The development of fast-food take-aways in these areas may be considered appropriate in cases where they will not lead to an overconcentration of such uses which can have undesirable effects.

7.27 PPS4 states that the PSA generally comprises the primary and those secondary frontages which are contiguous and closely related to the PSA. The defined PSA does not currently conform to the above and we therefore recommend that the PSA is clarified and extended to illustrate an 'outer boundary'. The PSA should include the following:

- Units within Swan Walk shopping centre between Swan Walk, Springfield Court and the multi-storey car park to the rear of Bhs and Marks & Spencer;
- Units at 2-4 Medwin Walk and 13-24A Carfax;
- The area between Copnall Way, Parkway and East Street (excluding the multi-storey car park and dwellings);
- Units along East Street southside (No. 2-44);
- Units at Market Square, Glynde Place and South Street;
- Units along West Street southside (No. 2-34);
- The Forum; and
- 1-13 Bishopric and 2-30 Worthing Road.

7.28 In respect of capacity for additional comparison goods floorspace we have identified global capacity to support 3,236 sqm net by 2015, growing to 13,565 sqm net by 2020, and again to 26,186 sqm net by 2025 and 28,927 sqm net by 2026. We discuss potential development opportunities further below, but within the PSA these area generally smaller scale infill sites or recycling exist stock. Our assessment has demonstrated that Horsham, as a secondary regional centre, is not expected to make a step change within the regional network of centres.

7.29 The Council's objective should be to consolidate and enhance the existing composition of the town centre. Our assessment has demonstrated that Horsham has the potential to consolidate and enhance its market share through investment in the existing building stock, the adjoining environment and small-scale infill development. PPS4 states that LPAs should identify sites in the centre, or failing that on the edge of centre, capable of accommodating larger format developments where a need for such development has been identified. Given the identified capacity and physical constraints and limited opportunities for expanding the centre's retail core, the Council should give consideration to edge-of-centre sites and adopt the sequential approach to site selection.

7.30 In terms of convenience goods provision, Horsham is well served by major foodstore retailers offering a large Sainsbury's and Waitrose supermarkets; an M&S Simply Food in addition to various smaller, independent convenience retailers e.g. Horsham Cheese Shop, Chris White Butchers and Forfars Bakery. The Sainsbury's and Waitrose are both performing well and our analysis suggests both are overtrading. The M&S Simply Food appears to be trading less well, although this must be caveated as it is common for the household survey to underestimate the turnover of these stores as they do not pick up passers by, linked trip shoppers, local employees and 'quick stop' shopping trips. Our qualitative assessment and observations from our site visit to the centre suggest the store is trading well.

7.31 Taking into consideration the actual trading performance of all foodstores, either under or over performing, our assessment identifies capacity to support 3,685 sqm net additional convenience goods floorspace in Horsham town centre by 2015. This is forecast to grow to 4,172 sqm net by 2020, and again to 4,728 sqm net by 2025 and 4,822 sqm net by 2026. In accordance with PPS4 this should be directed towards the PSA in the first instance, before considering edge-of-centre sites that will be or are well connected to the centre. In the event that there are no suitable, viable or available edge-of-centre sites; out-of-centre sites may be considered with preference given to those which are or will be well served by a choice of means of transport and are closest to the centre and have a higher likelihood of forming links with the centre.

iv) Development Opportunities

7.32 Our quantitative assessment identifies capacity to support additional retail floorspace in Horsham over the plan period. However, there appear to be few opportunities to expand or redevelop existing retail sites in Horsham town centre given the physical composition of existing retail areas and historic nature of many buildings and the physical constraints of the surrounding road network (Albion Way). PPS4 states that LPAs should identify an appropriate range of sites to accommodate identified need through a sequential approach to site selection, giving preference to locations in existing centres in the first instance before considering edge-of-centre sites and then out-of-centre sites. On this basis, identified capacity should be directed in and on the edge of Horsham town centre and we have identified two areas which may warrant further consideration as potential opportunity areas.

7.33 It should be noted that the following are suggestions based on our analysis of the centre and the Council would need to ascertain from the further work whether they are appropriate and/or viable/deliverable.

- **Swan Walk Shopping Centre** occupies a prime position within the primary shopping frontage with linkages to East Street and Carfax. Our assessment demonstrates that part of the shopping centre is not currently performing as well as it should be with an increasing number of vacant units and low levels of pedestrian footfall in parts. The shopping centre was originally constructed in the 1970s and represents a more modern architectural component which is not constrained, in planning terms, like other historic parts of the centre. We therefore consider there is an opportunity to improve the use of the land either through the comprehensive redevelopment of the shopping centre and brownfield land to the rear (including the car park) or through internal alterations/reconfiguration of units seeking to create new retail accommodation that would better suit modern retailer requirements. Either approach would help inject life back into the centre, although the former would provide greater opportunity to significantly improve the current use of the land in such a prominent location.
- **Land to the east of Worthing Road, south of Bishopric and including the Lifestyle Ford, site (Policy AL 2) and Albion Way**. Part of this area includes a site currently allocated as a development site for residential and commercial uses and open space. The remainder of the area comprises a selection of sites within a variety of uses and numerous land ownerships. It also includes Albion Road and approximately seven listed buildings. Subject to our recommendations for

a revised PSA, this area could be defined in policy terms as edge-of-centre. Subject to improving connections and integration with the centre and overcoming obvious constraints, this area could be considered an appropriate location to accommodate development to meet identified need. Notwithstanding evident challenges and hurdles that would need to be overcome in order to achieve adequate integration and linkages with the existing shopping area, in policy terms this site could be identified as a suitable site that could be considered as part of a town centre planning brief SPD.

v) Eating / Drinking / Entertainment

7.34 Our assessment has demonstrated that whilst the overall proportion of leisure uses in Horsham town centre is below average, there is a good range of different leisure activities on offer in the centre. These leisure uses are broadly distributed across the centre although there is a clear focus on East Street and around Market Place, where there are several restaurants and one or two drinking establishments. It is evident from the household survey that the local catchment largely choose Horsham for visiting restaurants and pubs. It is evident that the influence of the centre's restaurant offer extends beyond the immediate catchment and, in parts, beyond the District boundary attracting 16% of visitors from Zone 2 and 11% from Zone 5.

7.35 Horsham is clearly performing well as a restaurant destination at the current time and the Council should seek to maintain and enhance the role of East Street and the surrounds as a distinct restaurant 'quarter'. Nurturing such uses is considered key in encouraging a differentiated offer and quality provision compared to competing destinations such as Crawley. The Council should adopt a clear policy approach to protect and encourage the continuing development of a quality restaurant offer alongside other appropriate, complementary evening uses and adopt a general resistance to A5 fast food take away uses which could otherwise undermine the enhancement of the area. This area should be the focus for the centre's evening economy and should appeal to a wide range of age and social groups.

7.36 Evidently evening entertainment can bring with it anti-social behaviour and the Council should incorporates policy to mange this. We make the following recommendations:

- We recommend that A5 uses be prevented within the primary shopping frontage and on East Street (Units 1-38 inclusive) and Market Square;
- On East Street and Market Square, 'restaurants and cafes' (A3) and 'drinking establishments' (A4) should be allowed to ensure the continued vibrancy of this activity. The Council may wish to control the proportion / number of A4 (drinking establishment) uses which, in concentration, might give rise to anti-social behaviour.

7.37 Horsham is clearly competing with other centres, notably Crawley, in terms of other leisure uses. The Capitol cinema to the north of Horsham town centre, near Horsham station, attracts 14.3% of people from the survey area compared to 54% that choose the 14-screen Cineworld in Crawley. Similarly, the

Hollywood Bowl at Crawley Leisure Park attracts 62% of residents in the survey area compared to 24% that visit The Big Apple in Horsham. We have identified no bingo provision in Horsham and again Crawley is evidently the most attractive destination for this type of social entertainment.

7.38 Crawley is the most popular destination for cinema and bowling, both of which are located at the Crawley Leisure Park. The leisure complex also comprises a selection of restaurants, bars/club, a health club and expansive, free parking which will add to its appeal. It is evident that residents within the survey area are prepared to travel a further distance to use these facilities, despite closer provision in Horsham. Unless there is a substantial improvement in Horsham's facilities, it is unlikely that these patterns of leisure use will change over the plan period. There is evidently scope to enhance the quality of existing commercial leisure uses in Horsham, although this would need to be able to compete with rival destinations and claw-back trade currently leaking elsewhere.

vi) Town Centre Management

7.39 Our findings have identified the need to consolidate Horsham's position and retail offer. The key focus will be the ongoing encouragement of new, high quality operators, maintaining a high quality environment throughout the centre, improving legibility and connectivity and, where opportunities arise, quality in-fill redevelopment. This can be partly achieved through policy, but would also benefit from focused management to facilitate business partnerships working between key stakeholders, commercial contacts with key operators (both existing and potential), the monitoring of key performance indicators, and the promotion of marketing and publicity campaigns.

7.40 Horsham Unlimited, the Town Centre Business Partnership, is already in place and focused on achieving many of the above. We recommend this partnership is maintained and supported to facilitate the future direction of the centre and enhanced vitality and viability.

Retail Warehousing

7.41 Retail warehousing in Horsham is reasonably limited although there are some vacant units suggesting no overwhelming demand for this type of floorspace. Existing retail warehouse tenants include a range of traditional warehouse operators e.g. Homebase, Halfords, Currys and Staples, which do not compete directly with retailers in the town centre and instead offer a complementary retail offer. Consequently, existing retail warehousing provision in the District is trading very strongly.

7.42 Given the level of capacity identified and constraints in Horsham town centre, the Council may be put under pressure to allow additional development in out-of-centre locations e.g. at Broadbridge Heath. We strongly advice that the Council does not allocate any out-of-centre sites for retail development. However, the Council could consider developing a criteria-based policy to allow some flexibility for the sale of certain types of bulky goods (e.g. furniture & furnishings, carpets & other floor coverings, household textiles, household appliances, tools & equipment for house and garden[18]) that may be considered appropriate in out-of-centre locations, to come forward. Evidently all applications must comply with the key policy tests set out in PPS4.

7.43 Any proposals for new development in an out-of-centre location would need to fulfil the requirements of PPS4 and should be carefully conditioned to restrict specific retail uses, the creation of mezzanine floors and sub-division of units in order to maintain sufficient control over new floorspace and protect the vitality and viability of Horsham town centre.

Billingshurst Village Centre

i) Current Performance

7.44 Billingshurst is currently functioning reasonably well as a village centre meeting the local shopping and service needs of the resident catchment population. It is evident that the centre has experienced some decline in retail provision over recent years and there has been a significant increase in vacant units since 2007.

7.45 It is however evident from the household survey that the centre is performing a key local role and the majority of visitors cite 'close to home' as the main reason for choosing the centre. Billingshurst clearly has a role in terms of top-up food shopping within its core catchment area (Zone 6) drawing 60% of residents for this purpose. The Budgens on High Street is the main convenience store and, according to the survey, is more popular amongst local residents than the Tesco Express located adjacent to Billingshurst station. This is reflected in the performance of the store which is currently trading well and above company average levels. We estimate that the Budgens has a convenience goods sales density of £8,936 per sqm which is much higher than our estimate based on company average, £3,942 per sqm, reflecting the store's strong performance. There is also a selection of smaller convenience goods outlets in the centre which supplement the Budgen's offer.

7.46 The centre has a more limited role in terms of main food shopping and it is evident from the results of the household survey that residents in Zone 6 generally travel to Tesco, Broadbridge Heath (29%) or Sainsbury's, Pulborough (22%) for this purpose. These stores are both within approximately 10-12 minute drive-time of Billingshurst. In addition, 12% use the Tesco Express in Storrington which is equal to those that use the Budgen's in Billingshurst for main food shopping. It is possible that the proportion of residents travelling to Storrington for main food shopping will have increased following the opening of a new Waitrose in the centre in replacement of the Somerfield store.

7.47 Overall, it is evident that there is substantial leakage of convenience goods expenditure from Billingshurst's core catchment which suggests that localised needs of the surrounding residential area are

[18] Derived from the Classification of Individual Consumption by Purpose (COICOP-HBS).

not being met. We therefore consider there may be scope to enhance existing convenience goods provision in Billingshurst. The provision of a large store in the centre would have potential to capture those currently travelling further afield for their main-food shopping, claw back trade and counteract less sustainable shopping and travel patterns. Our recommendations in relation to this are discussed in more detail later.

7.48 As we would expect from a centre of this scale and nature, Billingshurst's comparison shopping function is more limited. The survey highlights some trade draw under the DIY/decorating goods, domestic appliances and electronic equipment which can only really be assigned to the hardware store on High Street (Austen & Co) which is clearly a key anchor. We estimate that the centre has a sales density of £3,135 per sqm, which reflects the rather limited comparison retail offer and is consistent with the scale and role of the centre.

7.49 The centre has a particular strength in terms of its service provision which includes several banks, a post office, dry cleaners and hair and beauty salons. There is also reasonable provision of restaurants, public houses and fast-food take aways. The number / proportion of the latter should be carefully monitored to avoid an over-concentration of such uses which can undermine the vitality of a centre's shopping function and overall environment.

7.50 Billingshurst is characteristic of a village centre and has maintained many of its historic qualities along High Street, creating a pleasant shopping environment. The post-modern architectural style of the Jengers Mead precinct contrasts with the centre's historic components and is less pleasing to the eye. However despite its appearance it is functional, well served by parking provision and there are fewer vacant units here than elsewhere in the centre.

7.51 Existing policy defines the primary shopping area and primary shopping frontage in Billingshurst. We do not recommend any changes to the primary shopping frontage however we do consider that the Council should adopt a more flexible approach to uses permitted within the defined frontage to help alleviate the level of vacancies and facilitate the enhancement of the vitality and viability of the centre. However, we do also recommend that the Council continue to restrict A5 fast-food take aways in the primary frontage.

7.52 In accordance with our earlier recommendation, the Council should review the defined PSA in Billingshurst to ensure it includes the entire primary shopping frontage to comply with PPS4. For the purposes of clarity we also recommend that, when illustrating the PSA on the proposals map, the designation should cover the outer boundary of all buildings implicated rather than just frontages. This will prevent any grey areas in terms of defining sequential locations.

7.53 Our assessment demonstrates that, despite evident decline, Billingshurst continues to offer a good, basic range of local shopping and service facilities which is contributing towards fulfilling the needs of the immediate resident population. Based on the performance of existing provision, we have identified marginal capacity to support additional convenience goods floorspace in Billingshurst in the region of 157 sqm net by 2015; forecast to grow to 220 sqm net by 2026 (based on a large store format). This level of capacity reflects the centre's low market share and high leakage of spend from the area. On the basis that there is substantial leakage of convenience goods expenditure to other foodstore destinations, there is a qualitative argument to support additional convenience goods floorspace in the centre that could counteract leakage and less sustainable shopping patterns.

7.54 There appear to be few opportunities to expand or redevelop existing retail sites in Billingshurst given the historic nature of many of the buildings and development constraints within a conservation area. However, PPS4 states that LPAs should use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres. In the case of Billingshurst we consider there is opportunity to enhance the centre utilising land to the east of High Street and at Jengers Mead.

7.55 Jengers Mead occupies a prime position within the PSA and primary shopping frontage. The area comprises the post-modern style shopping precinct with retail units at ground floor level and residential/office uses above and the car parking area in the forefront. Whilst the precinct is currently functioning reasonably well and there few vacant units, the development is considered dated and contrasts with the more traditional rural characteristics displayed across the rest of the centre. In retail policy terms this site is sequentially preferable for retail development and offers scope to provide more modern, suitable retail units in a design that will preserve and enhance the conversation area and the overall vitality and viability of the centre. There is an opportunity to enhance convenience goods provision in the centre and this site could be considered suitable to accommodate a new foodstore development. Clearly this is only one option, but would help address the leakage of trade.

7.56 In addition to the above there is also scope to better utilise land currently occupied by Jengers Mead car park which appeared to be under-used at the time of our site visit. Whilst parking provision in the centre is important, the Council should assess the utilisation of existing provision to determine whether there is scope to release any car parking land for development.

7.57 It is evident that there are some physical opportunities to enhance Billingshurst and, in accordance with PPS4, the Council should proactively plan to promote the centre and make full use of planning tools to facilitate development. The Council might wish to consider preparing a town centre planning brief SPD for Billingshurst, given its vulnerabilities, to establish a clear set of proposals and policies that will help develop and enhance the centre, sensitive to its conservation area setting.

ii) Growth Scenario

7.58 The Council have confirmed that the land to the east of Billingshurst is on the 'short list' of strategic site options and will be the subject of further work to assess its appropriateness and feasibility to accommodate new development. Initial proposals for the area include major new housing provision, in the region of 1,750 dwellings which, based on an average of 2.3 persons per household would result in approximately 4,025 additional people living in the Billingshurst area.

7.59 Alongside a growth in population there will be a simultaneous growth in available expenditure in the locality which will in turn generate further capacity for additional retail provision in the area. We would expect some additional pressure to be exerted on existing facilities in Billingshurst and this would need to be carefully monitored to ensure that existing provision remains sufficient to meet the needs of the local catchment area.

7.60 Our assessment highlights that 4,025 additional residents living in the area would, theoretically, have potential to generate approximately £8m of convenience expenditure in 2015. Taking into account forecast growth in expenditure, we project that this will increase to approximately £8.4m by 2026. On the assumption that 100% of this expenditure is retained in Billingshurst, the new population could support between 804 and 2,010 sqm net of convenience floorspace by 2015 (depending on the store format). In addition to the identified baseline capacity, this suggests possible scope for between 961 sqm net and 2,402 sqm net of convenience goods floorspace in Billingshurst by 2015. The level of capacity would increase further if the centre is able to claw back trade leakage and increase its market share.

7.61 In the event that this level of population growth does come forward in the Billingshurst area within the lifetime of the plan, the Council will need to consider how best to meet identified need for additional convenience goods floorspace. Taking into consideration the existing performance of the centre and potential significant growth, we present a series of options for the Council to consider in planning for the future of Billingshurst and meeting the needs of the whole community.

Option 1: Do nothing

7.62 This option would see the centre continue to function as it is currently, relying on its role as a top-up food shopping destination and local service centre. With no major improvement in facilities, current patterns of expenditure leakage will continue as existing and future residents choose to undertake their main food shopping in larger stores elsewhere in the District. It is possible that the centre will experience further decline without any intervention to enhance or maintain its vitality and viability, although we also acknowledge that, at present, the centre continues to perform an important local role.

Option 2: Promote existing centre and provide consumer choice

7.63 PPS4 encourages LPAs to proactively plan to promote competitive town centres and provide consumer choice by identifying sites, in accordance with the sequential approach, capable of accommodating development where a need for such development has been identified. Our assessment identifies need for additional convenience goods provision in Billingshurst in both quantitative and qualitative terms and there is an opportunity for the Council to consider the suitability of sites to accommodate new provision to meet this need in or on the edge of the existing centre. The provision of a new foodstore has the potential to clawback trade currently leaking from the centre's core catchment; increase overall market share and enhance Billingshurst's attraction as a retail centre. This will help reduce less sustainable patterns of travel and enhance the centre's role as a convenience shopping destination. This should be brought forward through structured and focussed policy framework e.g. town centre planning brief SPD.

Option 3: New centre in planned growth area

7.64 On the basis of existing need and in light of the potential for significant housing development to come forward in the area (and associated growth in available expenditure generated by the new resident population), there is sufficient quantitative capacity to support new retail floorspace in the area. There is the option for new facilities to be provided within a new centre with a foodstore anchor located within the new growth area. The Council should thoroughly assess the impact of a new centre on Billingshurst and other existing centres in the District in accordance with PPS4.

Option 4: Promote Billingshurst and plan for a new centre

7.65 This option is an amalgamation of Options 2 and 3 which would see appropriate investment directed towards Billingshurst seeking to enhance the centre's ability to meet the needs of its core catchment; alongside the provision of new facilities directed towards fulfilling the needs of new residents living in the growth area. The Council should adopt a sequenced approach and pro-actively promote Billingshurst in the first instance before considering and testing the options for development in the new growth area. In accordance with PPS4, the Council should thoroughly assess the impact of a new centre on Billingshurst and other existing centres in the District.

Southwater Village Centre

i) Current Performance

7.66 Southwater is a modern village centre complex which is currently performing well against most of the PPS4 health check indicators. There is a good basic range of shops and services on offer at Lintot Square, no vacant units and the quality of the environment is high. The centre is evidently popular and the only obvious constraints relate to parking and accessibility by public transport. The survey indicates that 77% of visitors travel by car/van and at the time of our site visit there were several cars queuing to park which we understand is a common, everyday occurrence. Whilst this demonstrates the popularity of the centre it may also act as a deterrent and result in potential visitors travelling elsewhere to fulfil their shopping needs.

7.67 It is evident from the household survey that the centre is performing a key local role and the majority of visitors cite 'close to home' as the main reason for choosing the centre. The Co-op is the only convenience goods provision in the centre, aside from the weekly market, and is performing well and above company average. We estimate that the Co-op has a convenience goods sales density of £7,880 per sqm which is higher than our estimate based on company average, £6,953 per sqm, reflecting the store's strong performance. Closer analysis demonstrates that the Co-op is predominantly fulfilling top-up food shopping needs in the centre's core catchment (Zone 7) and is not really performing a main food shopping role.

7.68 The survey indicates that residents living in Zone 7 generally travel to the Tesco, Broadbridge Heath (59%) or the Sainsbury's in Horsham town centre (27%) for their main food shopping. It is apparent that the Tesco and Sainsbury's also draw some top-up food shopping trade from Zone 7, 16% and 5% respectively. The qualitative and quantitative assessment suggests that there is some scope to enhance existing convenience goods provision in Southwater. Our recommendations in relation to this are discussed in more detail later.

7.69 The centre has a good comparison shopping offer which includes a Boots pharmacy, a florist, gift shop, pet shop and other more specialist retailers consistent with its scale and function as a village centre. The centre also benefits from a good range of key local services including a bank, post office, dry cleaners and hairdressers and 24.9% of respondents cited the good range of services as a reason they visit the centre. There is reasonable provision of food and drink establishments for a centre of this scale and function although we would advise that the number / proportion of A5 fast -food take aways is carefully monitored, and restricted through policy, to avoid an over-concentration of such uses which can undermine a centre's vitality.

7.70 Existing policy defines the primary shopping area and primary shopping frontage in Southwater. We do not recommend any changes to the primary shopping frontage. However, the Council should clarify the defined PSA in Southwater on the proposals map so that the designation includes the outer boundary of all buildings rather than just the frontage. This will reduce any grey areas in terms of defining sequential locations; although we do note the physical constraints to expansion.

7.71 Based on the performance of existing provision, we have identified marginal capacity to support additional convenience goods floorspace in Southwater in the region of 88 sqm net by 2015 and 147 sqm net by 2026 based on a large store format. Taking into consideration the amount of convenience goods expenditure currently leaking to other foodstore destinations in the District, there could also be a qualitative argument to support additional convenience goods floorspace in the centre on the basis of clawback. However, the centre is physically constrained and there are no clear opportunities to expand or redevelop existing retail sites in the centre to meet identified need.

ii) Growth Scenario

7.72 The Council have confirmed that the land west of Southwater is on the 'short list' of strategic site options and will be the subject of further work to assess its appropriateness and feasibility to accommodate new housing-led development. Initial proposals for the area include major new housing provision, in the region of 2,750 dwellings which, based on an average of 2.3 persons per household would result in approximately 6,325 additional people living in the Southwater area. Taking into account forecast growth in expenditure, we estimate that the new population would generate approximately £12.4m of convenience expenditure in 2015.

7.73 On the assumption that 100% of the expenditure generated by the new population is retained in Southwater, the new population could support between 1,243 sqm net and 3,107 sqm net of convenience floorspace by 2015 (depending on the store format). In addition to the identified baseline capacity, this suggests possible scope for between 1,331 sqm net and 3,327 sqm net of convenience goods floorspace by 2015.

7.74 There is clearly quantitative capacity to support new convenience floorspace in Southwater. Taking into consideration physical constraints and limited scope for expansion at the existing centre, there is a plausible case for the Council to consider allocating a new local centre, of a similar scale or perhaps larger than Southwater, as part of the wider plan for the strategic growth area. The Council should consider scale and location and thoroughly assess the impact of a new local centre on Southwater and other existing centres in the District.

Growth Area Recommendations

7.75 It is evident from our analysis that there is significant capacity for additional retail development both globally and locally in Horsham, Billingshurst and Southwater. Our review of existing shopping patterns shows that there is a high level of leakage of expenditure from both Billingshurst and Southwater to other shopping destinations within the District and beyond and our qualitative assessment suggests that existing provision is not adequate to fulfil the needs of the centre's local catchments.

7.76 In terms of convenience goods shopping, Billingshurst retains £4.1m (24%) of available expenditure in its location zone, Zone 6, whilst £3.7m (22%) is leaking to Tesco, Broadbridge Heath, £2.8m (17%) is drawn to Sainsbury's, Pulborough and £1.8m (11%) is leaking to the Tesco Express in Storrington. Closer analysis shows that Billingshurst is catering predominantly as a top-up food shopping destination. For the purposes of main food shopping, residents in Zone 6 are choosing to travel further to use the larger food stores (e.g. Tesco and Sainsbury's) which have a wider range of goods on offer.

7.77 Our qualitative health check shows that Billingshurst has experienced some decline since the previous studies and is considered vulnerable. There is potential opportunity to enhance existing provision through the reconfiguration or redevelopment of Jengers Mead although any new development would however need to be sensitive to the character of the conservation area.

7.78 We have identified similar shopping patterns at Southwater which retains just £3.8m (14%) of available convenience goods expenditure in its location zone, Zone 7, whilst £13.2m (48%) is leaking to Tesco, Broadbridge Heath and £5.8m is drawn to the Sainsbury's in Horsham. Like Billingshurst, Southwater is predominantly drawing trade for top-up food shopping. For main food shopping, residents in Zone 7 generally choose to travel further to use the Sainsbury's in Horsham town centre or the Tesco at Broadbridge Heath. Our assessment of the centre demonstrates that Southwater is presently performing very well and the Co-op is overtrading. It is evident from our site visit and discussions with the Council that the centre is near to full capacity although it is physically constrained in terms of opportunities for expansion.

7.79 On the basis of identified shopping patterns and expenditure flows and the performance of existing provision, there is evidently a need arising for new retail provision to improve the ability of these centres to meet localised needs. Plans for major new housing-led development at the strategic growth areas will create additional need on top of this which can only be met through the provision of enhanced/new retail facilities. The Council should therefore consider new retail allocations for the strategic growth areas. In accordance with PPS4, the Council should identify the appropriate scale of development; apply the sequential approach to site selection; and assess the impact of sites on existing centres.

7.80 To re-cap our main conclusions and recommendations, we set out below the key options for the Council to now give consideration to in meeting the needs arising in the Billingshurst and Southwater urban growth areas. These options have not been tested and the Council would need to clearly consider the impact considerations of pursuing any new retail development in new centres or out-of-centre locations.

- Option 1: Do nothing / maintain status quo
- Option 2: Promote existing centres and enhance facilities where possible
- Option 3: Promote new centres to accommodate the needs of the growth areas populations
- Option 4: Promote new and existing centres to accommodate current and future needs

7.81 Given significant capacity there will undoubtedly be pressure for additional out-of-centre convenience goods floorspace. But, as highlighted previously the new Waitrose in Storrington will have absorbed some of this capacity and the Council should also consider the provision of new facilities in Billingshurst and Southwater and their growth areas and potential to facilitate the edge-of-centre site in Horsham if it can be appropriately brought forward underpinned by integration with the centre.

7.82 In 'Planning for Centres', PPS4 states that local authorities must review their hierarchy of centres and any deficiencies in the network of centres should be addressed by promoting centres to either function at a higher level in the hierarchy or designating new centre where necessary. We do not conclude that Southwater or Billingshurst has the physical opportunity to expand to accommodate development sufficient to achieve a step change upwards in the retail hierarchy, although Billingshurst has greater physical opportunities for reconfiguration/redevelopment.

7.83 The Good Practice Guidance clarifies that where local authorities have identified quantitative and/or qualitative needs for retail and other main town centre uses, they should actively examine existing and potential sites within centres, or on the edge of defined centres – and also should consider the scope to expand existing centres and promote new ones. Our assessment concludes a qualitative and quantitative need for additional retail floorspace in both Southwater and Billingshurst, but neither have clear real opportunities for expansion to accommodate such need. We conclude, therefore, that the Council should consider the scope to promote new centres within the urban growth areas.

7.84 The Good Practice Guidance states that having identified the capacity/demand which exists in an area (which this study has concluded), the next critical stage of preparing an effective town centre strategy is to identify the policy options for development – including the scope to accommodate new centres. Crucially, when considering such change and growth to be supported through policy, the local authority must understand the implications for neighbouring centres in terms of their current and potential role.

7.85 In this particular case, the Council should formulate a detailed review of the impact of new centres on the existing centres in terms of trade diversion, carefully considering, through the impact assessment, the appropriate scale of retail floorspace the mix of uses. It will be crucial to understand whether the existing catchment population and future growth areas can support both Billingshurst and Southwater centre as well as new centres in the retail hierarchy. The mix of retail, in terms of a foodstore anchor, ancillary retail, services and other uses, should also be reviewed in order to formulate a robust evidence base to allocate such strategic allocations within the Core Strategy.

Horsham District Council

Retail Needs Study

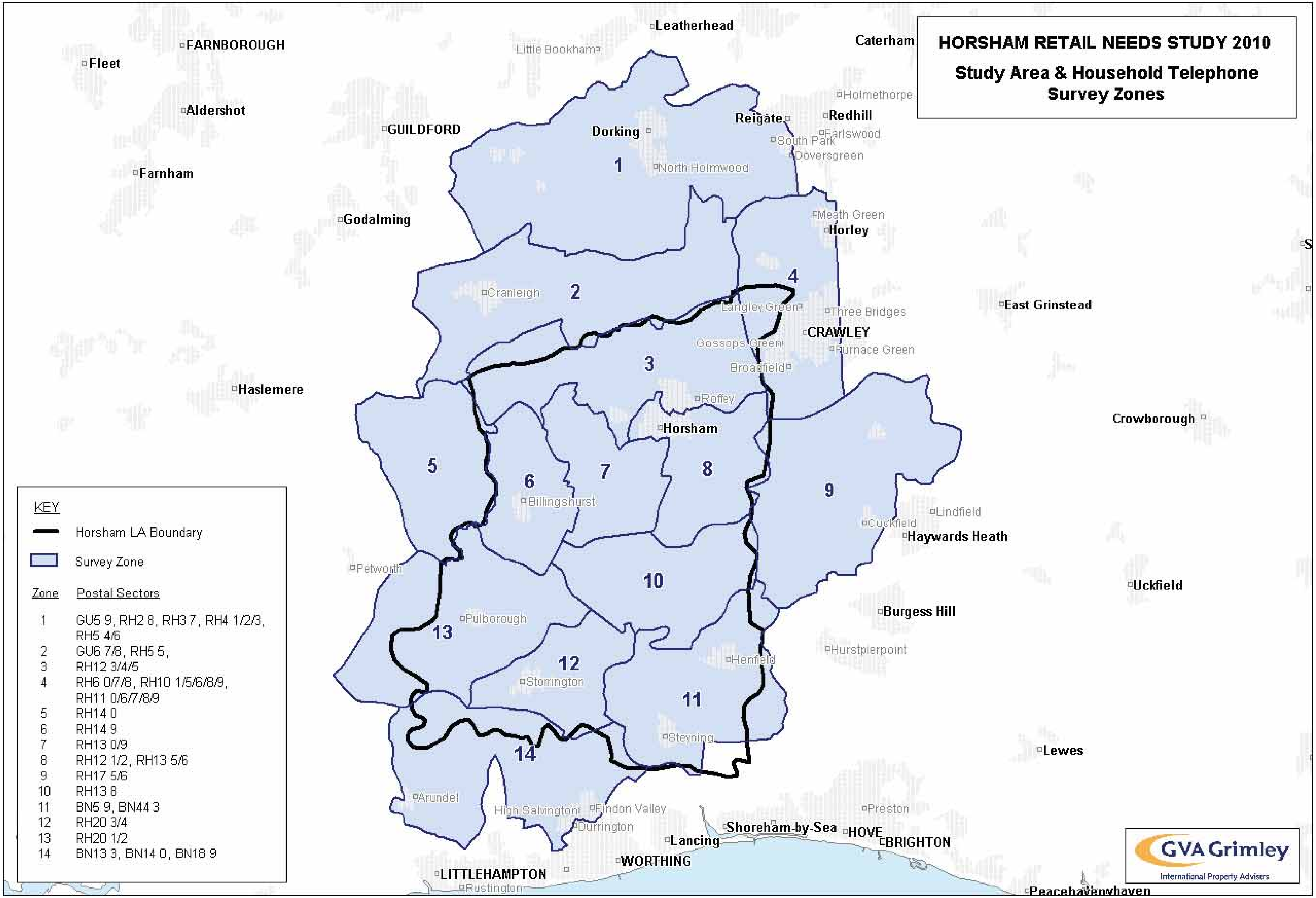
PLANS AND APPENDICES

June 2010

PLANS

PLAN 1

HORSHAM RETAIL STUDY TELEPHONE SURVEY AREA



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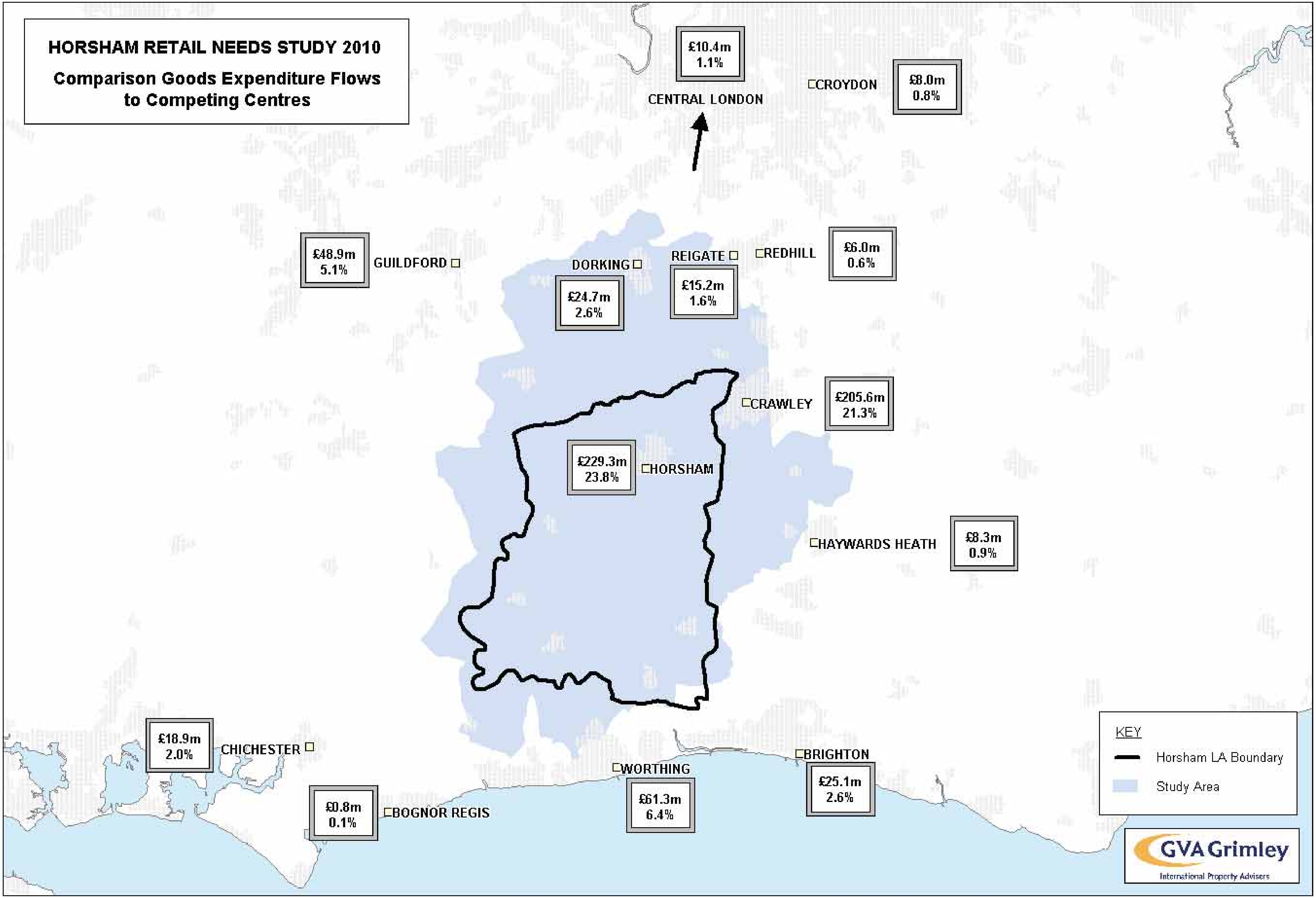
PLAN 2

COMPARISON GOODS EXPENDITURE FLOWS TO COMPETING CENTRES



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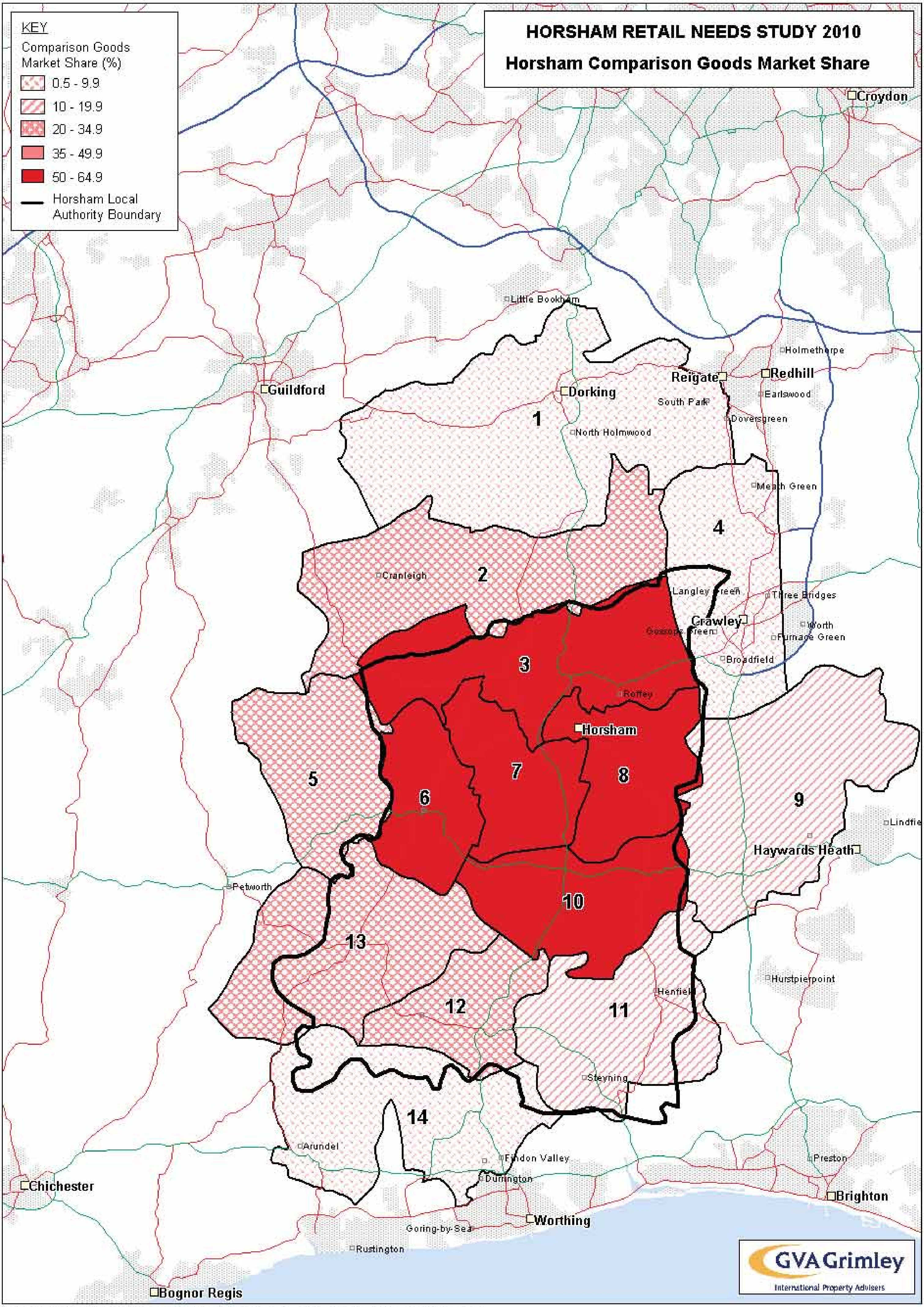
PLAN 3

HORSHAM COMPARISON GOODS MARKET SHARE



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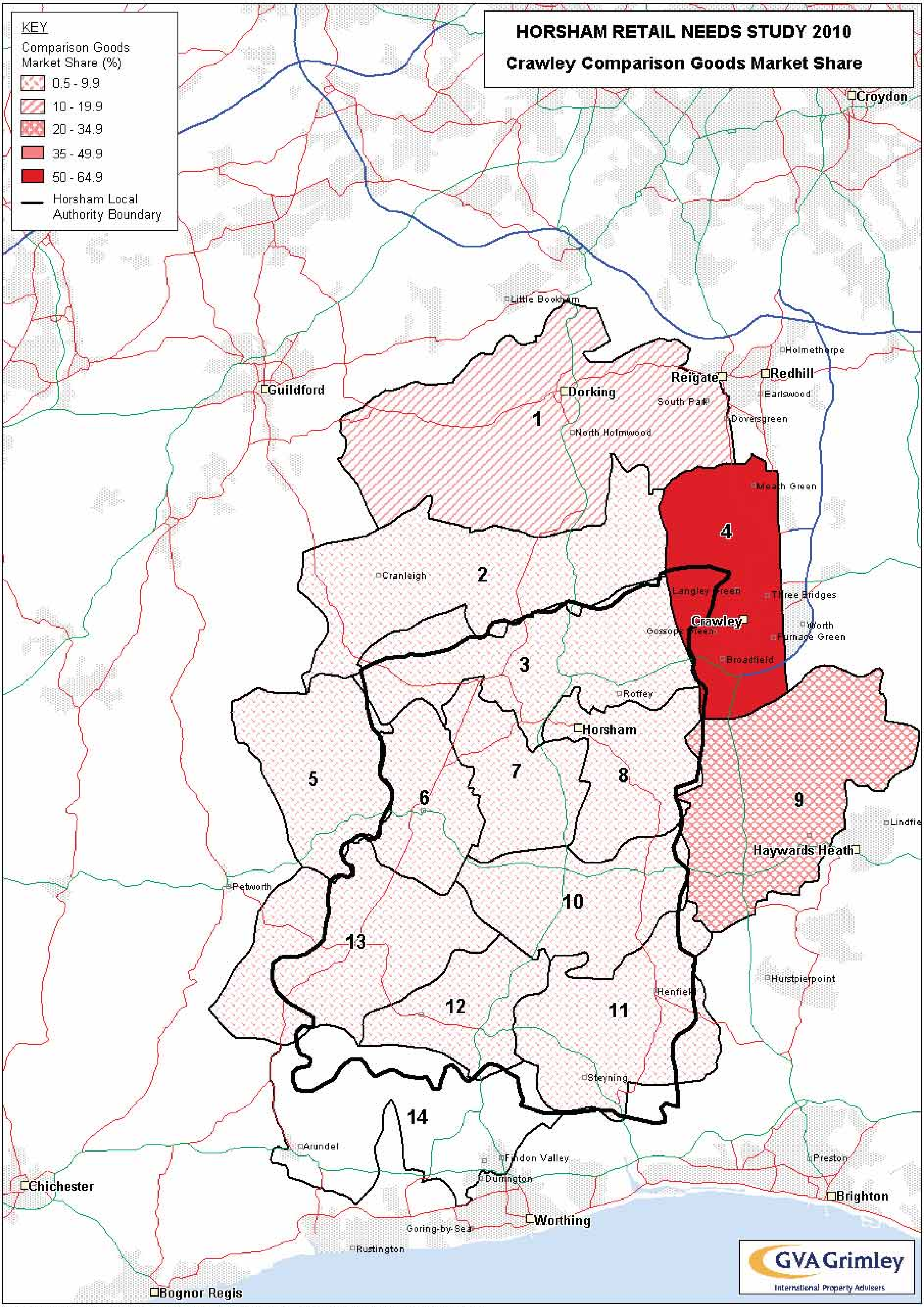
PLAN 4

CRAWLEY COMPARISON GOODS MARKET SHARE

HORSHAM RETAIL NEEDS STUDY 2010

Crawley Comparison Goods Market Share



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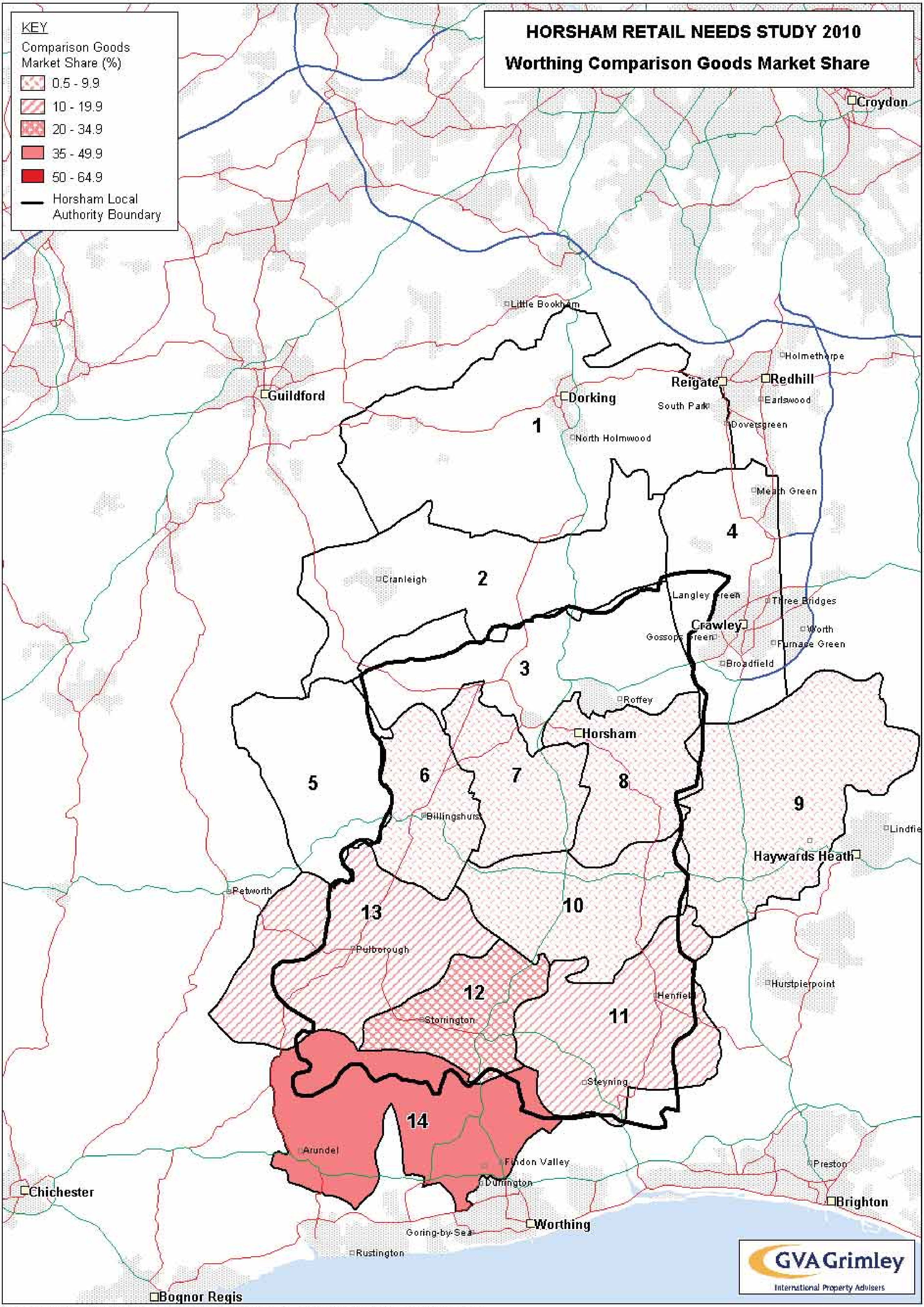
PLAN 5

WORTHING COMPARISON GOODS MARKET SHARE



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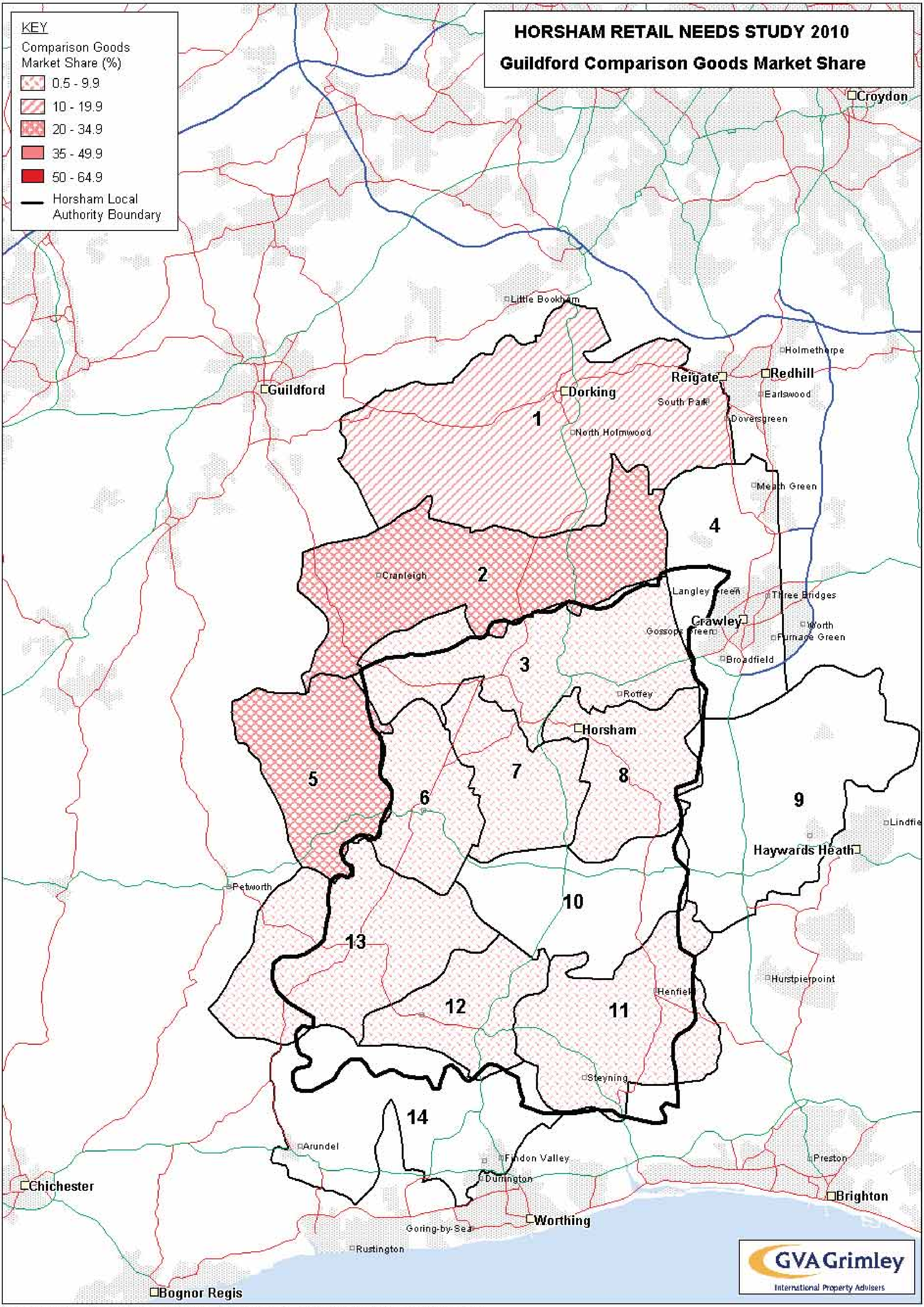
PLAN 6

GUILDFORD COMPARISON GOODS MARKET SHARE



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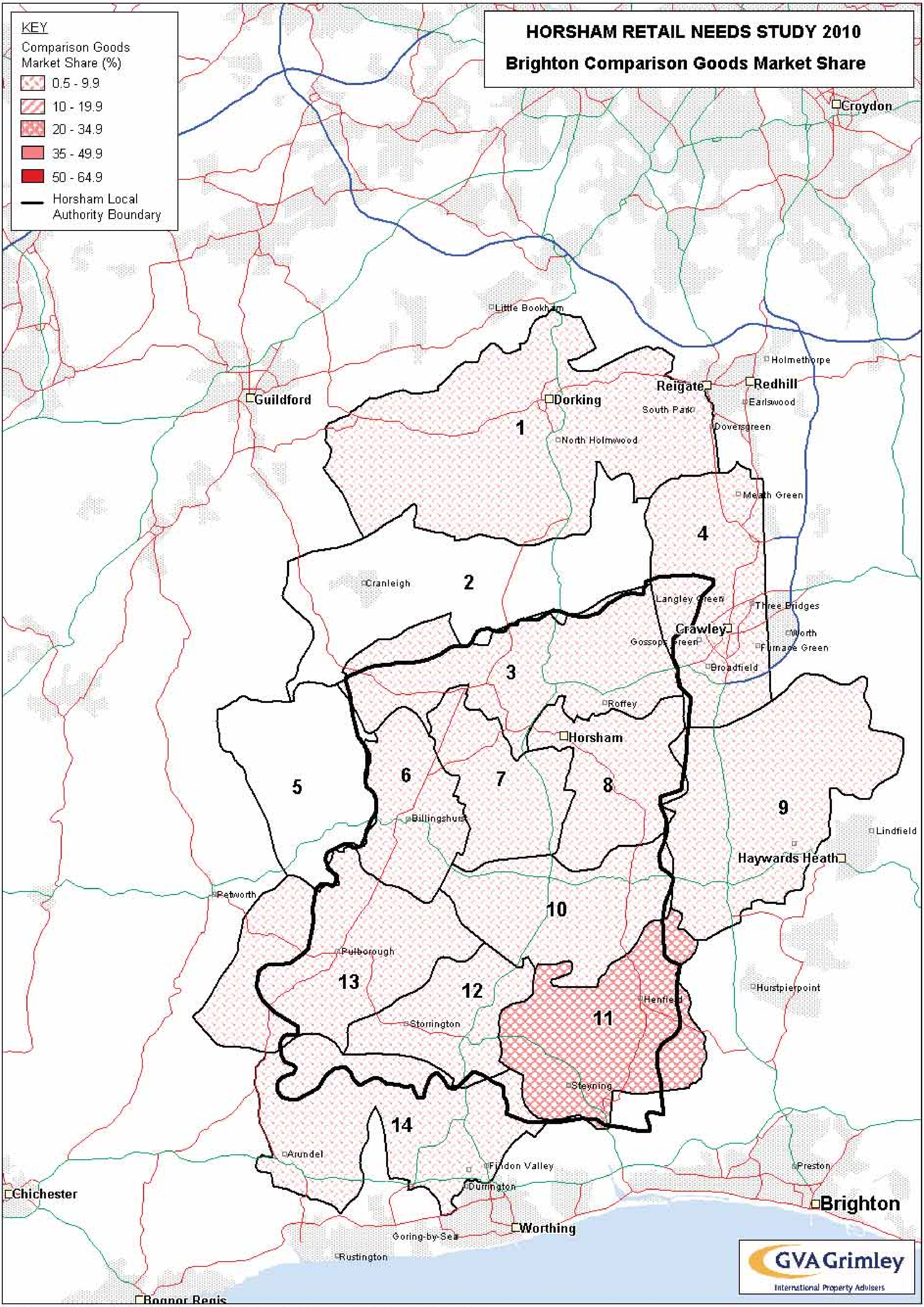
PLAN 7

BRIGHTON COMPARISON GOODS MARKET SHARE



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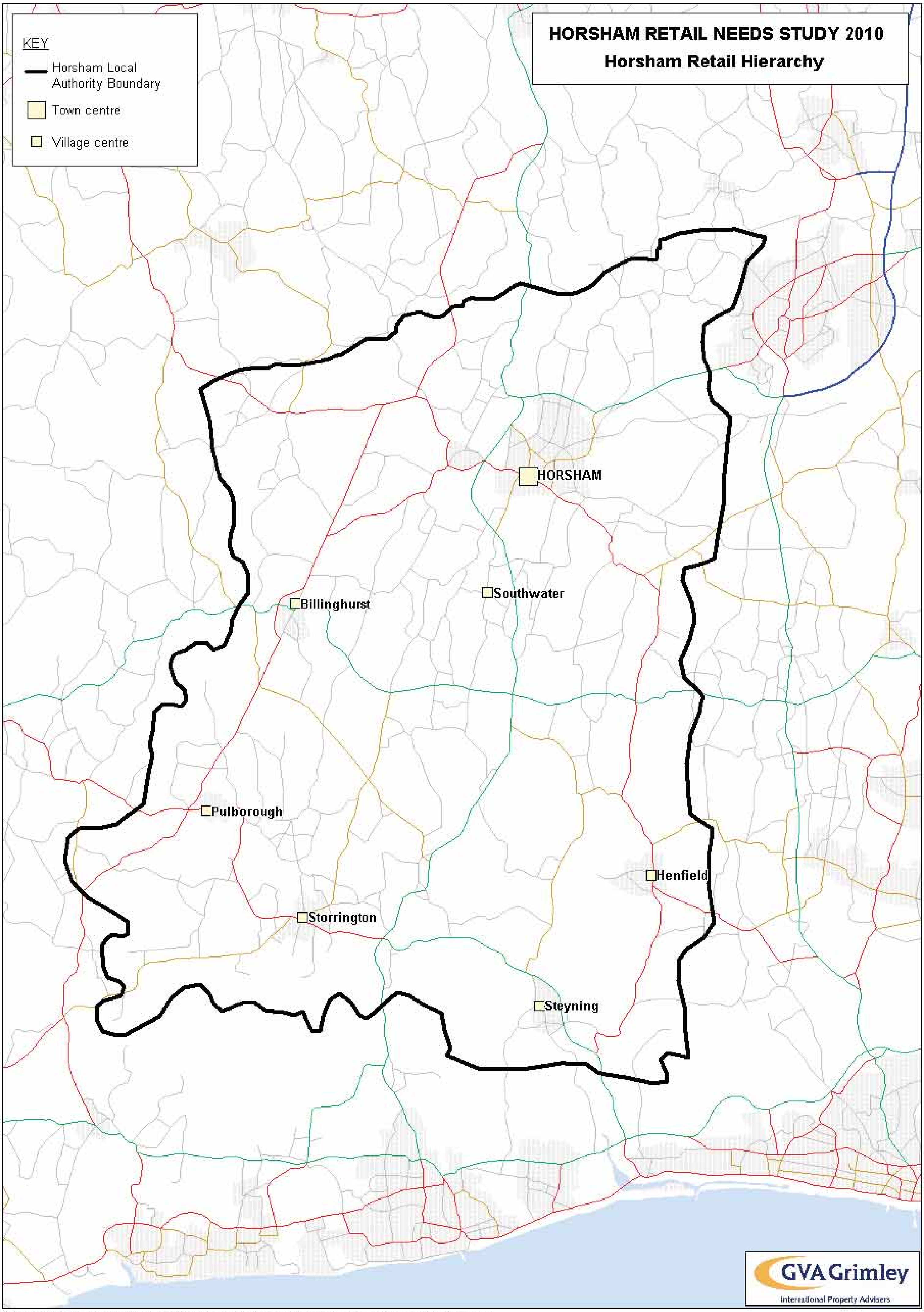
PLAN 8

HORSHAM RETAIL HIERARCHY



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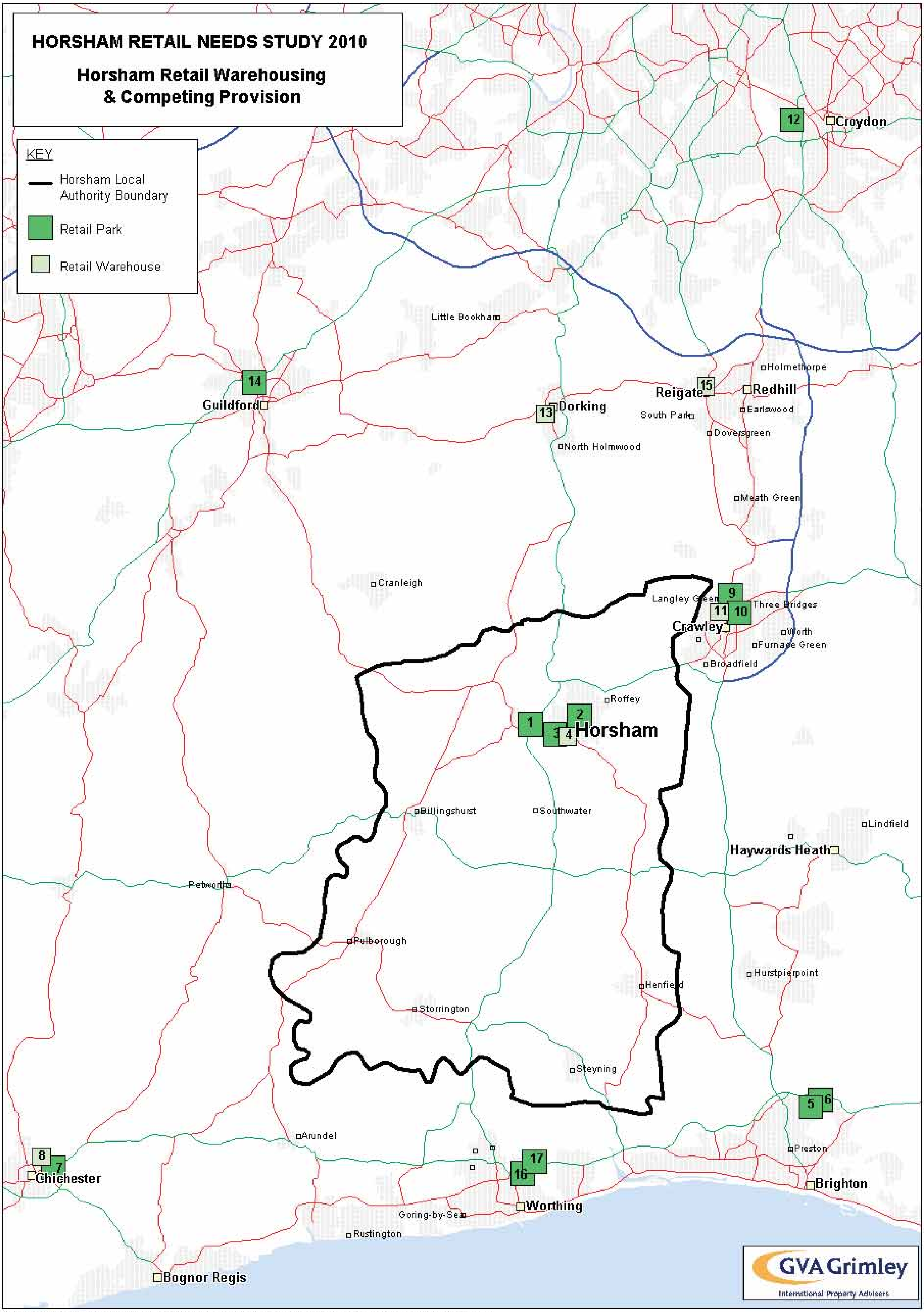
PLAN 9

HORSHAM RETAIL WAREHOUSING & COMPETING PROVISION



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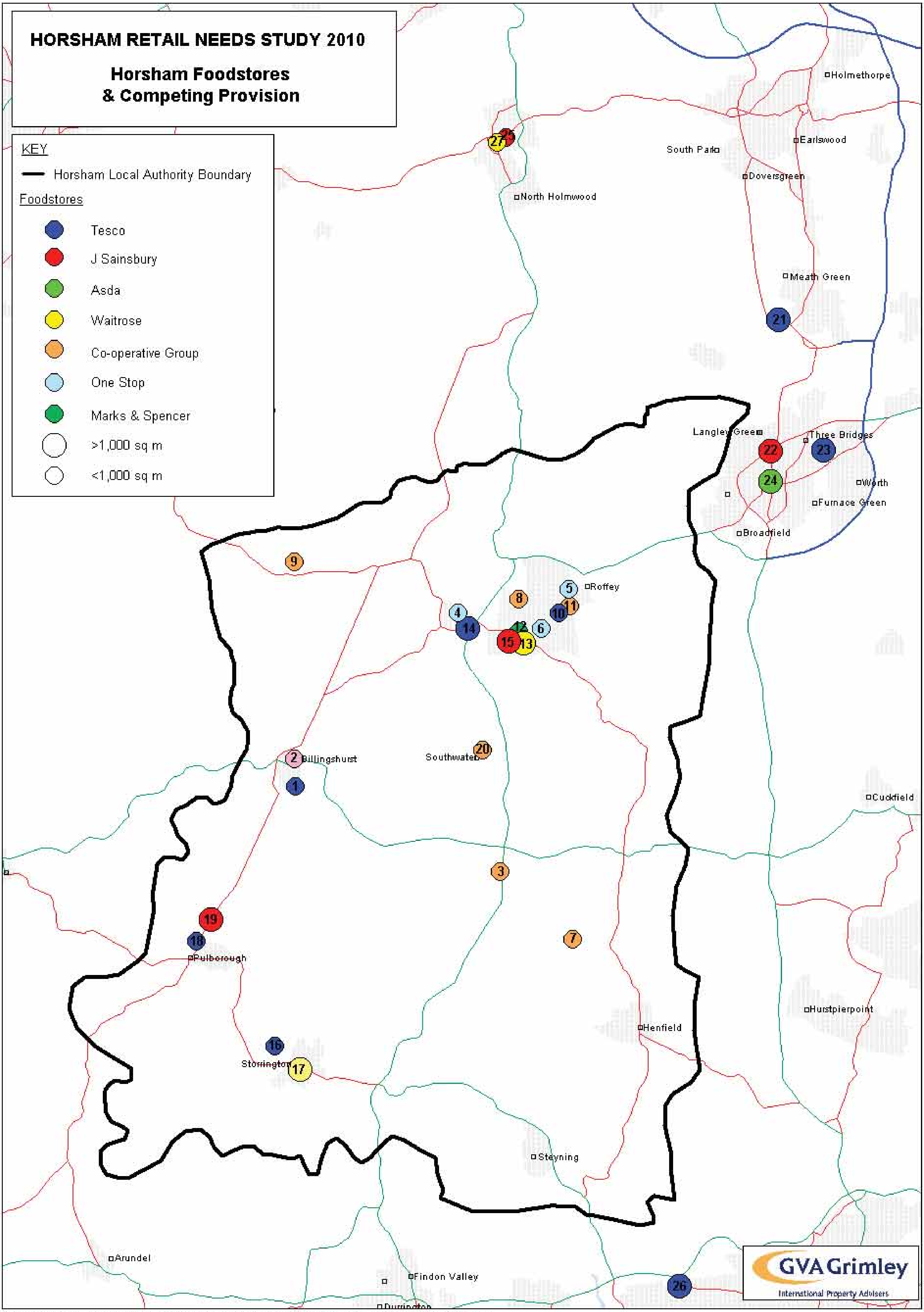
Horsham Retail Warehousing

& Competing Provision

Map Ref	Retail Park / Stand-alone Unit
1	Broadbridge Heath Retail Park *(Homebase, Carpetright, Halfords)*
2	Foundry Retail Park *(Dreams)*
3	Tanbridge Retail Park *(Staples, Currys)*
4	Pets at Home, Horsham
5	Brigton Retail Park, Brighton *(Argos Extra, Next)*
6	Carden Avenue Retail Park, Brighton *(Matalan, Brantano)*
7	Chichester Retail Park, Chichester *(Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets, Staples)*
8	Homebase, Chichester
9	County Oak Retail Park, Crawley *(Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)*
10	London Road Retail Park, Crawley *(Carpetright, B&Q)*
11	Homebase, Crawley
12	Valley Retail Park, Croydon *(DFS, Outfit, Next, Boots, Sports Direct)*
13	Wickes, Dorking
14	Ladymead Retail Park, Guildford *(Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)*
15	Homebase, Reigate
16	Lyons Farm Retail Park, Worthing *(Boots, Brantano, Currys)*
17	Downlands Retail Park, Worthing *(B&Q, Halfords, Paul Simon, Currys)*

PLAN 10

HORSHAM FOODSTORES & COMPETING PROVISION



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Horsham Foodstores & Competing Provision

Map Ref	Store	
1	Tesco Express	2-4 Lower Station Road, Billingshurst
2	Budgens	High Street, Billingshurst
3	Somerfield	Buck Barn Garage, A24/A272 Horsham By Pass, Horsham
4	One Stop	48-50 Billingshurst Road, Broadbridge Heath
5	One Stop	84-86 Lambs Farm Road, Greenfields Estate
6	One Stop	12-14 Station Road, Horsham
7	Welcome	High Street, Partridge Green
8	Welcome	24 North Parade, Warnham Road
9	Co-operative Food	3-6 Martletts Corner, Church Street, Rudgwick
10	Tesco Express	Redkiln Way, Horsham
11	Welcome	2-4 Fitzalan Road, Roffey
12	Marks & Spencer	Swan Walk, Horsham
13	Waitrose	Pirie's Place, Horsham
14	Tesco Extra	Broadbridge Heath Retail Park
15	Sainsbury’s	Worthing Road, Horsham
16	Tesco Express	Pulborough Road, Storrington
17	Waitrose	Old Mill Lane, Storrington
18	Tesco	London Road, Pulborough
19	Sainsbury’s	Stane Street, Pulborough
20	Co-operative Food	Lintot Square, Southwater
21	Tesco Extra	Gatwick, Horley
22	Sainsbury’s	Crawley Avenue, Crawley
23	Tesco Extra	Hazelwick, Crawley
24	Asda	Pegler Way, Crawley
25	Sainsbury’s	32-38 High Street, Dorking
26	Tesco Extra	Holmbush Farm, Shoreham by Sea
27	Waitrose	South Street, Dorking

APPENDICES

APPENDIX 1

COMPETING CENTRES

APPENDIX 1A

KEY INDICATORS

Competing Centres: Key Indicators

Table 1: Javelin Rank		
Centre	**Rank (2009)**	**Change in Rank position 2008**
Brighton	9	-2
Guildford	24	-5
Crawley	70	-15
Worthing	94	-15
Horsham	**150**	**-10**
Source: Venue Score/Javelin 2009		

Table 2: Retail Floorspace	
Centre	**Sqm Gross**
Brighton	217,226
Worthing	118,226
Guildford	114,373
Crawley	105,073
Horsham	**86,576**
Source: Goad Category Reports	

Table 3: % Unit Composition				
Centre	**Comparison**	**Convenience**	**Service**	**Vacant**
Guildford	46%	6%	37%	11%
Horsham	**41%**	**7%**	**44%**	**8%**
Crawley	41%	6%	41%	12%
Brighton	39%	7%	45%	9%
Worthing	35%	7%	43%	14%
UK	34%	9%	46%	11%
Source: Goad Category Reports				

Table 4:% Floorspace Composition				
Centre	**Comparison**	**Convenience**	**Service**	**Vacant**
Crawley	56%	10%	26%	8%
Guildford	**53%**	**3%**	**35%**	**9%**
Horsham	**50%**	**14%**	**31%**	**5%**
Worthing	43%	12%	36%	9%
Brighton	37%	6%	50%	7%
UK	38%	14%	39%	10%
Source: Goad Category Reports				

Competing Centres: Key Indicators

Table 5: Comparison Goods Trade Draw %	
Centre	**%**
Horsham	**23.8%**
Crawley	21.5%
Worthing	5.8%
Guildford	5.1%
Brighton	2.6%

Source: GVA Grimley Modelling

Table 6: Comparison Goods Trade Draw £m	
Centre	**£m**
Horsham	**£229,369**
Crawley	£206,862
Worthing	£56,013
Guildford	£48,900
Brighton	£25,089

Source: GVA Grimley Modelling

Table 7: Comparison of Prime Retail Yields (% Change)			
Centre	**2005 %**	**2008 %**	**% Change**
Guildford	4.5%	4.25%	-0.25%
Worthing	5.65	5%	-0.65%
Brighton	5.5%	5.25%	-0.25%
Horsham	**5.5%**	**5.25%**	**-0.25%**
Crawley	5.5%	5.5%	0%

Source: Valuation Office Agency – Property Market Report

Table 8: Comparison of Prime Retail Rents (£ per sqm)			
Centre	**£ 2006**	**£ 2009**	**Service**
Guildford	£2,583	£2,583	0%
Brighton	**£2,045**	**£1,938**	**-5%**
Crawley	£1,507	£1,076	-29%
Worthing	£1,238	£1,023	-17%
Horsham	**£1,130**	**£861**	**-24%**

Source: Colliers In Town Retail Rents 2009

Competing Centres: Key Indicators

Table 8: Retailer Demand, March 2010	
Centre	**No. of Requirements**
Guildford	107
Brighton	99
Crawley	26
Worthing	23
Horsham	**17**

Source: Focus (March 2010)

Table 9: Distance from Horsham		
Centre	**Miles (approx.)**	**Kilometres (approx.)**
Crawley	8.5	13.7
Guildford	20.7	33.3
Worthing	19.8	31.9
Brighton	25.7	41.4
Horsham	**-**	**-**

Source: GVA Grimley

APPENDIX 1B

RETAILER REPRESENTATION

Competing Centres: Retailer Representation

Centre	*Shopping Centres*	*Key Anchors*	*Department Stores*
Brighton	Churchill Square (opened 1968) c.43,660 sqm gross	Debenhams, Bhs, Marks & Spencer, Primark	Debenhams, Bhs
Crawley	County Mall (opened 1992) c.41,800 sqm gross	Debenhams, TJ Hughes, Marks & Spencer, TK Maxx, Bhs, Waterstones, Boots, WH Smith, Asda, Sainsbury	Debenhams, Bhs, TJ Hughes
Guildford	Friary Centre (opened 1980) c.13,935 sqm gross Tunsgate Square (opened 1989) c.8,175 sqm gross White Lion Walk (opened 1986) c.4,273 sqm gross	House of Fraser, Debenhams, Bhs, Marks & Spencer, Next, Gap, Burton, Topshop, Boots	House of Fraser, Debenhams, Bhs
Horsham	**Swan Walk (opened 1975) c.23,225 sqm gross** **Springfield Court (opened 1989) c.6,500 sqm gross** **Piries Place (opened 1991) c. 4,645 sqm gross**	**Beales, Bhs, Marks & Spencer, J Sainsbury, Waitrose, TK Maxx, Argos, Boots, Wikinson**	**Beales, Bhs**
Worthing	Montague Centre (opened 1990) c.6,500 sqm gross Guildbourne Centre (opened 1973) c.5,388 sqm gross	Beales, Debenhams, Marks & Spencer, Bhs, Iceland, Somerfield, Waitrose, Wilkinson, TK Maxx, Morrisons	Beales, Debenhams, Bhs

Source: Promis/EGI/Goad/GVA Grimley, March 2010

APPENDIX 1C

PIPELINE SCHEMES

Key Town Centre Pipeline Schemes

Brighton

- Full planning permission has been granted for the i360 development which will consist of a 183 metre landmark observation tower by the West Pier. There will also be some ancillary retail comprising approximately 1,800 sqm gross floorspace.
- Full planning permission has been granted for the Churchill Square Extension, comprising an extension to the Next unit of approximately 1,800 sqm gross retail floorspace. This is to be progressed as part of a comprehensive scheme with the Brighton Centre.
- Planning guidance was adopted in 2005 proposing the redevelopment of the Brighton Centre and conference and concert hall to provide a mixed use retail, hotel, leisure and residential development, potentially including an extension to the Churchill Centre. Council are in partnership with Standard Life. Uncertain how much retail floorspace may be delivered at this point. Work has not yet started on a concept scheme. The plan is to extend Churchill Square by at least 20,000 sqm.
- Sackville Trading Estate redevelopment as retail/residential – granted / Parkridge developer

Crawley

- An application was submitted in May 2009 for a 2,300 sqm gross mezzanine extension to the Asda superstore on Pegler Way, west of the town centres. However, this was subsequently withdrawn due to concerns over the scale of the car park.
- An application was submitted by T&L Crawley in January 2009 for 3,997 sqm gross A1 retail food store and 6,200 sqm gross offices at County Oak Business Centre, Betts Way, Crawley. A decision is due in April 2010.
- An application is expected for the redevelopment of part of Crawley town centre north. Grosvenor has been selected as the development partner and is currently preparing a Masterplan. The redevelopment is likely to include a 23,000 sqm gross John Lewis anchor and a further 65,00 sqm gross retail floorspace. The scheme is currently being revised due to the impact of the recession on values.

Guildford

- Full planning permission has been granted for an extension to the Friary Centre. This will deliver 25,000 sqm gross retail floorspace in approximately 70 shop units. The plans also include 170 apartments, a public square, community facilities and refurbishment of the bus station. In addition, the existing Friary Centre is to be refurbished and improvements made to North Street. An application has been submitted to extend the time limit for implementation.

Worthing

- Outline planning permission has been granted for the Teville Gate scheme – the redevelopment of the former centre for retail, including a foodstore, A3 and A4 use units, a multiplex, a bowling alley, a bingo hall and residential. The development will deliver approximately 2,300 sqm gross retail floorspace.
- There have been pre-application discussions regarding the development of a site incorporating the Guidlbourne Centre. A development brief has been adopted. The development may deliver approximately 40,000 sqm gross retail floorspace.
- An application has been submitted for the change of use of the ground floor of the former Lloyds Bank building to provide 1,175 gross retail floorspace (A1, A3 and A5 use).
- Permission has been granted for a new District Centre at Durrington, comprising a 13,138 sqm gross floorspace Tesco store with smaller shop units and associated parking. Conditions are currently being discharged.

Source: Promis and GVA Grimley, 2010

APPENDIX 2

HORSHAM TOWN CENTRE HEALTH CHECK

APPENDIX 2A

RETAILER REQUIREMENTS

Horsham Town Centre: Retailer Requirements

	Fascia	Description	Retail Category	Retail Use Class	Min. Floorspace sqm gross	Max. Floorspace sqm gross
1	The Blue Cross	Charity shops	Comparison	A1	46	93
2	Card Factory	Greeting cards	Comparison	A1	79	139
3	Sportec	Sports goods	Comparison	A1	93	372
4	Gerry Weber	Ladies wear & accessories	Comparison	A1	111	279
5	PamPurredPets	Other comparison goods	Comparison	A1	139	929
6	Lakeland Ltd	Household goods	Comparison	A1	279	465
7	Sussex Bed Centre	Furniture general	Comparison	A1	372	929
8	Peacocks	Clothing general	Comparison	A1	418	511
9	Desire by Debenhams	Clothing general	Comparison	A1	1,858	2,323
10	TJ Hughes Ltd	Department & variety store	Comparison	A1	2,323	13,935
				Sub-total	**5,718**	**19,974**
1	Millies Cookies	Bakers & confectioners	Service	A1	28	46
2	Caffe Nero	Café	Service	A3	74	186
3	Rush Hair	Health & beauty	Service	A1	84	139
4	Headmasters	Health & beauty	Service	A1	93	186
5	Insurance	Legal services	Service	A2	116	465
6	Cafe Rouge Ltd	Restaurant	Service	A3	232	325
7	Frankie & Benny's	Restaurant	Service	A3	325	465
				Sub-total	**952**	**1,812**
				TOTAL	**6,670**	**21,785**

Source: Focus Property Database, 2010

APPENDIX 2B

FOODSTORE REPRESENTATION

Horsham Town Centre: Foodstore Representation

Store (location)	Size (sqm net)	Date of Opening	% Non-food	Deli	Bakery	Café	Hot food Counter	Pharmacy	Fish Monger	Butcher	Other	ATM	Parking	Petrol Station
Waitrose, Piries Place	1,347	1990	5%	✓	✓	✗	✗	✗	✓	✓	✗	✓	Piries Place car park maximum stay 4 hours charges apply	✗
M&S Simply Food, Swan Walk	832	1984	0%	✗	✓	✓	✗	✗	✗	✗	✗	✓	Swan Walk car park charges apply	✗
Sainsbury's, Worthing Road	4,544	1995	10%	✓	✓	✓	✓	✓	✓	✓	Dry Cleaner	✓	Customers pay for parking over 2 hours	✓

Source: GVA Grimley//IGD

APPENDIX 2C

TOWN CENTRE SWOT ANALYSIS

Horsham Town Centre: SWOT Analysis

STRENGTHS / OPPORTUNITIES	WEAKNESSES / THREATS

- Above average representation from comparison retailers (+7.65%);
- Below average number of vacant units (-3.51%);
- Good range of service provision;
- Consistent and strong yield since 2000 suggesting on-going investor confidence and town centre viability;
- Strong representation from key multiple retailers which equate to 53.7% of all retailers;
- Major anchors include M&S, Beales, BHS and Wilkinson;
- Boutique shops and independent retailers create a unique variety which complements the more mainstream shopping offer;
- Reflecting the strong comparison retail offer, non-food shopping was cited as the main purpose of visits to the centre and 70% of intended purchases related to comparison goods;
- There are two shopping centres:
    o Swan Walk is a more modern development which offers a pleasant, covered shopping environment;
    o Piries Place is an open-air precinct which has a more specialist retail offer;
- Other focal areas include:
    o West Street – the traditional high street;
    o Carfax – a large open square with historic pleasantries and more service orientated;
    o The Forum – newest development in the centre provides large format units and accommodates the centre's department store offer;
    o East Street and surrounds – concentration of restaurants and other uses that contribute to both daytime and evening economies;
- Strong convenience store offer anchored by Waitrose and Sainsbury's. There is also an M&S Simply Food in the M&S department store;
- The centre's rank in terms of retailer requirements (now 66th) has improved significantly since 2007 when it was 137th reflecting an uplift in appeal to retailers;
- Current requirements come from a range of operators including some high-end/quality retailers (e.g. Gerry Weber and Lakeland);
- New operators moving in include Ask and Carluccio's restaurant chains;
- Horsham is well connected to the road network and benefits from good links by public transport;
- The centre is clean and well-maintained and there is clear evidence of on-going investment in the public realm;
- The centre's historic qualities have been well-harnessed to create a unique shopping environment which also sits well with more modern additions;
- Reasonable frequency of visits – the majority visit once a week (33%) whilst 31.2% visit 2-3 times a week;
- The centre also has reasonable dwell times with the majority of visitors remaining in the centre for 2-3 hours;
- Scope to improve legibility between different focal points in the centre e.g. through improved signage and clear, well-lit walkways that will entice people through to explore different areas;
- Potential to add to the niche boutique retail offer and attract retailers that are less likely to require larger format units and suitable to accommodate vacant units in Swan Walk;
- Good range of leisure facilities and opportunity to build on the existing eating/drinking function on East Street and café culture at Carfax.
	- There is below average representation from convenience retailers (-1.94%);
	- Prime Zone A rents have experienced a 23.8% fall between 2008 and 2009. Although this is consistent with national trends and effects of the recession;
	- Retailer requirements have fallen since 2007;
	- There are no registered requirements from convenience retailers;
	- The number of vacant units has increased since previous study in 2005 and there are several vacant units in Swan Walk Shopping Centre – potentially due to the small scale of units that may be less suitable to fulfil modern retailer requirements;
	- The random and disorderly composition of the centre impedes legibility, although this is only likely to be problematic for tourists and infrequent visitors;
	- The centre has a limited role in terms of tourism;
	- Over half of visitors travel by car, less than 10% travel by bus/coach and less than 5% travel by train;
	- 18.3% dislike the lack of / expensive car parking provision in the centre;
	- Large vacant public house on the corner of East Street and Carfax has a dominating presence which detracts from the environment (although soon to be occupied by Ask);
	- Limited physical opportunity to expand the centre's retail core to accommodate new retail development or create larger format units;
	- Increasing vacant units in Swan Walk could create a less desirable shopping environment to shoppers and retailers alike;
	- On-going lack of legibility could marginalise and undermine the role and function of different areas in the centre.

APPENDIX 3

CONVENIENCE GOODS CAPACITY PROJECTIONS

HORSHAM RETAIL NEEDS STUDY 2010

Table 1: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	41,116	19,706	29,266	96,211	5,416	8,736	14,480	32,748	11,933	6,206	17,788	13,360	12,110	19,305	**328,381**
2015	42,376	20,037	31,321	99,392	5,681	9,191	15,389	34,418	12,350	6,520	18,095	13,584	12,443	20,069	**340,866**
2020	43,764	20,417	33,190	102,879	5,953	9,671	16,373	36,280	12,774	6,816	18,527	13,903	12,750	20,779	**354,076**
2025	45,374	20,988	35,212	106,458	6,190	10,260	17,425	38,271	13,330	7,148	19,160	14,358	13,090	21,500	**368,764**
2026	45,793	21,129	35,563	107,241	6,245	10,378	17,624	38,629	13,433	7,214	19,301	14,442	13,152	21,667	**371,811**

Source: Experian Business Solutions, March 2010

Table 1A: Population Growth Rates

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010-2015 (%)	3.1	1.7	7.0	3.3	4.9	5.2	6.3	5.1	3.5	5.1	1.7	1.7	2.7	4.0	3.8
2010-2020 (%)	6.4	3.6	13.4	6.9	9.9	10.7	13.1	10.8	7.0	9.8	4.2	4.1	5.3	7.6	7.8
2010-2025 (%)	10.4	6.5	20.3	10.7	14.3	17.4	20.3	16.9	11.7	15.2	7.7	7.5	8.1	11.4	12.3
2010-2026 (%)	11.4	7.2	21.5	11.5	15.3	18.8	21.7	18.0	12.6	16.2	8.5	8.1	8.6	12.2	13.2

Source: Experian Business Solutions, March 2010

Table 1B: Survey Area Postcodes

ZONE	POSTCODES
1	GU5 9, RH2 8, RH3 7, RH4 1/2/3, RH5 4/6,
2	GU6 7/8, RH5 5
3	RH12 3/4/5
4	RH6 0/7/8, RH10 1/5/6/8/9, RH11 0/6/7/8/9
5	RH14 0
6	RH14 9
7	RH13 0/9
8	RH12 1/2, RH13 5/6
9	RH17 5/6
10	RH13 8
11	BN5 9, BN44 3
12	RH20 3/4
13	RH20 1/2
14	BN13 3, BN14 0, BN18 9

HORSHAM RETAIL NEEDS STUDY 2010

Table 2: Convenience Goods Retail Expenditure Forecasts Per Capita (2008 Prices)

	Growth in Per Capita Expenditure: 0.5% pa 0.1% pa 1.0% pa 0.5% pa													
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2008	2,066	2,075	2,026	1,857	2,195	1,984	1,952	2,045	1,967	2,076	2,113	2,035	2,204	2,060
2008 (Minus SFT at 3%)	2,004	2,013	1,965	1,801	2,129	1,924	1,893	1,984	1,908	2,014	2,050	1,974	2,138	1,998
2009	2,076	2,085	2,036	1,866	2,206	1,994	1,962	2,055	1,977	2,086	2,124	2,045	2,215	2,070
2009 (Minus SFT at 3.5%)	2,004	2,012	1,965	1,801	2,129	1,924	1,893	1,983	1,908	2,013	2,049	1,974	2,137	1,998
2010	2,078	2,087	2,038	1,868	2,208	1,996	1,964	2,057	1,979	2,088	2,126	2,047	2,217	2,072
2010 (Minus SFT at 3.8%)	1,999	2,008	1,961	1,797	2,124	1,920	1,889	1,979	1,904	2,009	2,045	1,969	2,133	1,994
2015	2,184	2,194	2,142	1,963	2,321	2,098	2,064	2,162	2,080	2,195	2,234	2,152	2,330	2,178
2015 (Minus SFT at 4.8%)	2,080	2,089	2,039	1,869	2,209	1,997	1,965	2,058	1,980	2,090	2,127	2,048	2,218	2,074
2020	2,240	2,249	2,196	2,013	2,379	2,151	2,116	2,217	2,132	2,250	2,291	2,206	2,389	2,233
2020 (Minus SFT at 5.2%)	2,123	2,132	2,082	1,908	2,256	2,039	2,006	2,102	2,021	2,133	2,171	2,091	2,265	2,117
2025	2,296	2,306	2,252	2,064	2,440	2,205	2,169	2,273	2,186	2,307	2,348	2,262	2,450	2,289
2025 (Minus SFT at 5.4%)	2,172	2,182	2,130	1,952	2,308	2,086	2,052	2,150	2,068	2,183	2,222	2,140	2,317	2,166
2026	2,308	2,318	2,263	2,074	2,452	2,216	2,180	2,284	2,197	2,319	2,360	2,273	2,462	2,301
2026 (Minus SFT at 5.5%)	2,181	2,190	2,138	1,960	2,317	2,094	2,060	2,159	2,076	2,191	2,230	2,148	2,326	2,174

Source: Experian Business Solutions, March 2010

Table 3: Total Survey Area Convenience Goods Retail Expenditure (£000) 2008 Prices

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	82,208	39,572	57,382	172,907	11,505	16,774	27,354	64,812	22,716	12,469	36,375	26,312	25,830	38,487	634,702
2015	88,124	41,850	63,873	185,784	12,552	18,355	30,237	70,847	24,452	13,624	38,486	27,825	27,605	41,614	685,227
2020	92,917	43,537	69,102	196,329	13,428	19,718	32,844	76,244	25,821	14,541	40,230	29,075	28,878	43,988	726,652
2025	98,559	45,788	75,005	207,849	14,285	21,402	35,761	82,285	27,567	15,602	42,565	30,720	30,333	46,566	774,286
2026	99,861	46,277	76,051	210,203	14,469	21,733	36,312	83,382	27,890	15,808	43,047	31,021	30,596	47,112	783,761

Source: Tables 1 and 2

Table 4: Sainsbury's, Horsham Town Centre: Convenience Goods Allocation - % Market Share

Sainsbury's, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	1%	13%	28%	0%	5%	2%	21%	46%	5%	42%	0%	8%	4%	0%
2015	1%	13%	28%	0%	5%	2%	21%	46%	5%	42%	0%	8%	4%	0%
2020	1%	13%	28%	0%	5%	2%	21%	46%	5%	42%	0%	8%	4%	0%
2025	1%	13%	28%	0%	5%	2%	21%	46%	5%	42%	0%	8%	4%	0%
2026	1%	13%	28%	0%	5%	2%	21%	46%	5%	42%	0%	8%	4%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 5: Sainsbury's, Horsham Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Sainsbury's, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	987	5,075	15,967	-	569	252	5,806	29,765	1,130	5,178	145	2,230	982	-	68,085
2015	1,057	5,367	17,773	-	621	275	6,418	32,537	1,216	5,658	154	2,358	1,049	-	74,484
2020	1,115	5,584	19,228	-	665	296	6,971	35,015	1,285	6,038	161	2,464	1,097	-	79,918
2025	1,183	5,872	20,870	-	707	321	7,590	37,789	1,371	6,479	170	2,603	1,153	-	86,109
2026	1,198	5,935	21,161	-	716	326	7,707	38,293	1,388	6,564	172	2,629	1,163	-	87,253

Source: Tables 3 and 4

Table 6: Waitrose, Horsham Town Centre: Convenience Goods Allocation - % Market Share

Waitrose, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	1%	2%	6%	0%	2%	1%	0%	18%	0%	2%	0%	3%	2%	0%
2015	1%	2%	6%	0%	2%	1%	0%	18%	0%	2%	0%	3%	2%	0%
2020	1%	2%	6%	0%	2%	1%	0%	18%	0%	2%	0%	3%	2%	0%
2025	1%	2%	6%	0%	2%	1%	0%	18%	0%	2%	0%	3%	2%	0%
2026	1%	2%	6%	0%	2%	1%	0%	18%	0%	2%	0%	3%	2%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 7: Waitrose, Horsham Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Waitrose, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	987	653	3,701	-	259	189	-	11,569	-	309	-	756	581	-	19,003
2015	1,057	691	4,120	-	282	206	-	12,646	-	337	-	800	621	-	20,761
2020	1,115	718	4,457	-	302	222	-	13,610	-	360	-	836	650	-	22,270
2025	1,183	755	4,838	-	321	241	-	14,688	-	386	-	883	682	-	23,978
2026	1,198	764	4,905	-	326	244	-	14,884	-	391	-	892	688	-	24,292

Source: Tables 3 and 6

Table 8: Marks and Spencer Foodhall, Horsham Town Centre: Convenience Goods Allocation - % Market Share

M&S Foodhall, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	1%	0%	2%	0%	0%	5%	2%	0%	1%	0%	0%	0%
2015	0%	0%	1%	0%	2%	0%	0%	5%	2%	0%	1%	0%	0%	0%
2020	0%	0%	1%	0%	2%	0%	0%	5%	2%	0%	1%	0%	0%	0%
2025	0%	0%	1%	0%	2%	0%	0%	5%	2%	0%	1%	0%	0%	0%
2026	0%	0%	1%	0%	2%	0%	0%	5%	2%	0%	1%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 9: Marks and Spencer Foodhall, Horsham Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

M&S Foodhall, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	178	488	-	181	-	-	3,176	443	-	436	-	-	-	4,902
2015	-	188	543	-	198	-	-	3,472	477	-	462	-	-	-	5,339
2020	-	196	587	-	211	-	-	3,736	504	-	483	-	-	-	5,717
2025	-	206	638	-	225	-	-	4,032	538	-	511	-	-	-	6,149
2026	-	208	646	-	228	-	-	4,086	544	-	517	-	-	-	6,229

Source: Tables 3 and 8

Table 10: Local Shops, Horsham Town Centre: Convenience Goods Allocation - % Market Share

Local Shops, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	6%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%
2015	0%	0%	6%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%
2020	0%	0%	6%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%
2025	0%	0%	6%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%
2026	0%	0%	6%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 11: Local Shops, Horsham Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Local Shops, Horsham	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	3,457	-	129	-	-	1,523	-	-	-	-	-	-	5,110
2015	-	-	3,848	-	141	-	-	1,665	-	-	-	-	-	-	5,654
2020	-	-	4,163	-	151	-	-	1,792	-	-	-	-	-	-	6,106
2025	-	-	4,519	-	161	-	-	1,934	-	-	-	-	-	-	6,613
2026	-	-	4,582	-	163	-	-	1,959	-	-	-	-	-	-	6,704

Source: Tables 3 and 10

Table 12: Tesco Broadbridge Heath (Out-of-Centre): Convenience Goods Allocation - % Market Share

Tesco, Broadbridge Heath	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	3%	23%	41%	2%	20%	22%	48%	14%	1%	22%	1%	13%	3%	0%
2015	3%	23%	41%	2%	20%	22%	48%	14%	1%	22%	1%	13%	3%	0%
2020	3%	23%	41%	2%	20%	22%	48%	14%	1%	22%	1%	13%	3%	0%
2025	3%	23%	41%	2%	20%	22%	48%	14%	1%	22%	1%	13%	3%	0%
2026	3%	23%	41%	2%	20%	22%	48%	14%	1%	22%	1%	13%	3%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 13: Tesco Broadbridge Heath (Out-of-Centre): Convenience Goods Allocation - Spend (£000) 2008 Prices

Tesco, Broadbridge Heath	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	2,384	9,141	23,541	3,285	2,321	3,673	13,164	9,284	256	2,696	436	3,493	872	-	74,548
2015	2,556	9,667	26,204	3,530	2,532	4,020	14,551	10,149	275	2,946	462	3,694	932	-	81,518
2020	2,695	10,057	28,349	3,730	2,709	4,318	15,806	10,922	290	3,145	483	3,860	975	-	87,339
2025	2,858	10,577	30,771	3,949	2,882	4,687	17,210	11,787	310	3,374	511	4,078	1,024	-	94,018
2026	2,896	10,690	31,200	3,994	2,919	4,760	17,475	11,944	314	3,418	517	4,118	1,033	-	95,277

Source: Tables 3 and 12

Table 14: Budgens, Billingshurst Town Centre: Convenience Goods Allocation - % Market Share

Budgens Billingshurst	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	7%	24%	0%	0%	0%	0%	0%	0%	0%	0%
2015	0%	0%	0%	0%	7%	24%	0%	0%	0%	0%	0%	0%	0%	0%
2020	0%	0%	0%	0%	7%	24%	0%	0%	0%	0%	0%	0%	0%	0%
2025	0%	0%	0%	0%	7%	24%	0%	0%	0%	0%	0%	0%	0%	0%
2026	0%	0%	0%	0%	7%	24%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 15: Budgens, Billingshurst Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Budgen's Billingshurst	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	843	4,051	123	-	-	50	-	-	-	-	5,067
2015	-	-	-	-	919	4,433	136	-	-	54	-	-	-	-	5,543
2020	-	-	-	-	984	4,762	148	-	-	58	-	-	-	-	5,951
2025	-	-	-	-	1,046	5,169	161	-	-	62	-	-	-	-	6,438
2026	-	-	-	-	1,060	5,249	163	-	-	63	-	-	-	-	6,535

Source: Tables 3 and 14

Table 16: Co-Op, Southwater Town Centre: Convenience Goods Allocation - % Market Share

Co-Op, Southwater	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	14%	0%	0%	1%	0%	0%	0%	0%
2015	0%	0%	0%	0%	0%	0%	14%	0%	0%	1%	0%	0%	0%	0%
2020	0%	0%	0%	0%	0%	0%	14%	0%	0%	1%	0%	0%	0%	0%
2025	0%	0%	0%	0%	0%	0%	14%	0%	0%	1%	0%	0%	0%	0%
2026	0%	0%	0%	0%	0%	0%	14%	0%	0%	1%	0%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 17: Co-Op, Southwater Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Co-Op, Southwater	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	3,836	-	-	97	-	125	-	-	4,058
2015	-	-	-	-	-	-	4,241	-	-	106	-	132	-	-	4,478
2020	-	-	-	-	-	-	4,606	-	-	113	-	138	-	-	4,857
2025	-	-	-	-	-	-	5,015	-	-	121	-	146	-	-	5,282
2026	-	-	-	-	-	-	5,093	-	-	123	-	147	-	-	5,363

Source: Tables 3 and 16

Table 18: Henfield: Convenience Goods Allocation - % Market Share

Henfield Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	22%	0%	0%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	22%	0%	0%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	22%	0%	0%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	22%	0%	0%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	22%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 19: Henfield: Convenience Goods Allocation - Spend (£000) 2008 Prices

Henfield Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	123	-	346	243	8,112	-	-	-	8,824
2015	-	-	-	-	-	-	136	-	373	266	8,582	-	-	-	9,357
2020	-	-	-	-	-	-	148	-	394	284	8,971	-	-	-	9,796
2025	-	-	-	-	-	-	161	-	420	304	9,492	-	-	-	10,378
2026	-	-	-	-	-	-	163	-	425	308	9,600	-	-	-	10,496

Source: Tables 3 and 18

Table 20: Steyning: Convenience Goods Allocation - % Market Share

Steyning Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 21: Steyning: Convenience Goods Allocation - Spend (£000) 2008 Prices

Steyning Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	-	-	-	-	3,265	-	-	-	3,265
2015	-	-	-	-	-	-	-	-	-	-	3,454	-	-	-	3,454
2020	-	-	-	-	-	-	-	-	-	-	3,611	-	-	-	3,611
2025	-	-	-	-	-	-	-	-	-	-	3,820	-	-	-	3,820
2026	-	-	-	-	-	-	-	-	-	-	3,863	-	-	-	3,863

Source: Tables 3 and 20

Table 22: Sainsbruy's, Codmore Hill: Convenience Goods Allocation - % Market Share

Sainsbury's, Codmore Hill	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	15%	17%	0%	0%	0%	0%	0%	7%	20%	2%
2015	0%	0%	0%	0%	15%	17%	0%	0%	0%	0%	0%	7%	20%	2%
2020	0%	0%	0%	0%	15%	17%	0%	0%	0%	0%	0%	7%	20%	2%
2025	0%	0%	0%	0%	15%	17%	0%	0%	0%	0%	0%	7%	20%	2%
2026	0%	0%	0%	0%	15%	17%	0%	0%	0%	0%	0%	7%	20%	2%

Source: Horsham Household Telephone Survey, February 2010

Table 23: Sainsbruy's, Codmore Hill: Convenience Goods Allocation - Spend (£000) 2008 Prices

Sainsbury's, Codmore Hill	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	1,746	2,768	-	-	-	-	-	1,723	5,289	866	12,392
2015	-	-	-	-	1,905	3,029	-	-	-	-	-	1,823	5,652	936	13,344
2020	-	-	-	-	2,038	3,253	-	-	-	-	-	1,904	5,913	990	14,098
2025	-	-	-	-	2,168	3,531	-	-	-	-	-	2,012	6,211	1,048	14,970
2026	-	-	-	-	2,196	3,586	-	-	-	-	-	2,032	6,265	1,060	15,138

Source: Tables 3 and 22

Table 24: Pulborough Local Shops: Convenience Goods Allocation - % Market Share

Pulborough Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 25: Pulborough Local Shops: Convenience Goods Allocation - Spend (£000) 2008 Prices

Pulborough Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	-	-	-	-	-	-	1,556	-	1,556
2015	-	-	-	-	-	-	-	-	-	-	-	-	1,663	-	1,663
2020	-	-	-	-	-	-	-	-	-	-	-	-	1,740	-	1,740
2025	-	-	-	-	-	-	-	-	-	-	-	-	1,828	-	1,828
2026	-	-	-	-	-	-	-	-	-	-	-	-	1,843	-	1,843

Source: Tables 3 and 24

Table 26: Tesco Express, Storrington: Convenience Goods Allocation - % Market Share

Tesco Express, Storrington	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	3%	11%	0%	0%	0%	0%	0%	4%	3%	0%
2015	0%	0%	0%	0%	3%	11%	0%	0%	0%	0%	0%	4%	3%	0%
2020	0%	0%	0%	0%	3%	11%	0%	0%	0%	0%	0%	4%	3%	0%
2025	0%	0%	0%	0%	3%	11%	0%	0%	0%	0%	0%	4%	3%	0%
2026	0%	0%	0%	0%	3%	11%	0%	0%	0%	0%	0%	4%	3%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 27: Tesco Express, Storrington: Convenience Goods Allocation - Spend (£000) 2008 Prices

Tesco Express, Storrington	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	360	1,799	-	-	-	-	-	1,059	736	-	3,954
2015	-	-	-	-	392	1,969	-	-	-	-	-	1,120	787	-	4,267
2020	-	-	-	-	420	2,115	-	-	-	-	-	1,170	823	-	4,528
2025	-	-	-	-	446	2,295	-	-	-	-	-	1,236	864	-	4,843
2026	-	-	-	-	452	2,331	-	-	-	-	-	1,249	872	-	4,904

Source: Tables 3 and 26

Table 28: Somerfield, Storrington: Convenience Goods Allocation - % Market Share

Somerfield, Storrington	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	2%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	2%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	2%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	2%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	2%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 29: Somerfield, Storrington: Convenience Goods Allocation - Spend (£000) 2008 Prices

Somerfield, Storrington	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	-	-	-	-	-	2,532	400	-	2,933
2015	-	-	-	-	-	-	-	-	-	-	-	2,678	428	-	3,106
2020	-	-	-	-	-	-	-	-	-	-	-	2,798	448	-	3,246
2025	-	-	-	-	-	-	-	-	-	-	-	2,957	470	-	3,427
2026	-	-	-	-	-	-	-	-	-	-	-	2,986	474	-	3,460

Source: Tables 3 and 28

Table 30: Storrington Local Shops: Convenience Goods Allocation - % Market Share

Storrington Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 31: Storrington Local Shops: Convenience Goods Allocation - Spend (£000) 2008 Prices

Storrington Local Shops	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	-	-	-	-	-	4,519	110	154	4,783
2015	-	-	-	-	-	-	-	-	-	-	-	4,779	117	166	5,063
2020	-	-	-	-	-	-	-	-	-	-	-	4,994	123	176	5,292
2025	-	-	-	-	-	-	-	-	-	-	-	5,276	129	186	5,591
2026	-	-	-	-	-	-	-	-	-	-	-	5,328	130	188	5,646

Source: Tables 3 and 30

Table 32: Horsham Existing Convenience Goods Floorspace 2010

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
Horsham Town Centre					
Sainsbury's	4,544	90%	4,090	9,990	40,855
Waitrose	1,347	95%	1,280	11,869	15,188
M&S Foodhall	832	100%	832	11,686	9,723
Other Local Stores	606	95%	576	5,000	2,879
Sub Total	7,329	-	6,777	10,129	68,645
Billinghurst Village Centre					
Budgens	567	100%	567	6,953	3,942
Southwater Village Centre					
Co-Op	515	100%	515	6,953	3,581
Henfield Village Centre					
Henfield Local Shops	511	100%	511	6,953	3,553
Steyning Village Centre					
Steyning Local Shops	876	100%	876	6,953	6,088
Pulborough Village Centre					
Pulborough Local Shops	175	100%	175	5,000	876
Storrington Village Centre					
Somerfield	480	100%	480	8,058	3,865
Storrington Local Shops	562	100%	562	5,000	2,808
Sub Total	1,041	-	655	11,529	7,548
Out-of-Centre					
Tesco, Broadbridge Heath	3,555	75%	2,666	12,883	34,349
Sainsbury's, Stane Street (outside Pulborough)	1,414	100%	1,414	9,990	14,131
Tesco Express, Pulborough Road (outside Storrington)	155	100%	155	12,883	1,996
TOTAL	16,138	-	14,698	9,786	143,833

Source: IGD Database, 2009

Table 33: Horsham District Global Convenience Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Available Convenience Goods Expenditure (£000)	634,702	685,227	726,652	774,286	783,761
Horsham, Broadbridge, Billingshurst and Southwater Market Share	34	35	35	35	35
Total Convenience Goods Turnover in Horsham District (£000)	218,478	238,032	254,469	273,444	277,004
Total Existing Convenience Goods Floorspace (sqm net)	14,698	14,698	14,698	14,698	14,698
Sales per sqm net (£)	14,865	9,786	10,033	10,287	10,338
Sales from Existing Floorspace (£000)	218,478	143,833	147,465	151,189	151,945
Residual Spending to Support New Shops (£000)	-	94,199	107,004	122,255	125,060
Sales per sqm net in new shops (£) Based on Large Store Format	10,000	10,202	10,459	10,723	10,777
Capacity for new Convenience Floorspace (sqm net)	-	9,234	10,231	11,401	11,604

Table 34: Horsham Town Centre Convenience Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Convenience Goods Turnover in Horsham Town Centre (£000)	97,100	106,238	114,011	122,850	124,478
Total Existing Convenience Goods Floorspace (sqm net)	6,777	6,777	6,777	6,777	6,777
Sales per sqm net (£)	14,328	10,129	10,385	10,647	10,700
Sales from Existing Floorspace (£000)	97,100	68,645	70,378	72,155	72,516
Residual Spending to Support New Shops (£000)	-	37,594	43,633	50,695	51,962
Sales per sqm net in new shops (£) Based on Large Store Format	10,000	10,202	10,459	10,723	10,777
Capacity for new Convenience Floorspace (sqm net)	-	3,685	4,172	4,728	4,822

Table 35: Billingshurst Village Centre Convenience Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Convenience Goods Turnover in Billingshurst Town Centre (£000)	5,067	5,543	5,951	6,438	6,535
Total Existing Convenience Goods Floorspace (sqm net)	567	567	567	567	567
Sales per sqm net (£)	8,936	6,953	7,129	7,309	7,345
Sales from Existing Floorspace (£000)	5,067	3,942	4,042	4,144	4,165
Residual Spending to Support New Shops (£000)	-	1,600	1,910	2,294	2,370
Sales per sqm net in new shops (£) Based on Large Store Format	10,000	10,202	10,459	10,723	10,777
Capacity for new Convenience Floorspace (sqm net)	-	157	183	214	220

Table 36: Billingshurst Village Centre Convenience Goods Capacity Projections: Assuming Discount Operator

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Convenience Goods Turnover in Billingshurst Town Centre (£000)	5,067	5,543	5,951	6,438	6,535
Total Existing Convenience Goods Floorspace (sqm net)	567	567	567	567	567
Sales per sqm net (£)	8,936	6,953	7,129	7,309	7,345
Sales from Existing Floorspace (£000)	5,067	3,942	4,042	4,144	4,165
Residual Spending to Support New Shops (£000)	-	1,600	1,910	2,294	2,370
Sales per sqm net in new shops (£) Based on Large Store Format	4,000	4,081	4,184	4,289	4,311
Capacity for new Convenience Floorspace (sqm net)	-	392	456	535	550

Table 37: Southwater Town Centre Convenience Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Convenience Goods Turnover in Southwater Town Centre (£000)	4,058	4,478	4,857	5,282	5,363
Total Existing Convenience Goods Floorspace (sqm net)	515	515	515	515	515
Sales per sqm net (£)	7,880	6,953	7,129	7,309	7,345
Sales from Existing Floorspace (£000)	4,058	3,581	3,671	3,764	3,783
Residual Spending to Support New Shops (£000)	-	898	1,186	1,518	1,580
Sales per sqm net in new shops (£) Based on Large Store Format	10,000	10,202	10,459	10,723	10,777
Capacity for new Convenience Floorspace (sqm net)	-	88	113	142	147

Table 38: Southwater Town Centre Convenience Goods Capacity Projections: Assuming Discount Operator

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2026 - 0.5% per annum				
	2010	2015	2020	2025	2026
Total Convenience Goods Turnover in Southwater Town Centre (£000)	4,058	4,478	4,857	5,282	5,363
Total Existing Convenience Goods Floorspace (sqm net)	515	515	515	515	515
Sales per sqm net (£)	7,880	6,953	7,129	7,309	7,345
Sales from Existing Floorspace (£000)	4,058	3,581	3,671	3,764	3,783
Residual Spending to Support New Shops (£000)	-	898	1,186	1,518	1,580
Sales per sqm net in new shops (£) Based on Large Store Format	4,000	4,081	4,184	4,289	4,311
Capacity for new Convenience Floorspace (sqm net)	-	220	283	354	366

APPENDIX 4

COMPARISON GOODS CAPACITY PROJECTIONS

HORSHAM RETAIL NEEDS STUDY 2010

Table 1: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	41,116	19,706	29,266	96,211	5,416	8,736	14,480	32,748	11,933	6,206	17,788	13,360	12,110	19,305	**328,381**
2015	42,376	20,037	31,321	99,392	5,681	9,191	15,389	34,418	12,350	6,520	18,095	13,584	12,443	20,069	**340,866**
2020	43,764	20,417	33,190	102,879	5,953	9,671	16,373	36,280	12,774	6,816	18,527	13,903	12,750	20,779	**354,076**
2025	45,374	20,988	35,212	106,458	6,190	10,260	17,425	38,271	13,330	7,148	19,160	14,358	13,090	21,500	**368,764**
2026	45,793	21,129	35,563	107,241	6,245	10,378	17,624	38,629	13,433	7,214	19,301	14,442	13,152	21,667	**371,811**

Source: Experian Business Solutions, March 2010

Table 1A: Population Growth Rates

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010-2015 (%)	3.1	1.7	7.0	3.3	4.9	5.2	6.3	5.1	3.5	5.1	1.7	1.7	2.7	4.0	3.8
2010-2020 (%)	6.4	3.6	13.4	6.9	9.9	10.7	13.1	10.8	7.0	9.8	4.2	4.1	5.3	7.6	7.8
2010-2025 (%)	10.4	6.5	20.3	10.7	14.3	17.4	20.3	16.9	11.7	15.2	7.7	7.5	8.1	11.4	12.3
2010-2026 (%)	11.4	7.2	21.5	11.5	15.3	18.8	21.7	18.0	12.6	16.2	8.5	8.1	8.6	12.2	13.2

Source: Experian Business Solutions, March 2010

Table 1B: Survey Area Postcodes

ZONE	POSTCODES
1	GU5 9, RH2 8, RH3 7, RH4 1/2/3, RH5 4/6,
2	GU6 7/8, RH5 5
3	RH12 3/4/5
4	RH6 0/7/8, RH10 1/5/6/8/9, RH11 0/6/7/8/9
5	RH14 0
6	RH14 9
7	RH13 0/9
8	RH12 1/2, RH13 5/6
9	RH17 5/6
10	RH13 8
11	BN5 9, BN44 3
12	RH20 3/4
13	RH20 1/2
14	BN13 3, BN14 0, BN18 9

Table 2: Comparison Goods Retail Expenditure Forecasts Per Capita (2008 Prices)

Growth in Per Capita Expenditure:
2008 - 2009 1.1% pa
2009 - 2010 -0.1% pa
2010 - 2015 2.3% pa
2015 - 2026 4.7% pa

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2008	3,388	3,418	3,363	2,793	3,642	3,218	3,257	3,329	3,300	3,510	3,384	3,311	3,598	3,235
2008 (Minus SFT at 7.5%)	3,134	3,162	3,111	2,584	3,369	2,977	3,013	3,079	3,053	3,247	3,130	3,063	3,328	2,992
2009	3,425	3,456	3,400	2,824	3,682	3,253	3,293	3,366	3,336	3,549	3,421	3,347	3,638	3,271
2009 (Minus SFT at 8.5%)	3,134	3,162	3,111	2,584	3,369	2,977	3,013	3,080	3,053	3,247	3,130	3,063	3,328	2,993
2010	3,422	3,452	3,397	2,821	3,678	3,250	3,290	3,362	3,333	3,545	3,418	3,344	3,634	3,267
2010 (Minus SFT at 9.1%)	3,110	3,138	3,088	2,564	3,344	2,954	2,990	3,056	3,030	3,222	3,107	3,040	3,303	2,970
2015	3,834	3,868	3,806	3,161	4,121	3,642	3,686	3,767	3,734	3,972	3,829	3,747	4,072	3,661
2015 (Minus SFT at 11.4%)	3,397	3,427	3,372	2,800	3,651	3,226	3,265	3,338	3,309	3,519	3,393	3,320	3,607	3,243
2020	4,824	4,866	4,788	3,976	5,185	4,582	4,637	4,740	4,698	4,997	4,818	4,714	5,123	4,606
2020 (Minus SFT at 11.5%)	4,269	4,307	4,237	3,519	4,589	4,055	4,104	4,195	4,158	4,423	4,264	4,172	4,533	4,076
2025	6,069	6,123	6,024	5,003	6,524	5,764	5,834	5,963	5,911	6,287	6,062	5,931	6,445	5,795
2025 (Minus SFT at 11.5%)	5,371	5,418	5,331	4,428	5,774	5,101	5,163	5,277	5,231	5,564	5,365	5,249	5,704	5,128
2026	6,354	6,410	6,307	5,238	6,830	6,035	6,108	6,243	6,189	6,583	6,347	6,210	6,748	6,067
2026 (Minus SFT at 11.5%)	5,623	5,673	5,582	4,636	6,045	5,341	5,406	5,525	5,477	5,826	5,617	5,496	5,972	5,369

Source: Experian Business Solutions, March 2010

Table 3: Total Survey Area Comparison Goods Retail Expenditure (2008 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	127,889	61,837	90,359	246,704	18,109	25,809	43,298	100,087	36,153	19,999	55,263	40,611	40,002	57,336	963,458
2015	143,943	68,665	105,607	278,324	20,744	29,654	50,252	114,876	40,861	22,945	61,393	45,094	44,886	65,092	1,092,335
2020	186,824	87,930	140,639	362,051	27,318	39,213	67,192	152,178	53,114	30,145	78,996	58,001	57,802	84,697	1,426,100
2025	243,700	113,723	187,725	471,362	35,738	52,341	89,970	201,971	69,735	39,774	102,785	75,363	74,663	110,260	1,869,108
2026	257,510	119,868	198,507	497,145	37,751	55,431	95,274	213,441	73,576	42,028	108,408	79,367	78,542	116,339	1,973,187

Source: Tables 1 and 2

Table 4: Horsham Town Centre: Comparison Goods Allocation - % Market Share

Horsham Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	6%	26%	61%	2%	29%	56%	60%	62%	11%	51%	10%	22%	20%	2%
2015	6%	26%	61%	2%	29%	56%	60%	62%	11%	51%	10%	22%	20%	2%
2020	6%	26%	61%	2%	29%	56%	60%	62%	11%	51%	10%	22%	20%	2%
2025	6%	26%	61%	2%	29%	56%	60%	62%	11%	51%	10%	22%	20%	2%
2026	6%	26%	61%	2%	29%	56%	60%	62%	11%	51%	10%	22%	20%	2%

Source: Horsham Household Telephone Survey, February 2010

Table 5: Horsham Town Centre: Comparison Goods Allocation - Spend (£000) 2008 Prices

Horsham Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	7,648	16,274	55,198	4,892	5,283	14,332	26,154	62,116	3,814	10,184	5,677	8,765	8,083	947	229,369
2015	8,608	18,071	64,512	5,518	6,051	16,467	30,355	71,294	4,311	11,685	6,307	9,733	9,070	1,076	263,058
2020	11,172	23,141	85,912	7,179	7,969	21,775	40,588	94,445	5,604	15,351	8,115	12,519	11,680	1,400	346,850
2025	14,574	29,929	114,676	9,346	10,425	29,065	54,347	125,347	7,358	20,255	10,559	16,266	15,087	1,822	459,055
2026	15,400	31,547	121,262	9,857	11,012	30,781	57,551	132,466	7,763	21,403	11,137	17,130	15,871	1,923	485,102

Source: Tables 3 and 4

Table 6: Bililngshurst Village Centre: Comparison Goods Allocation - % Market Share

Billingshurst Village Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	4%	11%	0%	0%	0%	0%	0%	0%	0%	0%
2015	0%	0%	0%	0%	4%	11%	0%	0%	0%	0%	0%	0%	0%	0%
2020	0%	0%	0%	0%	4%	11%	0%	0%	0%	0%	0%	0%	0%	0%
2025	0%	0%	0%	0%	4%	11%	0%	0%	0%	0%	0%	0%	0%	0%
2026	0%	0%	0%	0%	4%	11%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 7: Bililngshurst Village Centre: Comparison Goods Allocation - Spend (£000) 2008 Prices

Billingshurst Village Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	695	2,810	122	-	-	-	-	-	45	-	3,673
2015	-	-	-	-	796	3,229	142	-	-	-	-	-	51	-	4,217
2020	-	-	-	-	1,048	4,270	190	-	-	-	-	-	65	-	5,573
2025	-	-	-	-	1,371	5,699	254	-	-	-	-	-	84	-	7,409
2026	-	-	-	-	1,449	6,035	269	-	-	-	-	-	89	-	7,842

Source: Tables 3 and 6

Table 8: Southwater Village Centre: Comparison Goods Allocation - % Market Share

Southwater Village Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 9: Southwater Village Centre: Comparison Goods Allocation - Spend (£000) 2008 Prices

Southwater Village Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	-	-	124	-	-	48	-	-	-	-	172
2015	-	-	-	-	-	-	144	-	-	55	-	-	-	-	199
2020	-	-	-	-	-	-	193	-	-	72	-	-	-	-	265
2025	-	-	-	-	-	-	258	-	-	95	-	-	-	-	354
2026	-	-	-	-	-	-	274	-	-	101	-	-	-	-	374

Source: Tables 3 and 8

Table 10: Tan Bridge Retail Park: Comparison Goods Allocation - % Market Share

Tan Bridge Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	6%	0%	3%	1%	1%	4%	0%	9%	1%	1%	0%	0%
2015	0%	0%	6%	0%	3%	1%	1%	4%	0%	9%	1%	1%	0%	0%
2020	0%	0%	6%	0%	3%	1%	1%	4%	0%	9%	1%	1%	0%	0%
2025	0%	0%	6%	0%	3%	1%	1%	4%	0%	9%	1%	1%	0%	0%
2026	0%	0%	6%	0%	3%	1%	1%	4%	0%	9%	1%	1%	0%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 11: Tan Bridge Retail Park: Comparison Goods Allocation - Spend (£000) 2008 Prices

Tan Bridge Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	289	5,124	-	485	135	439	3,972	102	1,740	325	587	-	-	13,197
2015	-	320	5,989	-	555	155	509	4,558	115	1,996	361	652	-	-	15,212
2020	-	410	7,976	-	731	205	681	6,039	150	2,623	464	838	-	-	20,117
2025	-	531	10,646	-	957	273	912	8,015	197	3,461	604	1,089	-	-	26,684
2026	-	559	11,258	-	1,011	289	966	8,470	208	3,657	637	1,147	-	-	28,201

Source: Tables 3 and 8

Table 12: Broadbridge Heath Retail Park: Comparison Goods Allocation - % Market Share

Broadbridge Heath Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	3%	7%	0%	5%	5%	8%	7%	0%	10%	1%	3%	5%	0%
2015	0%	3%	7%	0%	5%	5%	8%	7%	0%	10%	1%	3%	5%	0%
2020	0%	3%	7%	0%	5%	5%	8%	7%	0%	10%	1%	3%	5%	0%
2025	0%	3%	7%	0%	5%	5%	8%	7%	0%	10%	1%	3%	5%	0%
2026	0%	3%	7%	0%	5%	5%	8%	7%	0%	10%	1%	3%	5%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 13: Broadbridge Heath Retail Park: Comparison Goods Allocation - Spend (£000) 2008 Prices

Broadbridge Heath Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	434	1,886	6,305	-	955	1,342	3,320	7,267	-	2,081	674	1,075	2,130	-	27,468
2015	489	2,094	7,369	-	1,094	1,542	3,854	8,341	-	2,387	748	1,194	2,390	-	31,501
2020	634	2,682	9,814	-	1,440	2,039	5,153	11,049	-	3,136	963	1,536	3,078	-	41,523
2025	827	3,468	13,100	-	1,884	2,721	6,900	14,665	-	4,138	1,253	1,995	3,975	-	54,925
2026	874	3,656	13,852	-	1,990	2,882	7,306	15,498	-	4,372	1,321	2,101	4,182	-	58,034

Source: Tables 3 and 12

Table 14: Foundry Retail Park: Comparison Goods Allocation - % Market Share

Foundry Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
2015	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
2020	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
2025	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
2026	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%

Source: Horsham Household Telephone Survey, February 2010

Table 15: Foundry Retail Park: Comparison Goods Allocation - Spend (£000) 2008 Prices

Foundry Retail Park	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	TOTAL
2010	-	-	-	-	51	-	-	113	-	-	-	-	444	-	609
2015	-	-	-	-	59	-	-	130	-	-	-	-	499	-	687
2020	-	-	-	-	77	-	-	172	-	-	-	-	642	-	892
2025	-	-	-	-	101	-	-	229	-	-	-	-	830	-	1,159
2026	-	-	-	-	107	-	-	241	-	-	-	-	873	-	1,221

Source: Tables 3 and 14

Table 16: Horsham Existing Comparison Goods Floorspace 2010

	Net Floorspace (sqm)
Horsham Town Centre	24,920
Billingshurst Village Centre	1,171
Southwater Village Centre	258
Tan Bridge Retail Park	
Staples	722
Currys	663
Sub Total	1,385
Broadbridge Heath Retail Park	
Homebase	2,864
Carpetright	734
Halfords	952
Vacant	0
Sub Total	4,550
Foundry Retail Park	
Dreams	5,223
Vacant	0
Sub Total	5,223
TOTAL	**37,507**

Source: Experian Goad, Trevor Woods Database, Horsham District Council

Table 17: Horsham District Global Comparison Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2026 - 2% per annum				
	2010	2015	2020	2025	2026
Total Available Expenditure (£000)	963,458	1,092,335	1,426,100	1,869,108	1,973,187
Market Share from Survey Area	28	29	29	29	29
Survey Area Residents Spending (£000)	274,488	314,875	415,219	549,586	580,774
Existing Retail Floorspace (sqm net)	37,507	37,507	37,507	37,507	37,507
Sales (£ per sqm net)	7,318	7,884	8,705	9,611	9,803
Sales from Existing Floorspace (£000)	274,488	295,701	326,478	360,458	367,667
Residual Expenditure to support new floorspace (£000)	-	19,174	88,741	189,128	213,107
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367
Capacity for new floorspace (sqm net)	**-**	**3,236**	**13,565**	**26,186**	**28,927**

Table 18: Horsham Town Centre Comparison Goods Capacity Projections

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2026 - 2% per annum				
	2010	2015	2020	2025	2026
Total Available Expenditure (£000)	963,458	1,092,335	1,426,100	1,869,108	1,973,187
Market Share from Survey Area	24	24	24	25	25
Survey Area Residents Spending (£000)	229,369	263,058	346,850	459,055	485,102
Existing Retail Floorspace (sqm net)	24,920	24,920	24,920	24,920	24,920
Sales (£ per sqm net)	9,204	9,915	10,947	12,087	12,329
Sales from Existing Floorspace (£000)	229,369	247,095	272,813	301,208	307,232
Residual Expenditure to support new floorspace (£000)	-	15,963	74,037	157,848	177,870
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367
Capacity for new floorspace (sqm net)	**-**	**2,694**	**11,318**	**21,855**	**24,144**

APPENDIX 5

HOUSEHOLD TELEPHONE SURVEY RESULTS

Q01 In which shop or shopping centre do you do most of your household's main food shopping?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' and '(Don't do)' at Q01)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Tesco Extra, Horsham Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	14.5%	133	3.3%	3	30.2%	16	52.4%	41	1.4%	4	26.9%	4	29.2%	7	58.8%	25
Sainsbury, 7 Worthing Road, Horsham, RH12 1SQ	12.3%	113	1.6%	2	15.9%	8	30.2%	24	0.0%	0	6.0%	1	1.5%	0	26.5%	11
Tesco Extra, Gatwick Extra, Reigate Road, Hookwood, Horley, RH6 0AT	8.9%	82	16.4%	17	1.6%	1	1.6%	1	22.2%	63	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Crawley Avenue, West Green, Crawley, RH10 2NF	7.8%	72	0.0%	0	0.0%	0	1.6%	1	23.6%	66	1.5%	0	1.5%	0	0.0%	0
Tesco Extra, Crawley Hazelwick Extra, Hazelwick Avenue, Crawley, RH10 1GY	7.5%	69	1.6%	2	0.0%	0	0.0%	0	23.6%	66	0.0%	0	0.0%	0	0.0%	0
Asda, Pegler Way, Crawley, RH11 7AH	5.7%	52	0.0%	0	0.0%	0	4.8%	4	16.7%	47	4.5%	1	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham, RH12 1EH	3.1%	29	1.6%	2	1.6%	1	6.3%	5	0.0%	0	3.0%	0	0.0%	0	0.0%	0
Tesco, 18 London Road, Pulborough, RH20 1AS	2.9%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	7.7%	2	1.5%	1
Sainsbury, 32-38 High Street, Dorking, RH4 1AY	2.6%	23	19.7%	21	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Local Shops	2.3%	21	19.7%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Shoreham EXTRA, Holmbush Farm, Upper Shoreham Road, Shoreham by Sea, BN43 6TD	2.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Stane Street, Codmore Hill, Pulborough, RH10 1BQ	2.2%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.9%	3	21.5%	5	0.0%	0
Sainsbury, Bannister Way, Haywards Heath	1.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Downlands Business Park, Lyons Farm, Worthing, BN14 9LA	1.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Waitrose, 48-52 South Street, Dorking, RH4 2HQ	1.7%	16	14.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 26 Victoria Road, Horley, RH6 7PZ	1.7%	16	0.0%	0	0.0%	0	0.0%	0	5.6%	16	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 182 Littlehampton Road, Durrington. Worthing, BN13 1QY	1.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Stocklund Square, 146-158 High Street, Cranleigh, GU6 8RF	1.4%	13	0.0%	0	23.8%	13	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0
Other	1.1%	10	6.6%	7	0.0%	0	1.6%	1	0.0%	0	3.0%	0	0.0%	0	0.0%	0
Sainsbury's Central, 37-43 Queensway, Crawley, RH10 1EG	1.0%	10	1.6%	2	0.0%	0	0.0%	0	2.8%	8	0.0%	0	0.0%	0	0.0%	0
Henfield Local Shops	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 5 Peterhouse Parade, Pound Hill, Crawley, RH10 3BA	0.9%	8	0.0%	0	0.0%	0	0.0%	0	2.8%	8	0.0%	0	0.0%	0	0.0%	0
Tesco, New Road, West Durrington, Worthing, BN13 3PB	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Burgess Hill	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Worthing, BN11 1LL	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Clay Lane, Burpham, Guildford, GU4 7JU	0.6%	5	3.3%	3	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Market Town, Village Way, Cranleigh, GU6 8AF	0.5%	5	0.0%	0	7.9%	4	0.0%	0	0.0%	0	1.5%	0	1.5%	0	0.0%	0
Tesco Express, Pulborough	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	12.3%	3	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Road, Storrington, Pulborough, RH20 4HG																
Marks & Spencer, Unit 19/20, Swan Walk, Horsham, RH12 1YX	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Somerfield, 12-13 Old Mill Lane, Storrington, Pulborough, RH20 4NQ	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Local Shops	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	4	0.0%	0	0.0%	0	0.0%	0
Waitrose, Via Ravenna, Chichester	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, High Street, Billingshurst, RH14 9NY	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	12.3%	3	0.0%	0
Marks & Spencer, 21 St. Martins Walk, Dorking, RH4 1UX	0.4%	3	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, New Road, Rustington	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Redkiln Way, Horsham, RH13 5QH	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	1.5%	1
Sainsbury, Old Shoreham Road, Hove	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Local Shops	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Westhampnett Road, Chichester	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Sainsbury, Woolsack Way, Godalming	0.3%	3	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer Simply Food, 94 High Street, Cranleigh, GU6 8AJ	0.3%	3	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, 1 Crowhurst Road, Hollingbury, Brighton, BN1 8AS	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Tesco Express, 84-86 Downland Drive, Crawley, RH11 8SW	0.2%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea, BN43 6TD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Southwater Village, Shopping Centre, Southwater, RH13 9LA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2
Sainsbury, 19-27 High Street, Littlehampton, BN17 5EG	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Ham Road, Shoreham-by-Sea, BN43 6PA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bridge Street, Godalming	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0
Somerfield, Supermarket Unit Dorsten Square, Bewbush, Crawley, RH11 8XW	0.1%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashington Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, 34 North Street, Worthing, BN11 1DU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 51-59 Montague Street, Worthing, BN11 3BW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s Local, 100 Brighton Road, Horley, RH6 7JU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Broadpiece, Littlehampton, BN17 5RA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 176-180 Findon Road, Worthing,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
BN14 0EL																
Somerfield, 1 Broadmark Lane, Rustington, Littlehampton, BN16 2NE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beare Green Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Welcome, High Street, Partridge Green, Horsham, RH13 8HR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Cowfold Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Tesco Express, 2-2A Broadwater Street, Worthing, BN14 9DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.8%	25	3.3%	3	0.0%	0	0.0%	0	0.0%	0	10.4%	2	7.7%	2	5.9%	2
Weighted base:		918		106		53		79		281		16		24		42
Sample:		909		61		63		63		72		67		65		68

Q02 How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' or '(Don't know / varies)' at Q01)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car / Van (as driver)	74.5%	665	76.3%	78	74.6%	40	77.8%	62	73.6%	207	93.3%	13	63.3%	14	84.4%	34
Car / van (as passenger)	11.4%	101	15.3%	16	15.9%	8	15.9%	13	9.7%	27	6.7%	1	25.0%	6	10.9%	4
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	2.7%	24	1.7%	2	0.0%	0	3.2%	3	2.8%	8	0.0%	0	1.7%	0	1.6%	1
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Walk	8.7%	78	6.8%	7	6.3%	3	0.0%	0	8.3%	23	0.0%	0	8.3%	2	3.1%	1
Bicycle	0.9%	8	0.0%	0	3.2%	2	3.2%	3	1.4%	4	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.4%	4	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.1%	10	0.0%	0	0.0%	0	0.0%	0	2.8%	8	0.0%	0	0.0%	0	0.0%	0
Weighted base:		892		103		53		79		281		14		22		40
Sample:		870		59		63		63		72		60		60		64

Q03 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' or '(Don't know / varies)' at Q01)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Yes - Meeting Friends	1.0%	9	1.7%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	0	1.7%	0	1.6%	1
Yes - Meeting Family	0.6%	6	0.0%	0	1.6%	1	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0
Yes - Other non-food shops	26.5%	236	33.9%	35	46.0%	25	31.7%	25	18.1%	51	28.3%	4	16.7%	4	20.3%	8
Yes - Bars / Pubs	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Yes - Restaurants	0.9%	8	0.0%	0	0.0%	0	1.6%	1	1.4%	4	1.7%	0	0.0%	0	0.0%	0
Yes - Cafes	4.7%	42	1.7%	2	6.3%	3	0.0%	0	5.6%	16	5.0%	1	6.7%	1	6.3%	2
Yes - Cinemas	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Ten Pin Bowling	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Gym / Health and Fitness	1.3%	11	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	0	3.1%	1
Yes - Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Swimming	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Markets	0.9%	8	0.0%	0	4.8%	3	1.6%	1	1.4%	4	0.0%	0	0.0%	0	0.0%	0
Yes - Theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Museums / Art Gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Library	1.3%	11	1.7%	2	0.0%	0	3.2%	3	0.0%	0	1.7%	0	1.7%	0	1.6%	1
Yes - Financial Service (Banks, Building Society)	9.4%	84	15.3%	16	25.4%	14	6.3%	5	5.6%	16	11.7%	2	5.0%	1	10.9%	4
Yes - Personal Service (Hairdressers, Beauty Salon)	1.4%	12	0.0%	0	1.6%	1	1.6%	1	0.0%	0	1.7%	0	1.7%	0	0.0%	0
Yes - Other Service (Travel Agent, Estate Agent)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.4%	4	0.0%	0	0.0%	0	0.0%	0
Yes - Other	0.5%	4	1.7%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Yes - Other food shops	0.7%	6	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	3.3%	1	0.0%	0
Yes - petrol station	1.7%	15	0.0%	0	0.0%	0	1.6%	1	2.8%	8	0.0%	0	1.7%	0	3.1%	1
Yes - church	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - school run	0.4%	4	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Yes - work	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Yes - recycling	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
No	58.9%	525	57.6%	59	36.5%	20	65.1%	51	66.7%	188	55.0%	8	71.7%	16	56.2%	22
(Don't know / varies)	2.4%	21	1.7%	2	0.0%	0	0.0%	0	2.8%	8	1.7%	0	0.0%	0	1.6%	1
Weighted base:		892		103		53		79		281		14		22		40
Sample:		870		59		63		63		72		60		60		64

Q04 Where do you do most of your household's small scale 'top-up' food shopping? (i.e. to buy bread, milk, etc, on a day-to-day basis)
Those who do small scale 'top-up' food shopping at Q04 (Excluding those who said 'Internet / delivered' and '(Don't do)' at Q04)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Sainsbury, 7 Worthing Road, Horsham, RH12 1SQ	5.4%	44	0.0%	0	3.6%	2	20.7%	15	0.0%	0	1.8%	0	1.5%	0	5.4%	2
Crawley Local Shops	4.8%	39	0.0%	0	0.0%	0	0.0%	0	17.2%	39	0.0%	0	0.0%	0	0.0%	0
Horsham Local Shops	3.2%	26	0.0%	0	0.0%	0	24.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 48-52 South Street, Dorking, RH4 2HQ	3.1%	25	23.7%	24	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pegler Way, Crawley, RH11 7AH	3.0%	25	0.0%	0	0.0%	0	1.7%	1	10.3%	23	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crawley Hazelwick Extra, Hazelwick Avenue, Crawley, RH10 1GY	2.9%	23	0.0%	0	0.0%	0	0.0%	0	10.3%	23	0.0%	0	0.0%	0	0.0%	0
Reigate Local Shops	2.8%	23	22.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	2.6%	21	1.7%	2	1.8%	1	6.9%	5	3.4%	8	0.0%	0	0.0%	0	16.1%	6
Sainsbury, 32-38 High Street, Dorking, RH4 1AY	2.6%	21	20.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham, RH12 1EH	2.5%	20	0.0%	0	1.8%	1	6.9%	5	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Henfield Local Shops	2.3%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Other	2.3%	19	6.8%	7	1.8%	1	1.7%	1	1.7%	4	3.5%	0	0.0%	0	1.8%	1
Budgens, High Street, Billingshurst, RH14 9NY	2.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	2	59.7%	15	1.8%	1
Tesco Express, Redkiln Way, Horsham, RH13 5QH	2.1%	17	0.0%	0	0.0%	0	12.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Southwater Village, Shopping Centre, Southwater, RH13 9LA	2.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.9%	15
Tesco Extra, Gatwick Extra, Reigate Road, Hookwood, Horley, RH6 0AT	1.9%	16	0.0%	0	0.0%	0	0.0%	0	6.9%	16	0.0%	0	0.0%	0	0.0%	0
Waitrose, 26 Victoria Road, Horley, RH6 7PZ	1.9%	16	0.0%	0	0.0%	0	0.0%	0	6.9%	16	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Crawley Avenue, West Green, Crawley, RH10 2NF	1.9%	15	0.0%	0	0.0%	0	1.7%	1	5.2%	12	0.0%	0	0.0%	0	0.0%	0
Steyning Local Shops	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Unit 19/20, Swan Walk, Horsham, RH12 1YX	1.8%	14	0.0%	0	1.8%	1	3.4%	3	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Storrington Local Shops	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 5 Peterhouse Parade, Pound Hill, Crawley, RH10 3BA	1.5%	12	0.0%	0	0.0%	0	0.0%	0	5.2%	12	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 73 Brighton Road, Horley, RH6 7HL	1.4%	12	0.0%	0	0.0%	0	0.0%	0	5.2%	12	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s Central, 37-43 Queensway, Crawley, RH10 1EG	1.4%	12	0.0%	0	0.0%	0	0.0%	0	5.2%	12	0.0%	0	0.0%	0	0.0%	0
Tesco, 18 London Road, Pulborough, RH20 1AS	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Sainsbury, Stocklund Square, 146-158 High Street, Cranleigh, GU6 8RF	1.3%	11	0.0%	0	20.0%	9	0.0%	0	0.0%	0	10.5%	1	0.0%	0	0.0%	0
Cranleigh Local Shops	1.2%	10	0.0%	0	21.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Local Shops	1.2%	10	8.5%	9	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Supermarket Unit Dorsten Square, Bewbush, Crawley, RH11 8XW	1.1%	9	0.0%	0	0.0%	0	1.7%	1	3.4%	8	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 176-180 Findon Road, Worthing, BN14 0EL	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Market Town, Village Way, Cranleigh, GU6 8AF	1.0%	8	0.0%	0	16.4%	8	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Cowfold Local Shops	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Iceland, 50-58 Victoria	1.0%	8	0.0%	0	0.0%	0	0.0%	0	3.4%	8	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Road, Horley, RH6 7PZ																
Marks & Spencer, 21 St. Martins Walk, Dorking, RH4 1UX	1.0%	8	6.8%	7	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Pulborough Road, Storrington, Pulborough, RH20 4HG	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0	6.0%	1	0.0%	0
Pulborough Local Shops	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, 3-6 Martletts Corner, Church Street, Rudgwick, Horsham, RH12 3EX	0.8%	7	0.0%	0	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Bannister Way, Haywards Heath	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashington Local Shops	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Stane Street, Codmore Hill, Pulborough, RH10 1BQ	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	1	1.5%	0	0.0%	0
Findon Local Shops	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ifold Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.7%	4	5.3%	1	0.0%	0	1.8%	1
Welcome, 2-4 Fitzalan Road, Roffey, Horsham, RH13 6AA	0.6%	5	0.0%	0	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 182 Littlehampton Road, Durrington. Worthing, BN13 1QY	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southwater Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	4
Durrington Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beare Green Local Shops	0.5%	4	1.7%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	7.1%	2
One Stop, 12-14 Station Road, Horsham, RH13 5EY	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Downlands Business Park, Lyons Farm, Worthing, BN14 9LA	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Local Shops	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amberley	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Local Shops	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.9%	3	0.0%	0
Iceland, 3 Broadfield Barton, Broadfield, Crawley, RH11 9BA	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	4	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 23 Queensway, Crawley, RH10 1EE	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	4	0.0%	0	0.0%	0	0.0%	0
Iceland, 35 High Street, Crawley, RH10 1BQ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	4	0.0%	0	0.0%	0	0.0%	0
Welcome, High Street, Partridge Green, Horsham, RH13 8HR	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmwood Local Shops	0.4%	3	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capel Local Shops	0.4%	3	0.0%	0	7.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, 12-13 Old Mill Lane, Storrington, Pulborough, RH20 4NQ	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Balcombe Local Shops	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer Simply Food, 94 High Street, Cranleigh, GU6 8AJ	0.3%	3	0.0%	0	5.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, New Road, West Durrington, Worthing, BN13 3PB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 2-4 Lower Station Road, Billingshurst, RH14 9SX	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	9.0%	2	0.0%	0
Broadbridge Heath Local Shops	0.2%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Wisborough Green Local	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	2	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Shops																
Westcott Local Shops	0.2%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ewhurst Local Shops	0.2%	2	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Superstore, Newland Street, Broadwater Bridge, Worthing, BN11 1JU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arundel Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, 34 North Street, Worthing, BN11 1DU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loxwood Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	2	0.0%	0	0.0%	0
West Chiltington Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ardingly Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Local Shops	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Tesco Extra, Shoreham EXTRA, Holmbush Farm, Upper Shoreham Road, Shoreham by Sea, BN43 6TD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Partridge Green Local Shops	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, 84-86 Lambs Farm Road, Greenfields Estate, Horsham, RH12 4JH	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome, 24 North Parade, Warnham Road, Horsham, RH12 2DH	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plaistow Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	0.0%	0
Waitrose, High Street, Worthing, BN11 1LL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockley Local Shops	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rectory Road, Salvington, Worthing, BN14 7PE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, New Road, Rustington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Burgess Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Brighton Marina Village, Brighton, BN2 5UT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Ham Road, Shoreham-by-Sea, BN43 6PA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Old Shoreham Road, Hove	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 7 Sterling Parade, The Street, Rustington, Littlehampton, BN16 3PA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 84-86 Downland Drive, Crawley, RH11 8SW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, 1 Crowhurst Road, Hollingbury, Brighton, BN1 8AS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea, BN43 6TD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Buck Barn Garage, Horsham, RH13 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alfold Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.0%	65	3.4%	3	7.3%	3	3.4%	3	8.6%	20	10.5%	1	3.0%	1	3.6%	1
Weighted base:		817		103		47		73		227		13		25		35
Sample:		833		59		55		58		58		57		67		56

Q05 In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods?
Those who go shopping for clothing and footwear at Q05 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q05)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Crawley Town Centre	32.3%	294	21.2%	24	4.8%	3	13.6%	11	79.4%	211	7.8%	1	6.2%	1	14.3%	6
Horsham Town Centre	28.2%	258	16.7%	19	37.1%	20	75.8%	63	4.4%	12	37.5%	6	64.1%	15	61.9%	24
Guildford City Centre	8.3%	76	27.3%	31	48.4%	25	1.5%	1	0.0%	0	39.1%	6	12.5%	3	4.8%	2
Worthing Town Centre	7.3%	66	0.0%	0	0.0%	0	1.5%	1	0.0%	0	1.6%	0	0.0%	0	4.8%	2
Brighton City Centre	3.9%	35	0.0%	0	0.0%	0	0.0%	0	2.9%	8	0.0%	0	0.0%	0	4.8%	2
Chichester Town Centre	3.2%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	1	3.1%	1	1.6%	1
Central London	2.4%	22	1.5%	2	0.0%	0	0.0%	0	2.9%	8	1.6%	0	4.7%	1	0.0%	0
Reigate Town Centre	1.1%	10	9.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.1%	10	6.1%	7	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	1.0%	10	7.6%	9	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Horley Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	2.9%	8	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.8%	7	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1
Dorking Town Centre	0.7%	6	4.5%	5	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	0.6%	6	0.0%	0	0.0%	0	1.5%	1	1.5%	4	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croydon Town Centre	0.4%	4	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Portsmouth City Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	4	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	1.6%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	4.0%	36	3.0%	3	1.6%	1	3.0%	3	4.4%	12	1.6%	0	6.2%	1	3.2%	1
Weighted base:		912		115		53		83		266		15		24		39
Sample:		909		66		62		66		68		64		64		63

Q06 How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)?
Those who go shopping for clothing and footwear at Q05 (Excluding '(Don't know / varies / no pattern)' at Q05)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car / Van (as driver)	61.2%	577	64.7%	77	62.7%	36	66.2%	57	53.5%	148	77.9%	12	58.5%	14	73.1%	30
Car / van (as passenger)	7.9%	75	13.2%	16	13.4%	8	5.9%	5	7.0%	20	4.4%	1	12.3%	3	11.9%	5
Motorcycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	10.5%	99	2.9%	3	11.9%	7	11.8%	10	14.1%	39	2.9%	0	15.4%	4	4.5%	2
Train	3.4%	32	7.4%	9	0.0%	0	2.9%	3	2.8%	8	1.5%	0	4.6%	1	0.0%	0
Taxi	0.2%	2	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Walk	6.3%	60	2.9%	3	1.5%	1	2.9%	3	7.0%	20	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.8%	8	0.0%	0	0.0%	0	2.9%	3	1.4%	4	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Mobility scooter	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	4	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	19	2.9%	3	1.5%	1	0.0%	0	4.2%	12	4.4%	1	0.0%	0	1.5%	1
(Don't travel / goods delivered)	6.9%	65	5.9%	7	7.5%	4	5.9%	5	8.5%	23	7.4%	1	7.7%	2	9.0%	4
Weighted base:		943		118		57		85		277		16		24		42
Sample:		944		68		67		68		71		68		65		67

Column %ges.

Q07 Where else do you shop for your household's clothing, footwear and other fashion goods?
Those who go shopping for clothing and footwear at Q05 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Nowhere else)' at Q07)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Crawley Town Centre	24.6%	161	23.2%	23	20.0%	7	43.4%	29	27.5%	43	10.0%	1	23.5%	4	32.7%	11
Horsham Town Centre	17.8%	116	8.9%	9	15.0%	5	13.2%	9	25.0%	39	32.5%	3	21.6%	4	11.5%	4
Brighton City Centre	10.0%	65	5.4%	5	0.0%	0	5.7%	4	10.0%	16	2.5%	0	2.0%	0	15.4%	5
Guildford City Centre	9.1%	59	16.1%	16	37.5%	13	15.1%	10	0.0%	0	20.0%	2	13.7%	3	19.2%	6
Worthing Town Centre	4.7%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	0	5.9%	1	5.8%	2
Croydon Town Centre	3.6%	24	3.6%	3	0.0%	0	0.0%	0	12.5%	20	2.5%	0	2.0%	0	0.0%	0
Chichester Town Centre	3.4%	22	0.0%	0	2.5%	1	0.0%	0	0.0%	0	12.5%	1	9.8%	2	0.0%	0
Redhill Town Centre	3.2%	21	5.4%	5	0.0%	0	0.0%	0	10.0%	16	0.0%	0	0.0%	0	0.0%	0
Other	2.5%	16	5.4%	5	5.0%	2	3.8%	3	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Central London	2.3%	15	7.1%	7	2.5%	1	3.8%	3	0.0%	0	0.0%	0	2.0%	0	1.9%	1
Bluewater Shopping Centre, Kent	2.2%	15	3.6%	3	0.0%	0	3.8%	3	2.5%	4	0.0%	0	3.9%	1	0.0%	0
Kingston upon Thames Town Centre	2.1%	14	10.7%	10	2.5%	1	1.9%	1	0.0%	0	2.5%	0	0.0%	0	1.9%	1
Dorking Town Centre	1.4%	9	5.4%	5	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.2%	8	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Reigate Town Centre	0.9%	6	1.8%	2	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portsmouth City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	0.3%	2	0.0%	0	2.5%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley Town Centre	0.2%	1	0.0%	0	2.5%	1	0.0%	0	0.0%	0	2.5%	0	2.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Findon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	7.0%	46	3.6%	3	7.5%	3	3.8%	3	7.5%	12	5.0%	0	9.8%	2	9.6%	3
Weighted base:		654		97		34		67		156		9		19		32
Sample:		688		56		40		53		40		40		51		52

Q08 Where do you do most of your households shopping for furniture, floor coverings and household textiles?
Those who go shopping for furniture, floor coverings and household textiles at Q08 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q08)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Crawley Town Centre	20.8%	153	23.2%	23	4.2%	2	10.0%	6	44.6%	98	2.3%	0	11.1%	2	20.8%	6
Horsham Town Centre	17.0%	125	1.8%	2	22.9%	9	48.0%	30	7.1%	16	18.6%	2	44.4%	9	31.3%	9
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	9.2%	67	12.5%	12	0.0%	0	16.0%	10	16.1%	35	0.0%	0	1.9%	0	2.1%	1
Worthing Town Centre	4.8%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	4.5%	33	14.3%	14	18.8%	8	0.0%	0	0.0%	0	27.9%	3	3.7%	1	6.3%	2
Croydon Town Centre	3.8%	28	7.1%	7	0.0%	0	2.0%	1	7.1%	16	0.0%	0	1.9%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	3.7%	27	0.0%	0	8.3%	3	8.0%	5	0.0%	0	4.7%	0	3.7%	1	8.3%	2
Horley Town Centre	3.6%	26	0.0%	0	0.0%	0	0.0%	0	10.7%	23	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	2.2%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	2.1%	1
Other	1.9%	14	0.0%	0	2.1%	1	0.0%	0	1.8%	4	4.7%	0	0.0%	0	0.0%	0
Chichester Town Centre	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	0	3.7%	1	0.0%	0
Homebase, Crawley Avenue, Crawley, RH10 2N	1.7%	12	0.0%	0	0.0%	0	0.0%	0	5.4%	12	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	1.5%	11	5.4%	5	4.2%	2	2.0%	1	0.0%	0	2.3%	0	1.9%	0	0.0%	0
Central London	1.4%	11	1.8%	2	0.0%	0	2.0%	1	0.0%	0	4.7%	0	5.6%	1	0.0%	0
Ikea, Valley Park, Purley Way, Croydon	1.2%	9	1.8%	2	2.1%	1	2.0%	1	0.0%	0	0.0%	0	1.9%	0	2.1%	1
Cranleigh Town Centre	1.1%	8	0.0%	0	18.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	0.9%	6	3.6%	3	6.3%	3	0.0%	0	0.0%	0	4.7%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.7%	5	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Dorking Town Centre	0.6%	4	3.6%	3	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hove Town Centre	0.5%	3	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.3%	2	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.2%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, London Road, Reigate, RH2 0QS	0.2%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.2%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	0.2%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	7.4%	1	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Burgess Hill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0
Wickes, Vincent Lane, Dorking, RH4 3HQ	0.1%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpetright, Haslett Avenue, Crawley, RH10 1N	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	11.5%	85	14.3%	14	8.3%	3	6.0%	4	7.1%	16	16.3%	2	11.1%	2	20.8%	6
Weighted base:		736		97		41		63		219		10		20		30
Sample:		715		56		48		50		56		43		54		48

Column %ges.

Q09 Where do you do most of your households shopping for DIY and decorating goods?
Those who go shopping for DIY and decorating goods at Q09 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q09)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	23.4%	206	4.8%	5	19.7%	10	67.2%	54	0.0%	0	46.2%	7	48.3%	11	62.5%	25
Crawley Town Centre	16.2%	142	0.0%	0	0.0%	0	1.6%	1	50.0%	129	1.5%	0	0.0%	0	3.1%	1
Horsham Town Centre	7.2%	63	0.0%	0	8.2%	4	12.5%	10	1.5%	4	12.3%	2	30.0%	7	17.2%	7
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	5.6%	49	0.0%	0	0.0%	0	6.3%	5	16.7%	43	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	3.9%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Homebase, Crawley Avenue, Crawley, RH10 2N	3.9%	34	1.6%	2	0.0%	0	1.6%	1	10.6%	27	0.0%	0	0.0%	0	1.6%	1
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	3.8%	34	1.6%	2	0.0%	0	1.6%	1	10.6%	27	0.0%	0	3.3%	1	0.0%	0
Dorking Town Centre	3.0%	26	21.0%	23	6.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	2.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, Vincent Lane, Dorking, RH4 3HQ	2.3%	20	17.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	1.6%	1
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	2.0%	18	3.2%	3	18.0%	9	0.0%	0	1.5%	4	6.2%	1	0.0%	0	0.0%	0
Homebase, London Road, Reigate, RH2 0QS	1.8%	16	14.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	1.4%	12	11.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	1.3%	12	0.0%	0	0.0%	0	0.0%	0	4.5%	12	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	1.1%	9	0.0%	0	18.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	1.0%	9	0.0%	0	4.9%	3	0.0%	0	0.0%	0	4.6%	1	0.0%	0	10.9%	4
Burgess Hill Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Discovery Park, Chichester, PO19 6U	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	0.9%	8	3.2%	3	6.6%	3	0.0%	0	0.0%	0	4.6%	1	0.0%	0	0.0%	0
B&Q, Kingston Road, Leatherhead	0.8%	7	6.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.7%	7	1.6%	2	1.6%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	2	15.0%	3	0.0%	0
Storrington Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Brighton Road, Shoreham-by-Sea	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, Dominion road, Worthing, BN14 8J	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.4%	4	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
B&Q, Woodbridge Road, Guildford, GU1 1AJ	0.3%	3	1.6%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Godalming Town Centre	0.3%	3	0.0%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.2%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	0.2%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Foundry Retail Park, Horsham, RH13 5P (Dreams)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rustington Retail Park, Barn Nursery, Rustingon, Littlehampton, BN16 3R (Focus, Halfords, Pets at Home)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.1%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Red Square Retail Park, Upper Brighton Road, Worthing, BN14 9E (Argos, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpetright, Haslett Avenue, Crawley, RH10 1N	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	5.9%	52	9.7%	10	9.8%	5	4.7%	4	4.5%	12	1.5%	0	0.0%	0	3.1%	1
Weighted base:		877		108		52		80		258		15		22		40
Sample:		875		62		61		64		66		65		60		64

Q10 Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles?
Those who go shopping for domestic appliances such as washing machines, fridges cookers and kettles at Q10 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q10

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	23.0%	172	12.5%	12	5.6%	3	18.7%	11	61.4%	137	2.1%	0	1.9%	0	3.8%	1
Horsham Town Centre	19.5%	145	5.4%	5	14.8%	7	43.8%	26	0.0%	0	22.9%	3	59.3%	12	67.3%	22
Crawley Town Centre	12.8%	95	5.4%	5	0.0%	0	6.3%	4	33.3%	74	2.1%	0	1.9%	0	5.8%	2
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	5.3%	39	0.0%	0	3.7%	2	20.8%	13	0.0%	0	12.5%	1	1.9%	0	5.8%	2
Worthing Town Centre	4.4%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Dorking Town Centre	4.2%	31	30.4%	30	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	2.9%	22	19.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	2.2%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	1.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Other	1.8%	13	3.6%	3	0.0%	0	0.0%	0	3.5%	8	2.1%	0	0.0%	0	0.0%	0
Guildford City Centre	1.6%	12	1.8%	2	16.7%	8	0.0%	0	0.0%	0	16.7%	2	1.9%	0	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	1.6%	12	1.8%	2	18.5%	8	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	1.6%	12	0.0%	0	1.9%	1	2.1%	1	0.0%	0	4.2%	0	5.6%	1	5.8%	2
Kingston upon Thames Town Centre	1.0%	7	3.6%	3	1.9%	1	2.1%	1	0.0%	0	2.1%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramley Village	0.6%	5	0.0%	0	9.3%	4	0.0%	0	0.0%	0	4.2%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0
Findon Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	0.5%	3	0.0%	0	7.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	0	11.1%	2	0.0%	0
Redhill Town Centre	0.3%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	1.9%	1
Central London	0.2%	2	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.2%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Hove Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croydon Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Foundry Retail Park, Horsham, RH13 5P (Dreams)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming Town Centre	0.1%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Red Square Retail Park, Upper Brighton Road, Worthing, BN14 9E (Argos, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	7.0%	52	14.3%	14	11.1%	5	4.2%	3	1.8%	4	10.4%	1	7.4%	1	5.8%	2
Weighted base:		744		97		46		60		223		11		20		32
Sample:		727		56		54		48		57		48		54		52

Q11 Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment?
Those who go shopping for TV, Hi-Fi, Radio, photographic and computer equipment at Q11 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q11)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	24.1%	176	18.9%	17	4.1%	2	16.7%	10	57.6%	133	2.0%	0	6.0%	1	3.9%	1
Horsham Town Centre	17.7%	129	3.8%	3	24.5%	10	45.8%	28	0.0%	0	23.5%	3	50.0%	9	58.8%	19
Crawley Town Centre	15.5%	114	9.4%	9	0.0%	0	6.3%	4	35.6%	82	2.0%	0	4.0%	1	7.8%	2
Worthing Town Centre	4.3%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	4.1%	30	0.0%	0	0.0%	0	20.8%	13	0.0%	0	7.8%	1	2.0%	0	2.0%	1
Dorking Town Centre	2.9%	21	22.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	2.5%	18	5.7%	5	24.5%	10	0.0%	0	0.0%	0	15.7%	2	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	2.4%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.0%	14	7.5%	7	0.0%	0	0.0%	0	1.7%	4	2.0%	0	0.0%	0	2.0%	1
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	1.9%	14	0.0%	0	2.0%	1	2.1%	1	0.0%	0	5.9%	1	0.0%	0	9.8%	3
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	1.8%	13	3.8%	3	18.4%	8	0.0%	0	0.0%	0	9.8%	1	0.0%	0	0.0%	0
Brighton City Centre	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Pulborough Town Centre	1.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.9%	7	3.8%	3	2.0%	1	0.0%	0	0.0%	0	3.9%	0	2.0%	0	0.0%	0
Billingshurst Town Centre	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	1	24.0%	4	2.0%	1
Reigate Town Centre	0.7%	5	5.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.5%	4	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	4	0.0%	0	0.0%	0	0.0%	0
Bramley Village	0.5%	4	0.0%	0	8.2%	3	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Findon Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.4%	3	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	2.0%	1
Hove Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	0.2%	2	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Foundry Retail Park, Horsham, RH13 5P	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
(Dreams)																
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	8.1%	59	17.0%	16	12.2%	5	6.3%	4	3.4%	8	7.8%	1	8.0%	1	9.8%	3
Weighted base:		730		92		42		60		231		12		19		32
Sample:		710		53		49		48		59		51		50		51

Column %ges.

Q12 Where do you do most of your households shopping on personal / luxury goods including books, jewellery, china, glass and cosmetics?
Those who go shopping for personal / luxury goods including books, jewellery, china, glass and cosmetics at Q12 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' a

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Horsham Town Centre	30.6%	225	3.4%	3	30.4%	14	82.1%	58	0.0%	0	37.3%	4	61.8%	13	80.0%	30
Crawley Town Centre	26.8%	197	15.3%	16	3.6%	2	7.1%	5	82.0%	160	2.0%	0	1.8%	0	3.3%	1
Worthing Town Centre	6.2%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	6.0%	44	20.3%	21	28.6%	14	1.8%	1	0.0%	0	31.4%	4	3.6%	1	0.0%	0
Dorking Town Centre	3.8%	28	27.1%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	3.4%	25	1.7%	2	0.0%	0	1.8%	1	2.0%	4	0.0%	0	1.8%	0	0.0%	0
Chichester Town Centre	2.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	1	5.5%	1	0.0%	0
Reigate Town Centre	2.4%	17	16.9%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	1.1%	8	0.0%	0	16.1%	8	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	1.0%	7	3.4%	3	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.8%	6	3.4%	3	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Central London	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	1.8%	0	1.7%	1
Croydon Town Centre	0.8%	6	1.7%	2	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, currys, PC World, Halfor	0.7%	5	0.0%	0	0.0%	0	1.8%	1	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.6%	4	0.0%	0	5.4%	3	0.0%	0	0.0%	0	2.0%	0	1.8%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	12.7%	3	0.0%	0
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.2%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Burgess Hill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Epsom Town Centre	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Valley Park, Purley Way, Croydon	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	7.3%	54	6.8%	7	10.7%	5	3.6%	3	6.0%	12	7.8%	1	5.5%	1	11.7%	4
Weighted base:		737		103		48		70		195		12		21		37
Sample:		747		59		56		56		50		51		55		60

Q13 How often do you visit Horsham Town Centre?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Everyday	3.6%	36	0.0%	0	0.0%	0	8.5%	8	0.0%	0	1.4%	0	2.8%	1	7.0%	3
2 – 3 times a week	8.6%	86	1.4%	2	2.8%	2	22.5%	20	0.0%	0	2.8%	0	2.8%	1	28.2%	12
Once a week	13.9%	139	2.8%	3	21.1%	13	45.1%	40	2.7%	8	26.8%	4	28.2%	7	31.0%	14
Once a fortnight	11.6%	116	5.6%	7	16.9%	10	15.5%	14	10.7%	31	16.9%	3	25.4%	7	22.5%	10
Once a month	10.7%	107	12.5%	16	12.7%	8	7.0%	6	9.3%	27	18.3%	3	25.4%	7	7.0%	3
Once every 3 months	11.9%	119	11.1%	14	7.0%	4	0.0%	0	22.7%	66	15.5%	3	7.0%	2	4.2%	2
Once every 6 months	6.6%	66	11.1%	14	15.5%	9	0.0%	0	8.0%	23	4.2%	1	4.2%	1	0.0%	0
Once a year	4.3%	43	4.2%	5	2.8%	2	0.0%	0	6.7%	20	1.4%	0	0.0%	0	0.0%	0
Less often	2.4%	24	6.9%	9	7.0%	4	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0
(Don't know / varies)	0.2%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Never)	26.2%	262	44.4%	56	12.7%	8	1.4%	1	40.0%	117	8.4%	1	4.2%	1	0.0%	0
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

Q14 What do you like about Horsham Town Centre?
Those who visit Horsham Town Centre at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Close to home	17.3%	128	5.0%	3	12.9%	7	45.7%	40	0.0%	0	21.5%	3	19.1%	5	23.9%	11
Close to work / en route to work	1.8%	13	0.0%	0	0.0%	0	2.9%	3	2.2%	4	0.0%	0	2.9%	1	0.0%	0
Easily accessible by foot / cycle	3.6%	27	2.5%	2	6.5%	3	1.4%	1	0.0%	0	4.6%	1	2.9%	1	5.6%	2
Good and / or free car parking	9.1%	67	15.0%	10	14.5%	8	2.9%	3	6.7%	12	15.4%	2	13.2%	3	12.7%	6
Good bus service / accessible public transport	2.3%	17	5.0%	3	3.2%	2	0.0%	0	2.2%	4	0.0%	0	4.4%	1	1.4%	1
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	4.3%	31	7.5%	5	4.8%	3	1.4%	1	8.9%	16	1.5%	0	1.5%	0	0.0%	0
Good range of chain / well known stores	18.8%	139	20.0%	14	21.0%	11	22.9%	20	20.0%	35	24.6%	4	26.5%	7	14.1%	6
Good range of independent stores	17.6%	130	20.0%	14	8.1%	4	12.9%	11	26.7%	47	16.9%	3	23.5%	6	15.5%	7
Restaurant / cafes	2.9%	22	2.5%	2	1.6%	1	2.9%	3	2.2%	4	6.2%	1	4.4%	1	4.2%	2
Bars / pubs / clubs	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	1.5%	0	0.0%	0
Leisure facilities	1.2%	9	2.5%	2	1.6%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0	1.4%	1
Good range of services (bank, library, hairdresser etc.)	1.1%	8	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.5%	0	4.4%	1	2.8%	1
Good prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Attractive environment	32.5%	240	45.0%	31	32.3%	17	37.1%	33	35.6%	63	16.9%	3	32.4%	8	21.1%	9
Cleanliness	3.3%	24	7.5%	5	3.2%	2	5.7%	5	0.0%	0	1.5%	0	4.4%	1	5.6%	2
Safe and secure	2.3%	17	0.0%	0	3.2%	2	0.0%	0	2.2%	4	3.1%	0	11.8%	3	1.4%	1
Indoor shopping malls / arcades	5.7%	42	2.5%	2	1.6%	1	1.4%	1	8.9%	16	21.5%	3	2.9%	1	5.6%	2
Other	1.5%	11	2.5%	2	1.6%	1	0.0%	0	2.2%	4	0.0%	0	2.9%	1	0.0%	0
Compact	10.7%	79	17.5%	12	12.9%	7	8.6%	8	8.9%	16	12.3%	2	16.2%	4	14.1%	6
Flat / even surface	1.0%	7	0.0%	0	9.7%	5	0.0%	0	0.0%	0	4.6%	1	0.0%	0	1.4%	1
Friendly people / atmosphere	2.1%	15	5.0%	3	1.6%	1	4.3%	4	0.0%	0	3.1%	0	1.5%	0	2.8%	1
Pedestrianised area	2.4%	18	0.0%	0	0.0%	0	5.7%	5	0.0%	0	0.0%	0	5.9%	1	2.8%	1
Not too crowded	1.0%	7	0.0%	0	1.6%	1	1.4%	1	0.0%	0	1.5%	0	2.9%	1	2.8%	1
Familiar with the area	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Not too big	1.2%	9	0.0%	0	1.6%	1	1.4%	1	2.2%	4	7.7%	1	0.0%	0	0.0%	0
Good layout	1.3%	10	0.0%	0	3.2%	2	2.9%	3	2.2%	4	0.0%	0	0.0%	0	0.0%	0
Has a park and ride system	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preference for specific store	0.4%	3	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Old fashioned	1.0%	7	0.0%	0	0.0%	0	1.4%	1	2.2%	4	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	13.5%	100	15.0%	10	14.5%	8	8.6%	8	13.3%	23	13.8%	2	5.9%	1	21.1%	9
(Don't know)	2.0%	15	5.0%	3	3.2%	2	1.4%	1	0.0%	0	1.5%	0	0.0%	0	2.8%	1
Weighted base:		738		70		53		88		176		15		25		44
Sample:		807		40		62		70		45		65		68		71

Q15 What do you dislike about Horsham Town Centre?
Those who visit Horsham Town Centre at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Difficult to park	9.9%	73	12.5%	9	9.7%	5	2.9%	3	8.9%	16	15.4%	2	10.3%	3	12.7%	6
Difficult to park near shops	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	2.9%	1	2.8%	1
Too long / inconvenient journey	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.6%	5	0.0%	0	1.6%	1	1.4%	1	0.0%	0	3.1%	0	0.0%	0	0.0%	0
Poor bus services	0.8%	6	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	0	1.4%	1
Poor accessibility by foot / cycle	0.3%	2	0.0%	0	1.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of foodstores	2.4%	18	0.0%	0	1.6%	1	5.7%	5	0.0%	0	0.0%	0	4.4%	1	2.8%	1
Lack of non-food stores	11.8%	87	5.0%	3	11.3%	6	15.7%	14	2.2%	4	13.8%	2	8.8%	2	18.3%	8
Lack of eating and drinking places	1.0%	7	0.0%	0	0.0%	0	1.4%	1	2.2%	4	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.9%	6	0.0%	0	1.6%	1	2.9%	3	0.0%	0	3.1%	0	1.5%	0	1.4%	1
Poor security for shoppers / cars	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor lighting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access for disabled	0.4%	3	0.0%	0	1.6%	1	1.4%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Vacant shops	2.8%	21	0.0%	0	0.0%	0	7.1%	6	0.0%	0	3.1%	0	4.4%	1	7.0%	3
Other	3.0%	22	2.5%	2	3.2%	2	2.9%	3	2.2%	4	1.5%	0	2.9%	1	0.0%	0
Expensive parking	5.4%	40	0.0%	0	4.8%	3	15.7%	14	0.0%	0	6.2%	1	13.2%	3	11.3%	5
Too many restaurants / cafes	0.8%	6	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.5%	0	0.0%	0	1.4%	1
The cobbled streets	0.7%	5	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	4.4%	1	2.8%	1
Poor sculptures / fountains	1.7%	12	0.0%	0	0.0%	0	5.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / improved seating areas	0.2%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
Poor quality shops	0.6%	4	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	0	1.4%	1
Unattractive environment	0.5%	4	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Poor layout	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many pound / charity shops	0.4%	3	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Nothing / very little	62.1%	458	77.5%	54	58.1%	31	45.7%	40	86.7%	152	61.5%	9	54.4%	14	46.5%	21
(Don't know)	2.1%	15	2.5%	2	4.8%	3	0.0%	0	0.0%	0	0.0%	0	2.9%	1	4.2%	2
Weighted base:		738		70		53		88		176		15		25		44
Sample:		807		40		62		70		45		65		68		71

Q16 What would make you shop in or visit Horsham Town Centre more often?
Those who visit Horsham Town Centre at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	3.1%	23	0.0%	0	4.8%	3	2.9%	3	4.4%	8	3.1%	0	1.5%	0	0.0%	0
Cheaper parking	7.8%	58	2.5%	2	8.1%	4	20.0%	18	2.2%	4	7.7%	1	7.4%	2	7.0%	3
Cheaper prices	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Easier / more parking	8.6%	63	10.0%	7	6.5%	3	8.6%	8	11.1%	20	12.3%	2	4.4%	1	7.0%	3
More food stores	1.7%	13	0.0%	0	1.6%	1	2.9%	3	2.2%	4	1.5%	0	4.4%	1	1.4%	1
More leisure facilities (e.g. cinema etc.)	0.7%	5	0.0%	0	0.0%	0	1.4%	1	2.2%	4	1.5%	0	0.0%	0	0.0%	0
More non-food stores	10.0%	74	7.5%	5	6.5%	3	22.9%	20	2.2%	4	7.7%	1	17.6%	4	16.9%	7
More department stores	11.6%	85	15.0%	10	12.9%	7	8.6%	8	8.9%	16	18.5%	3	16.2%	4	9.9%	4
More higher order / designer stores	5.6%	41	2.5%	2	4.8%	3	5.7%	5	6.7%	12	3.1%	0	5.9%	1	5.6%	2
More places to eat / drink	0.8%	6	0.0%	0	1.6%	1	1.4%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.3%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.5%	0	2.9%	1	1.4%	1
More specialist/unusual shops	4.3%	32	5.0%	3	1.6%	1	4.3%	4	0.0%	0	4.6%	1	8.8%	2	9.9%	4
More independent shops	3.6%	26	2.5%	2	3.2%	2	1.4%	1	0.0%	0	3.1%	0	7.4%	2	9.9%	4
Other	1.0%	7	2.5%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / improved public toilets	0.4%	3	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
New / improved seating areas	0.5%	3	2.5%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
Nothing	53.0%	392	52.5%	37	54.8%	29	38.6%	34	60.0%	106	44.6%	7	45.6%	12	62.0%	27
(Don't know)	3.9%	29	5.0%	3	3.2%	2	1.4%	1	4.4%	8	1.5%	0	7.4%	2	2.8%	1
Weighted base:		738		70		53		88		176		15		25		44
Sample:		807		40		62		70		45		65		68		71

Q17 Do you ever use the Park and Ride to visit Horsham Town Centre?
Those who visit Horsham Town Centre at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Yes	7.4%	54	0.0%	0	1.6%	1	7.1%	6	6.7%	12	7.7%	1	10.3%	3	9.9%	4
No	3.8%	28	0.0%	0	3.2%	2	4.3%	4	2.2%	4	3.1%	0	8.8%	2	8.5%	4
Never	88.9%	656	100.0%	70	95.2%	50	88.6%	78	91.1%	160	89.2%	13	80.9%	21	81.7%	36
Weighted base:		738		70		53		88		176		15		25		44
Sample:		807		40		62		70		45		65		68		71

Q18 How often do you use the Park and Ride to visit Horsham Town Centre compared to your car usage?
Those who ever use the park and ride to visit Horsham Town Centre at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
More than I use the car	38.3%	21	0.0%	0	0.0%	0	0.0%	0	33.3%	4	40.0%	0	28.6%	1	42.9%	2
Less than I use the car	40.4%	22	0.0%	0	100.1%	1	100.0%	6	33.3%	4	40.0%	0	42.8%	1	28.6%	1
About the Same	18.2%	10	0.0%	0	0.0%	0	0.0%	0	33.3%	4	20.0%	0	28.6%	1	28.6%	1
I don't have the use of a car	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		54		0		1		6		12		1		3		4
Sample:		75		0		1		5		3		5		7		7

Q19 Do you visit Southwater or Billingshurst most often for your shopping or service requirements?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Southwater	8.6%	86	1.4%	2	1.4%	1	9.9%	9	5.3%	16	0.0%	0	0.0%	0	69.0%	30
Billingshurst	8.4%	84	2.8%	3	9.9%	6	7.0%	6	1.3%	4	74.6%	12	90.1%	24	11.3%	5
Neither	82.8%	828	94.4%	118	88.7%	53	83.1%	74	93.3%	274	25.4%	4	9.9%	3	18.3%	8
(Don't know)	0.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

Q20 For what reason or reasons do you visit Southwater shopping centre?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Close to home	29.6%	25	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	63.3%	19
Close to work / en route to work	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Easily accessible by foot / cycle	5.3%	5	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	2.0%	1
Good and / or free car parking	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good bus service / accessible public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Good range of chain / well known stores	9.9%	9	0.0%	0	100.1%	1	14.3%	1	0.0%	0	0.0%	0	0.0%	0	10.2%	3
Good range of independent stores	10.0%	9	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	14.3%	4
Restaurant / cafes	6.1%	5	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	1
Bars / pubs / clubs	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	3.4%	3	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	24.9%	21	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	30.6%	9
Good prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	6.5%	6	100.0%	2	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Other	1.5%	1	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Visiting friends / relatives	5.6%	5	0.0%	0	0.0%	0	28.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	6.0%	5	0.0%	0	0.0%	0	14.3%	1	25.0%	4	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		86		2		1		9		16		0		0		30
Sample:		108		1		1		7		4		0		0		49

Q21 How often do you visit Southwater?

Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Everyday	10.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.6%	9
2 – 3 times a week	16.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.7%	10
Once a week	12.6%	11	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	22.4%	7
Once a fortnight	7.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	3
Once a month	23.3%	20	0.0%	0	0.0%	0	71.4%	6	25.0%	4	0.0%	0	0.0%	0	2.0%	1
Once every 3 months	14.3%	12	0.0%	0	100.1%	1	0.0%	0	50.0%	8	0.0%	0	0.0%	0	0.0%	0
Once every 6 months	8.6%	7	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	2.0%	1
Once a year	4.0%	3	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	2.0%	2	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Weighted base:		86		2		1		9		16		0		0		30
Sample:		108		1		1		7		4		0		0		49

Q22 What do you like about Southwater?

Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Close to home	15.5%	13	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	30.6%	9
Close to work / en route to work	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easily accessible by foot / cycle	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	17.3%	15	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	16.3%	5
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Good range of chain / well known stores	7.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	4
Good range of independent stores	11.9%	10	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	18.4%	6
Restaurant / cafes	6.7%	6	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Bars / pubs / clubs	4.3%	4	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	2
Leisure facilities	2.2%	2	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Good range of services (bank, library, hairdresser etc.)	7.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	4
Good prices	1.0%	1	0.0%	0	100.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	27.9%	24	100.0%	2	0.0%	0	0.0%	0	75.0%	12	0.0%	0	0.0%	0	20.4%	6
Cleanliness	2.5%	2	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Safe and secure	6.0%	5	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	4.1%	1
Indoor shopping malls / arcades	4.5%	4	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	1
Other	9.4%	8	0.0%	0	100.1%	1	0.0%	0	25.0%	4	0.0%	0	0.0%	0	6.1%	2
Has everything I need	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	2
Nothing / very little	16.8%	14	0.0%	0	0.0%	0	28.6%	3	25.0%	4	0.0%	0	0.0%	0	6.1%	2
(Don't know)	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Weighted base:		86		2		1		9		16		0		0		30
Sample:		108		1		1		7		4		0		0		49

Q23 How do you travel to Southwater?

Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car / Van (as driver)	72.7%	62	100.0%	2	100.1%	1	71.4%	6	100.0%	16	0.0%	0	0.0%	0	38.8%	12
Car / van (as passenger)	4.1%	4	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	2.1%	2	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	18.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.1%	16
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	2
Weighted base:		86		2		1		9		16		0		0		30
Sample:		108		1		1		7		4		0		0		49

Q24 What would make you shop in or visit Southwater more often?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier / more parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More food stores	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
More leisure facilities (e.g. cinema etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More non-food stores	5.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1
More department stores	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More higher order / designer stores	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More places to eat / drink	5.6%	5	0.0%	0	0.0%	0	0.0%	0	25.0%	4	0.0%	0	0.0%	0	0.0%	0
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
More specialist/unusual shops	5.7%	5	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
More independent shops	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing	79.0%	68	100.0%	2	100.1%	1	85.7%	8	75.0%	12	0.0%	0	0.0%	0	89.8%	27
(Don't know)	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1
Weighted base:		86		2		1		9		16		0		0		30
Sample:		108		1		1		7		4		0		0		49

Q25 For what reason or reasons do you visit Billingshurst shopping centre?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Close to home	33.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.8%	9	75.0%	18	0.0%	0
Close to work / en route to work	5.5%	5	0.0%	0	0.0%	0	20.0%	1	0.0%	0	0.0%	0	3.1%	1	0.0%	0
Easily accessible by foot / cycle	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Good and / or free car parking	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	8.8%	7	50.0%	2	28.6%	2	0.0%	0	0.0%	0	7.6%	1	3.1%	1	25.0%	1
Good range of independent stores	20.2%	17	50.0%	2	42.9%	3	20.0%	1	0.0%	0	13.2%	2	10.9%	3	25.0%	1
Restaurant / cafes	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Bars / pubs / clubs	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	4.2%	4	0.0%	0	14.3%	1	20.0%	1	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	27.2%	23	0.0%	0	28.6%	2	20.0%	1	0.0%	0	45.3%	6	28.1%	7	25.0%	1
Good prices	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	12.5%	1
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Other	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	3.1%	1	25.0%	1
Recycling facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good food stores	3.3%	3	0.0%	0	0.0%	0	20.0%	1	0.0%	0	1.9%	0	3.1%	1	0.0%	0
Visiting friends / relatives	2.8%	2	0.0%	0	0.0%	0	20.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buy pet products	2.6%	2	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	7.0%	6	0.0%	0	0.0%	0	0.0%	0	100.0%	4	0.0%	0	1.6%	0	0.0%	0
(Don't know)	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	

Q26 How often do you visit Billingshurst?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Everyday	11.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	31.3%	7	0.0%	0
2 – 3 times a week	19.8%	17	0.0%	0	0.0%	0	20.0%	1	0.0%	0	15.1%	2	48.4%	12	12.5%	1
Once a week	15.0%	13	0.0%	0	14.3%	1	0.0%	0	0.0%	0	34.0%	4	17.2%	4	12.5%	1
Once a fortnight	20.1%	17	0.0%	0	14.3%	1	40.0%	3	100.0%	4	15.1%	2	3.1%	1	50.0%	2
Once a month	14.9%	13	50.0%	2	28.6%	2	20.0%	1	0.0%	0	13.2%	2	0.0%	0	25.0%	1
Once every 3 months	11.6%	10	50.0%	2	28.6%	2	20.0%	1	0.0%	0	13.2%	2	0.0%	0	0.0%	0
Once every 6 months	4.8%	4	0.0%	0	14.3%	1	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Once a year	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

Q27 What do you like about Billingshurst?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Close to home	27.9%	23	0.0%	0	14.3%	1	0.0%	0	0.0%	0	41.5%	5	59.4%	14	12.5%	1
Close to work / en route to work	2.1%	2	0.0%	0	0.0%	0	20.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easily accessible by foot / cycle	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	6.2%	1	0.0%	0
Good and / or free car parking	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	1	6.2%	1	12.5%	1
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	1	1.6%	0	0.0%	0
Good range of independent stores	17.0%	14	50.0%	2	28.6%	2	0.0%	0	0.0%	0	18.9%	2	9.4%	2	25.0%	1
Restaurant / cafes	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	1	0.0%	0	0.0%	0
Bars / pubs / clubs	2.1%	2	0.0%	0	0.0%	0	20.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	4.9%	4	0.0%	0	0.0%	0	20.0%	1	0.0%	0	1.9%	0	3.1%	1	0.0%	0
Good range of services (bank, library, hairdresser etc.)	4.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	2	6.2%	1	0.0%	0
Good prices	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	9.6%	8	50.0%	2	14.3%	1	0.0%	0	0.0%	0	1.9%	0	15.6%	4	0.0%	0
Cleanliness	2.5%	2	50.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Safe and secure	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Indoor shopping malls / arcades	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	12.5%	1
Friendly people / atmosphere	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	10.9%	3	0.0%	0
Nothing / very little	30.0%	25	0.0%	0	42.9%	3	40.0%	3	100.0%	4	26.4%	3	17.2%	4	12.5%	1
(Don't know)	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.0%	1
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

Q28 How do you travel to Billingshurst?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car / Van (as driver)	64.1%	54	50.0%	2	85.7%	5	60.0%	4	0.0%	0	90.6%	11	31.3%	7	87.5%	4
Car / van (as passenger)	8.9%	7	50.0%	2	14.3%	1	40.0%	3	0.0%	0	7.6%	1	1.6%	0	0.0%	0
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	7.2%	6	0.0%	0	0.0%	0	0.0%	0	100.0%	4	1.9%	0	3.1%	1	12.5%	1
Train	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	18.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	62.5%	15	0.0%	0
Bicycle	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

Q29 What would make you shop in or visit Billingshurst more often?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	14.2%	12	0.0%	0	0.0%	0	20.0%	1	0.0%	0	13.2%	2	17.2%	4	37.5%	2
Cheaper prices	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier / more parking	13.2%	11	0.0%	0	0.0%	0	40.0%	3	0.0%	0	9.4%	1	15.6%	4	12.5%	1
More food stores	13.1%	11	0.0%	0	14.3%	1	0.0%	0	0.0%	0	17.0%	2	31.3%	7	12.5%	1
More leisure facilities (e.g. cinema etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More non-food stores	22.6%	19	0.0%	0	14.3%	1	0.0%	0	0.0%	0	28.3%	3	45.3%	11	25.0%	1
More department stores	7.1%	6	0.0%	0	14.3%	1	0.0%	0	0.0%	0	13.2%	2	12.5%	3	0.0%	0
More higher order / designer stores	4.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	1	9.4%	2	0.0%	0
More places to eat / drink	1.7%	1	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More specialist/unusual shops	12.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	2	28.1%	7	0.0%	0
More independent shops	9.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	1	26.6%	6	0.0%	0
Other	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	1.6%	0	0.0%	0
Get rid of the wheel clampers	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	1	0.0%	0
Nothing	47.4%	40	100.0%	3	71.4%	4	60.0%	4	100.0%	4	37.7%	5	15.6%	4	37.5%	2
(Don't know)	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

Q30 Which do you use most often - The Budgens in Billingshurst Town Centre or - The Tesco Express adjacent to Billingshurst train station?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Budgens, Billingshurst Town Centre	50.6%	43	0.0%	0	42.9%	3	40.0%	3	0.0%	0	66.0%	8	70.3%	17	75.0%	4
Tesco Express, Billingshurst train station	8.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	1	18.8%	4	0.0%	0
Neither	38.1%	32	100.0%	3	57.1%	3	60.0%	4	100.0%	4	20.8%	3	3.1%	1	25.0%	1
(Don't know / varies)	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	7.8%	2	0.0%	0
Weighted base:		84		3		6		6		4		12		24		5
Sample:		182		2		7		5		1		53		64		8

Column %ges.

Q31 What town centre do you visit most often for pubs / clubs?
Those who visit pubs / clubs at Q31 (Excluding those who said '(Don't do / visit)' at Q31)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Billingshurst Town Centre	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	0	37.9%	4	0.0%	0
Bognor Regis Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	3.2%	19	0.0%	0	0.0%	0	2.2%	1	2.2%	4	4.8%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.8%	4	2.4%	2	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	2.7%	16	0.0%	0	0.0%	0	2.2%	1	4.4%	8	4.8%	0	6.9%	1	2.6%	1
Chichester Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	1.8%	10	0.0%	0	30.0%	10	0.0%	0	0.0%	0	2.4%	0	0.0%	0	0.0%	0
Crawley Town Centre	19.3%	112	0.0%	0	0.0%	0	4.3%	3	60.0%	106	0.0%	0	3.5%	0	5.1%	1
Croydon Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0
Dorking Town Centre	8.1%	47	61.0%	43	7.5%	3	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.3%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	1.6%	9	2.4%	2	20.0%	7	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	21.3%	124	0.0%	0	5.0%	2	67.4%	39	4.4%	8	9.5%	1	20.7%	2	33.3%	8
Kingston upon Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	4.0%	23	22.0%	16	0.0%	0	0.0%	0	4.4%	8	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	1.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0	35.9%	9
Steyning Town Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1
Amberley Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ardingly Village	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arundel Town Centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Ashington Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowfold Village	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Village	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dial Post Village	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ewhurst Village	0.6%	3	0.0%	0	10.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	3.4%	20	0.0%	0	0.0%	0	0.0%	0	11.1%	20	0.0%	0	0.0%	0	0.0%	0
Loxwood Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	2	0.0%	0	0.0%	0
Partridge Green Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Village	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wisborough Green Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	2	0.0%	0	0.0%	0
Other	5.1%	30	0.0%	0	5.0%	2	13.0%	8	2.2%	4	16.7%	2	0.0%	0	5.1%	1
(Don't know / varies / no pattern)	10.0%	58	9.8%	7	22.5%	8	6.5%	4	6.7%	12	14.3%	1	27.6%	3	10.3%	2
Weighted base:		581		71		34		58		176		10		11		24
Sample:		553		41		40		46		45		42		29		39

Column %ges.

Q32 What town centre do you visit most often for restaurants/eating out?
Those who visit restaurants/eating out at Q32 (Excluding those who said '(Don't do / visit)' at Q32)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Billingshurst Town Centre	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	1	29.6%	6	1.8%	1
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	3.0%	25	1.6%	2	0.0%	0	0.0%	0	3.1%	8	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Central London	3.0%	26	1.6%	2	0.0%	0	0.0%	0	6.3%	16	1.8%	0	3.7%	1	1.8%	1
Chichester Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0	3.7%	1	0.0%	0
Cranleigh Town Centre	1.4%	11	0.0%	0	22.4%	11	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0
Crawley Town Centre	17.4%	148	0.0%	0	0.0%	0	9.1%	8	54.7%	137	3.5%	0	1.9%	0	1.8%	1
Croydon Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Town Centre	7.7%	65	54.1%	57	12.1%	6	0.0%	0	0.0%	0	1.8%	0	1.9%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	1.9%	17	3.3%	3	20.7%	10	1.5%	1	0.0%	0	12.3%	2	0.0%	0	0.0%	0
Haywards Heath Town Centre	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Henfield Town Centre	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	22.3%	189	1.6%	2	15.5%	8	75.8%	63	3.1%	8	10.5%	1	27.8%	6	38.6%	14
Kingston upon Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Pulborough Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	1.6%	13	1.6%	2	0.0%	0	0.0%	0	4.7%	12	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	4.6%	39	21.3%	23	0.0%	0	0.0%	0	6.3%	16	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	21.1%	7
Steyning Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	3.1%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	1.8%	1
Amberley Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arundel Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Ashington Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramber Village	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowfold Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Cuckfield Village	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dial Post Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Findon Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross Village	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	2.3%	20	0.0%	0	0.0%	0	0.0%	0	7.8%	20	0.0%	0	0.0%	0	0.0%	0
Loxwood Village	0.2%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Ockley Village	0.3%	2	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shipley Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Village	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Chiltington Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wisborough Green Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	0.0%	0
Other	3.1%	27	1.6%	2	13.8%	7	4.5%	4	3.1%	8	10.5%	1	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	14.6%	124	13.1%	14	10.3%	5	7.6%	6	10.9%	27	29.8%	4	22.2%	4	28.1%	10
Weighted base:		849		106		49		83		250		13		20		35
Sample:		823		61		58		66		64		57		54		57

Column %ges.

Q33 Where do you go most often to visit the cinema?
Those who visit the cinema at Q33 (Excluding those who said '(Don't do / visit)' at Q33)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Cineworld, 1 London Road, Crawley, West Sussex, RH10 2LR?	54.2%	343	30.2%	28	19.4%	6	72.4%	53	86.3%	172	17.8%	2	31.7%	5	43.9%	11
The Hawth Theatre & Conference Complex, Hawth Avenue, Crawley, RH10 6YZ	3.4%	22	0.0%	0	0.0%	0	0.0%	0	5.9%	12	0.0%	0	2.4%	0	2.4%	1
The Harlequin Theatre and Cinema, Warwick Quadrant, London Road, Redhill, RH1 1NN?	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Orion Cinema, Cyprus Road, Burgess Hill, West Sussex, RH15 8DX?	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Screen, Bancroft Road, Reigate, RH2 7RP?	4.9%	31	28.3%	26	2.8%	1	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Capitol Cinema, Horsham, North Street, Horsham, RH12 1RG	14.3%	91	0.0%	0	8.3%	3	24.1%	18	0.0%	0	22.2%	2	48.8%	7	43.9%	11
Windmill Entertainment Centre, Littlehampton, BN17 5LH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
King Street Picturehouse, East Grinstead, RH19 3DJ	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Dome Cinema, Worthing, BN11 3PT	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	0	2.4%	1
Chichester Cinema, New Park Centre, New Park Road, Chichester	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cineworld, Brighton Marina Village, Brighton	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cineworld, Chichester Gate, Chichester	3.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	1	2.4%	0	0.0%	0
Dorking Halls, Reigate Road, Dorking	3.3%	21	20.8%	19	5.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Bedford Road, Guildford	4.8%	30	9.4%	9	58.3%	18	0.0%	0	0.0%	0	35.6%	4	0.0%	0	0.0%	0
Odeon, Kingswest, West Street, Brighton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.7%	5	1.9%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	2.4%	0	0.0%	0
(Don't know / varies / no pattern)	5.9%	38	9.4%	9	5.6%	2	1.7%	1	3.9%	8	15.6%	2	9.8%	1	7.3%	2
Weighted base:		634		92		31		73		199		10		15		25
Sample:		584		53		36		58		51		45		41		41

Column %ges.

Q34 Where do you go most often to go ten pin bowling?
Those who go ten pin bowling at Q34 (Excluding those who said '(Don't do / visit)' at Q34)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
The Big Apple Superbowl, Horsham Leisure Park, Albion Way, Horsham, West Sussex, RH12 1AH	23.8%	97	18.5%	9	5.9%	1	60.5%	33	2.3%	4	41.7%	2	69.2%	3	36.4%	5
AMF Worthing Bowl, Marine Parade, Town Centre, Worthing, BN11 3QJ?	4.3%	17	0.0%	0	5.9%	1	0.0%	0	0.0%	0	4.2%	0	7.7%	0	4.5%	1
Hollywood Bowl, Crawley Leisure Park, London Road, Crawley, RH10 8LR?	61.8%	252	59.3%	28	47.1%	7	39.5%	21	93.0%	156	20.8%	1	15.4%	1	54.5%	7
Bowlplex, Marina Way, Brighton Marina, Brighton	3.6%	15	0.0%	0	0.0%	0	0.0%	0	2.3%	4	0.0%	0	0.0%	0	0.0%	0
Lakeside Superbowl, Terminus Road, Chichester Gate Leisure Park, Chichester, WEST SUSSEX PO19 8EL	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.8%	1	0.0%	0	0.0%	0
Guildford Spectrum	3.7%	15	18.5%	9	41.2%	6	0.0%	0	0.0%	0	4.2%	0	7.7%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	1.9%	8	3.7%	2	0.0%	0	0.0%	0	2.3%	4	8.3%	0	0.0%	0	4.5%	1
Weighted base:		409		47		14		54		168		6		5		14
Sample:		325		27		17		43		43		24		13		22

Q35 Where do you go most often to go to bingo?
Those who go to bingo at Q35 (Excluding those who said 'Internet / online' and '(Don't do / visit)' at Q35)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Gala Bingo, Kingsgate, Queensway, Town Centre, Crawley, RH10 1EN	79.1%	37	100.0%	3	100.0%	2	0.0%	0	100.0%	31	0.0%	0	50.0%	0	0.0%	0
Gala Bingo, Worthing, BN11 3JS	10.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crown Bingo, Bognor Regis, PO21 1PT	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Freshfield Way, Brighton	4.3%	2	0.0%	0	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / online	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	0	100.0%	1
Weighted base:		47		3		2		1		31		0		1		1
Sample:		31		2		2		1		8		0		2		2

Q36 Are there any leisure facilities that you think are lacking within a reasonable distance of your home?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
No	76.7%	767	79.2%	99	81.7%	49	93.0%	83	69.3%	203	81.7%	13	74.6%	20	74.6%	33
Yes, bingo	0.4%	4	1.4%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	0	1.4%	0	0.0%	0
Yes, bowling	1.3%	13	2.8%	3	0.0%	0	0.0%	0	1.3%	4	1.4%	0	1.4%	0	0.0%	0
Yes, cinema	2.0%	20	1.4%	2	4.2%	3	1.4%	1	1.3%	4	2.8%	0	1.4%	0	1.4%	1
Yes, leisure/ fitness centre	4.8%	48	8.3%	10	7.0%	4	1.4%	1	5.3%	16	4.2%	1	2.8%	1	1.4%	1
Yes, pubs/ clubs/ bars	1.3%	13	0.0%	0	0.0%	0	4.2%	4	1.3%	4	1.4%	0	0.0%	0	2.8%	1
Yes, restaurants/ cafes	0.9%	9	0.0%	0	1.4%	1	1.4%	1	1.3%	4	1.4%	0	4.2%	1	0.0%	0
Yes, shops	0.7%	7	1.4%	2	2.8%	2	0.0%	0	0.0%	0	4.2%	1	2.8%	1	0.0%	0
Yes, swimming pool	6.2%	62	5.6%	7	4.2%	3	2.8%	3	6.7%	20	8.4%	1	1.4%	0	5.6%	2
Yes, other	0.8%	8	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	1.4%	1
Yes, ice rink	6.3%	63	4.2%	5	0.0%	0	0.0%	0	13.3%	39	1.4%	0	0.0%	0	4.2%	2
Yes, tennis courts	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0
Yes, dry ski slope	0.3%	3	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0
Yes, youth clubs	0.6%	6	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	1.4%	1
Yes, theatres	0.5%	5	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0
Yes, football pitches	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	4	0.0%	0	0.0%	0	1.4%	1
Yes, arts and craft classes	0.3%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Yes, soft play areas / playgrounds etc	0.8%	8	0.0%	0	1.4%	1	0.0%	0	1.3%	4	0.0%	0	0.0%	0	1.4%	1
(Don't know)	1.3%	13	0.0%	0	0.0%	0	0.0%	0	1.3%	4	1.4%	0	5.6%	1	2.8%	1
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Male	32.6%	326	25.0%	31	31.0%	19	36.6%	33	37.3%	109	29.6%	5	16.9%	4	32.4%	14
Female	67.4%	674	75.0%	94	69.0%	42	63.4%	57	62.7%	184	70.4%	12	83.1%	22	67.6%	30
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

AGE Could I ask how old you are?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
18 to 24	1.2%	12	0.0%	0	0.0%	0	1.4%	1	2.7%	8	1.4%	0	0.0%	0	0.0%	0
25 to 34	3.5%	35	0.0%	0	1.4%	1	2.8%	3	6.7%	20	1.4%	0	2.8%	1	7.0%	3
35 to 44	18.0%	180	19.4%	24	12.7%	8	39.4%	35	20.0%	59	12.7%	2	8.5%	2	15.5%	7
45 to 54	29.1%	291	22.2%	28	25.4%	15	26.8%	24	40.0%	117	21.1%	3	23.9%	6	22.5%	10
55 to 64	18.1%	181	29.2%	37	19.7%	12	14.1%	13	13.3%	39	25.4%	4	18.3%	5	12.7%	6
65 +	29.8%	298	29.2%	37	40.8%	25	15.5%	14	17.3%	51	36.6%	6	46.5%	12	40.8%	18
(Refused)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	1.4%	1
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

EMP Which of the following best describes the chief wage earner of your household's current employment situation?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Working full time	53.4%	534	44.4%	56	40.8%	25	66.2%	59	65.3%	191	52.1%	9	36.6%	10	46.5%	21
Working part time	7.7%	77	11.1%	14	5.6%	3	8.5%	8	6.7%	20	7.0%	1	9.9%	3	7.0%	3
Unemployed	1.7%	17	0.0%	0	1.4%	1	2.8%	3	2.7%	8	1.4%	0	1.4%	0	2.8%	1
Retired	35.6%	357	40.3%	50	50.7%	31	19.7%	18	25.3%	74	39.4%	7	50.7%	13	40.8%	18
A housewife	0.4%	4	1.4%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A student	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
(Refused)	0.9%	9	2.8%	3	1.4%	1	1.4%	1	0.0%	0	0.0%	0	1.4%	0	1.4%	1
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

CAR How many cars does your household own or have the use of?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
None	9.4%	94	4.2%	5	4.2%	3	4.2%	4	14.7%	43	4.2%	1	15.5%	4	2.8%	1
One	41.5%	415	41.7%	52	35.2%	21	40.8%	36	41.3%	121	25.4%	4	42.3%	11	35.2%	16
Two	36.5%	365	41.7%	52	42.3%	25	35.2%	31	30.7%	90	52.1%	9	33.8%	9	49.3%	22
Three or more	11.3%	113	8.3%	10	15.5%	9	15.5%	14	13.3%	39	18.3%	3	8.5%	2	12.7%	6
(Refused)	1.4%	14	4.2%	5	2.8%	2	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

INC Approximately what is your total household income?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
£0 - £14,999	13.8%	138	18.1%	23	11.3%	7	5.6%	5	13.3%	39	7.0%	1	15.5%	4	18.3%	8
£15,000 - £19,999	5.8%	58	5.6%	7	4.2%	3	8.5%	8	5.3%	16	7.0%	1	5.6%	1	7.0%	3
£20,000 - £29,999	7.2%	72	12.5%	16	5.6%	3	5.6%	5	8.0%	23	8.4%	1	8.5%	2	2.8%	1
£30,000 - £39,999	6.2%	62	5.6%	7	4.2%	3	9.9%	9	4.0%	12	11.3%	2	5.6%	1	2.8%	1
£40,000 - £49,999	7.9%	79	5.6%	7	5.6%	3	7.0%	6	10.7%	31	8.4%	1	4.2%	1	7.0%	3
£50,000 - £59,999	7.3%	73	5.6%	7	2.8%	2	14.1%	13	10.7%	31	9.9%	2	0.0%	0	0.0%	0
£60,000 - £69,999	2.6%	26	4.2%	5	1.4%	1	1.4%	1	2.7%	8	0.0%	0	2.8%	1	4.2%	2
£70,000 - £79,999	2.7%	27	4.2%	5	1.4%	1	4.2%	4	1.3%	4	2.8%	0	2.8%	1	5.6%	2
£80,000 - £89,999	1.4%	14	1.4%	2	1.4%	1	4.2%	4	0.0%	0	2.8%	0	0.0%	0	1.4%	1
£90,000 - £99,999	0.4%	4	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£100,000 - £149,999	1.8%	18	4.2%	5	0.0%	0	2.8%	3	0.0%	0	1.4%	0	4.2%	1	1.4%	1
£150,000+	0.5%	5	1.4%	2	0.0%	0	2.8%	3	0.0%	0	0.0%	0	1.4%	0	0.0%	0
(Don't know / refused)	42.4%	424	31.9%	40	62.0%	37	32.4%	29	44.0%	129	40.8%	7	49.3%	13	49.3%	22
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

ETH The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
White (British / Irish / Other)	95.7%	957	95.8%	120	95.8%	58	97.2%	87	93.3%	274	97.2%	16	100.0%	27	98.6%	43
Black / Black British (Caribbean / African / other black)	0.6%	6	1.4%	2	0.0%	0	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0
Asian / Asian British (Indian / Pakistani / Bangladeshi / Other Asian)	1.7%	17	0.0%	0	0.0%	0	0.0%	0	5.3%	16	0.0%	0	0.0%	0	0.0%	0
Mixed (any mixed category)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chinese	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	2.0%	20	2.8%	3	4.2%	3	2.8%	3	0.0%	0	2.8%	0	0.0%	0	1.4%	1
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

SEG Socio-economic Group

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
A	4.1%	41	4.2%	5	9.9%	6	5.6%	5	2.7%	8	7.0%	1	2.8%	1	0.0%	0
B	18.4%	184	19.4%	24	21.1%	13	18.3%	16	12.0%	35	19.7%	3	29.6%	8	26.8%	12
C1	29.6%	296	31.9%	40	22.5%	14	33.8%	30	36.0%	106	22.5%	4	9.9%	3	21.1%	9
C2	13.1%	131	11.1%	14	18.3%	11	15.5%	14	12.0%	35	18.3%	3	12.7%	3	12.7%	6
D	14.0%	140	12.5%	16	4.2%	3	12.7%	11	21.3%	63	12.7%	2	11.3%	3	14.1%	6
E	13.2%	132	11.1%	14	9.9%	6	7.0%	6	12.0%	35	9.9%	2	22.5%	6	19.7%	9
(Refused)	7.5%	75	9.7%	12	14.1%	8	7.0%	6	4.0%	12	9.9%	2	11.3%	3	5.6%	2
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

ZON Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Zone 1	12.5%	125	100.0%	125	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	6.0%	60	0.0%	0	100.0%	60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	8.9%	89	0.0%	0	0.0%	0	100.0%	89	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	29.3%	293	0.0%	0	0.0%	0	0.0%	0	100.0%	293	0.0%	0	0.0%	0	0.0%	0
Zone 5	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	17	0.0%	0	0.0%	0
Zone 6	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	27	0.0%	0
Zone 7	4.4%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	44
Zone 8	10.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 9	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 10	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 11	5.4%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 12	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 13	3.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 14	5.9%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

Column %ges.

Horsham Shopping Household Telephone Survey
For GVA Grimley

SEC Postcode Sector

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
BN133	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BN140	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BN189	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BN443	3.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BN5 9	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU5 9	0.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 7	2.5%	25	0.0%	0	40.8%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 8	1.7%	17	0.0%	0	28.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH101	0.8%	8	0.0%	0	0.0%	0	0.0%	0	2.7%	8	0.0%	0	0.0%	0	0.0%	0
RH105	2.3%	23	0.0%	0	0.0%	0	0.0%	0	8.0%	23	0.0%	0	0.0%	0	0.0%	0
RH106	2.0%	20	0.0%	0	0.0%	0	0.0%	0	6.7%	20	0.0%	0	0.0%	0	0.0%	0
RH108	0.8%	8	0.0%	0	0.0%	0	0.0%	0	2.7%	8	0.0%	0	0.0%	0	0.0%	0
RH110	3.5%	35	0.0%	0	0.0%	0	0.0%	0	12.0%	35	0.0%	0	0.0%	0	0.0%	0
RH116	1.2%	12	0.0%	0	0.0%	0	0.0%	0	4.0%	12	0.0%	0	0.0%	0	0.0%	0
RH117	2.7%	27	0.0%	0	0.0%	0	0.0%	0	9.3%	27	0.0%	0	0.0%	0	0.0%	0
RH118	5.1%	51	0.0%	0	0.0%	0	0.0%	0	17.3%	51	0.0%	0	0.0%	0	0.0%	0
RH119	3.1%	31	0.0%	0	0.0%	0	0.0%	0	10.7%	31	0.0%	0	0.0%	0	0.0%	0
RH121	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH122	2.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH123	1.6%	16	0.0%	0	0.0%	0	18.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH124	3.4%	34	0.0%	0	0.0%	0	38.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH125	3.9%	39	0.0%	0	0.0%	0	43.7%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH130	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.6%	16
RH135	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH136	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH138	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH139	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	63.4%	28
RH140	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	17	0.0%	0	0.0%	0
RH149	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	27	0.0%	0
RH175	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH176	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH2 8	2.8%	28	22.2%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH201	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH202	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH203	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH204	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH3 7	0.3%	3	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 1	2.4%	24	19.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 2	1.0%	10	8.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 3	1.6%	16	12.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 4	3.7%	37	29.2%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 5	1.9%	19	0.0%	0	31.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 6	0.5%	5	4.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH6 0	0.8%	8	0.0%	0	0.0%	0	0.0%	0	2.7%	8	0.0%	0	0.0%	0	0.0%	0
RH6 7	2.7%	27	0.0%	0	0.0%	0	0.0%	0	9.3%	27	0.0%	0	0.0%	0	0.0%	0
RH6 8	4.3%	43	0.0%	0	0.0%	0	0.0%	0	14.7%	43	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1000		125		60		89		293		17		27		44
Sample:		1000		72		71		71		75		71		71		71

Column %ges.

Q01 In which shop or shopping centre do you do most of your household's main food shopping?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' and '(Don't do)' at Q01)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Tesco Extra, Horsham Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	14.5%	133	19.1%	18	1.5%	1	28.3%	5	1.6%	1	17.7%	6	4.5%	2	0.0%	0
Sainsbury, 7 Worthing Road, Horsham, RH12 1SQ	12.3%	113	52.9%	50	6.1%	2	53.3%	9	0.0%	0	11.3%	4	4.5%	2	0.0%	0
Tesco Extra, Gatwick Extra, Reigate Road, Hookwood, Horley, RH6 0AT	8.9%	82	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Crawley Avenue, West Green, Crawley, RH10 2NF	7.8%	72	0.0%	0	7.6%	3	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crawley Hazelwick Extra, Hazelwick Avenue, Crawley, RH10 1GY	7.5%	69	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pegler Way, Crawley, RH11 7AH	5.7%	52	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham, RH12 1EH	3.1%	29	19.1%	18	0.0%	0	3.3%	1	0.0%	0	3.2%	1	3.0%	1	0.0%	0
Tesco, 18 London Road, Pulborough, RH20 1AS	2.9%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.5%	5	48.5%	17	3.0%	2
Sainsbury, 32-38 High Street, Dorking, RH4 1AY	2.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Local Shops	2.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Shoreham EXTRA, Holmbush Farm, Upper Shoreham Road, Shoreham by Sea, BN43 6TD	2.3%	21	0.0%	0	0.0%	0	0.0%	0	40.3%	19	4.8%	2	0.0%	0	0.0%	0
Sainsbury, Stane Street, Codmore Hill, Pulborough, RH10 1BQ	2.2%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3	22.7%	8	3.0%	2
Sainsbury, Bannister Way, Haywards Heath	1.8%	16	0.0%	0	47.0%	16	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Downlands Business Park, Lyons Farm, Worthing, BN14 9LA	1.7%	16	0.0%	0	0.0%	0	0.0%	0	3.2%	2	4.8%	2	0.0%	0	22.7%	12
Waitrose, 48-52 South Street, Dorking, RH4 2HQ	1.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 26 Victoria Road, Horley, RH6 7PZ	1.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 182 Littlehampton Road, Durrington. Worthing, BN13 1QY	1.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.2%	13
Sainsbury, Stocklund Square, 146-158 High Street, Cranleigh, GU6 8RF	1.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.1%	10	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.5%	1	0.0%	0
Sainsbury's Central, 37-43 Queensway, Crawley, RH10 1EG	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Local Shops	1.0%	9	0.0%	0	1.5%	1	0.0%	0	17.7%	8	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 5 Peterhouse Parade, Pound Hill, Crawley, RH10 3BA	0.9%	8	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, New Road, West Durrington, Worthing, BN13 3PB	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	7
Tesco, Hammonds Farm, Burgess Hill	0.6%	6	0.0%	0	9.1%	3	3.3%	1	4.8%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Worthing, BN11 1LL	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.6%	1	3.2%	1	0.0%	0	6.1%	3
Sainsbury, Clay Lane, Burpham, Guildford, GU4 7JU	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Market Town, Village Way, Cranleigh, GU6 8AF	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Pulborough	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.5%	1	0.0%	0

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Road, Storrington, Pulborough, RH20 4HG																
Marks & Spencer, Unit 19/20, Swan Walk, Horsham, RH12 1YX	0.5%	4	2.9%	3	1.5%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Somerfield, 12-13 Old Mill Lane, Storrington, Pulborough, RH20 4NQ	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	3	1.5%	1	0.0%	0
Crawley Local Shops	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Via Ravenna, Chichester	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	2	3.0%	2
Budgens, High Street, Billingshurst, RH14 9NY	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 21 St. Martins Walk, Dorking, RH4 1UX	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	3	0.0%	0	0.0%	0
Sainsbury, New Road, Rustington	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	3
Tesco Express, Redkiln Way, Horsham, RH13 5QH	0.3%	3	1.5%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Old Shoreham Road, Hove	0.3%	3	0.0%	0	0.0%	0	0.0%	0	4.8%	2	1.6%	1	0.0%	0	0.0%	0
Burgess Hill Local Shops	0.3%	3	0.0%	0	6.1%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Westhampnett Road, Chichester	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	1.5%	1
Sainsbury, Woolsack Way, Godalming	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer Simply Food, 94 High Street, Cranleigh, GU6 8AJ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, 1 Crowhurst Road, Hollingbury, Brighton, BN1 8AS	0.3%	2	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 84-86 Downland Drive, Crawley, RH11 8SW	0.2%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea, BN43 6TD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1	3.2%	1	0.0%	0	0.0%	0
Co-operative Food, Southwater Village, Shopping Centre, Southwater, RH13 9LA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, 19-27 High Street, Littlehampton, BN17 5EG	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2
Somerfield, Ham Road, Shoreham-by-Sea, BN43 6PA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bridge Street, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Supermarket Unit Dorsten Square, Bewbush, Crawley, RH11 8XW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashington Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Lidl, 34 North Street, Worthing, BN11 1DU	0.1%	1	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Haywards Heath Local Shops	0.1%	1	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Local Shops	0.1%	1	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 51-59 Montague Street, Worthing, BN11 3BW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Sainsbury’s Local, 100 Brighton Road, Horley, RH6 7JU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Tesco, Broadpiece, Littlehampton, BN17 5RA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Tesco Express, 176-180 Findon Road, Worthing,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
BN14 0EL																
Somerfield, 1 Broadmark Lane, Rustington, Littlehampton, BN16 2NE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Steyning Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Beare Green Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome, High Street, Partridge Green, Horsham, RH13 8HR	0.1%	1	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowfold Local Shops	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 2-2A Broadwater Street, Worthing, BN14 9DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.8%	25	4.4%	4	6.1%	2	1.7%	0	9.7%	5	3.2%	1	1.5%	1	6.1%	3
Weighted base:		918		94		34		16		47		36		34		55
Sample:		909		68		66		60		62		62		66		66

Q02 How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' or '(Don't know / varies)' at Q01)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Car / Van (as driver)	74.5%	665	60.0%	54	75.8%	24	81.4%	13	76.8%	33	66.7%	23	89.2%	30	79.0%	41
Car / van (as passenger)	11.4%	101	4.6%	4	12.9%	4	13.6%	2	7.1%	3	16.7%	6	4.6%	2	11.3%	6
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	2.7%	24	4.6%	4	6.5%	2	3.4%	1	0.0%	0	6.7%	2	0.0%	0	3.2%	2
Train	0.1%	1	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	8.7%	78	29.2%	26	1.6%	1	1.7%	0	14.3%	6	8.3%	3	6.2%	2	4.8%	2
Bicycle	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.1%	10	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Weighted base:		892		90		32		16		43		34		34		51
Sample:		870		65		62		59		56		60		65		62

Q03 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc?
Those who do main food shopping at Q01 (Excluding those who said 'Internet / delivered' or '(Don't know / varies)' at Q01)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Yes - Meeting Friends	1.0%	9	1.5%	1	3.2%	1	1.7%	0	3.6%	2	0.0%	0	1.5%	1	1.6%	1
Yes - Meeting Family	0.6%	6	3.1%	3	1.6%	1	1.7%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Yes - Other non-food shops	26.5%	236	41.5%	37	16.1%	5	35.6%	6	25.0%	11	21.7%	7	29.2%	10	17.7%	9
Yes - Bars / Pubs	0.2%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Restaurants	0.9%	8	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.7%	1	0.0%	0	3.2%	2
Yes - Cafes	4.7%	42	7.7%	7	4.8%	2	6.8%	1	3.6%	2	8.3%	3	3.1%	1	3.2%	2
Yes - Cinemas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Ten Pin Bowling	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Gym / Health and Fitness	1.3%	11	6.2%	6	0.0%	0	1.7%	0	1.8%	1	1.7%	1	3.1%	1	0.0%	0
Yes - Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Swimming	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Markets	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Museums / Art Gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Library	1.3%	11	3.1%	3	1.6%	1	3.4%	1	0.0%	0	1.7%	1	1.5%	1	1.6%	1
Yes - Financial Service (Banks, Building Society)	9.4%	84	13.8%	12	11.3%	4	13.6%	2	3.6%	2	3.3%	1	6.2%	2	8.1%	4
Yes - Personal Service (Hairdressers, Beauty Salon)	1.4%	12	4.6%	4	1.6%	1	1.7%	0	1.8%	1	1.7%	1	7.7%	3	1.6%	1
Yes - Other Service (Travel Agent, Estate Agent)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Yes - Other	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Yes - Other food shops	0.7%	6	1.5%	1	1.6%	1	1.7%	0	3.6%	2	0.0%	0	1.5%	1	0.0%	0
Yes - petrol station	1.7%	15	1.5%	1	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0	3.2%	2
Yes - church	0.2%	2	0.0%	0	3.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Yes - school run	0.4%	4	1.5%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - work	0.3%	2	0.0%	0	0.0%	0	1.7%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Yes - recycling	0.2%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
No	58.9%	525	38.5%	35	59.7%	19	50.8%	8	50.0%	21	63.3%	22	55.4%	19	74.2%	38
(Don't know / varies)	2.4%	21	3.1%	3	4.8%	2	1.7%	0	7.1%	3	3.3%	1	6.2%	2	0.0%	0
Weighted base:		892		90		32		16		43		34		34		51
Sample:		870		65		62		59		56		60		65		62

Column %ges.

Q04 Where do you do most of your household's small scale 'top-up' food shopping? (i.e. to buy bread, milk, etc, on a day-to-day basis)
Those who do small scale 'top-up' food shopping at Q04 (Excluding those who said 'Internet / delivered' and '(Don't do)' at Q04)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Sainsbury, 7 Worthing Road, Horsham, RH12 1SQ	5.4%	44	25.0%	22	1.6%	1	6.2%	1	1.6%	1	0.0%	0	1.7%	1	0.0%	0
Crawley Local Shops	4.8%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Local Shops	3.2%	26	9.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 48-52 South Street, Dorking, RH4 2HQ	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pegler Way, Crawley, RH11 7AH	3.0%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crawley Hazelwick Extra, Hazelwick Avenue, Crawley, RH10 1GY	2.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Local Shops	2.8%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	2.6%	21	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, 32-38 High Street, Dorking, RH4 1AY	2.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham, RH12 1EH	2.5%	20	14.1%	12	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Henfield Local Shops	2.3%	19	0.0%	0	1.6%	1	7.8%	1	36.1%	17	0.0%	0	0.0%	0	0.0%	0
Other	2.3%	19	0.0%	0	6.6%	2	1.6%	0	1.6%	1	0.0%	0	0.0%	0	3.2%	2
Budgens, High Street, Billingshurst, RH14 9NY	2.2%	18	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Redkiln Way, Horsham, RH13 5QH	2.1%	17	9.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Southwater Village, Shopping Centre, Southwater, RH13 9LA	2.0%	16	0.0%	0	0.0%	0	3.1%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Tesco Extra, Gatwick Extra, Reigate Road, Hookwood, Horley, RH6 0AT	1.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 26 Victoria Road, Horley, RH6 7PZ	1.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Crawley Avenue, West Green, Crawley, RH10 2NF	1.9%	15	1.6%	1	1.6%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Steyning Local Shops	1.8%	14	0.0%	0	0.0%	0	0.0%	0	31.1%	14	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Unit 19/20, Swan Walk, Horsham, RH12 1YX	1.8%	14	10.9%	10	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Local Shops	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.6%	12	1.7%	1	1.6%	1
Tesco Express, 5 Peterhouse Parade, Pound Hill, Crawley, RH10 3BA	1.5%	12	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 73 Brighton Road, Horley, RH6 7HL	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s Central, 37-43 Queensway, Crawley, RH10 1EG	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, 18 London Road, Pulborough, RH20 1AS	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	31.0%	9	0.0%	0
Sainsbury, Stocklund Square, 146-158 High Street, Cranleigh, GU6 8RF	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Local Shops	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Local Shops	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Supermarket Unit Dorsten Square, Bewbush, Crawley, RH11 8XW	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 176-180 Findon Road, Worthing, BN14 0EL	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	8
Co-op Market Town, Village Way, Cranleigh, GU6 8AF	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowfold Local Shops	1.0%	8	3.1%	3	1.6%	1	23.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 50-58 Victoria	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Road, Horley, RH6 7PZ																
Marks & Spencer, 21 St. Martins Walk, Dorking, RH4 1UX	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Pulborough Road, Storrington, Pulborough, RH20 4HG	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	3	6.9%	2	0.0%	0
Pulborough Local Shops	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.1%	7	0.0%	0
Co-operative Food, 3-6 Martletts Corner, Church Street, Rudgwick, Horsham, RH12 3EX	0.8%	7	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Bannister Way, Haywards Heath	0.8%	6	0.0%	0	19.7%	6	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashington Local Shops	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	6	1.7%	1	0.0%	0
Sainsbury, Stane Street, Codmore Hill, Pulborough, RH10 1BQ	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	13.8%	4	0.0%	0
Findon Local Shops	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	6
Ifold Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome, 2-4 Fitzalan Road, Roffey, Horsham, RH13 6AA	0.6%	5	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Local Shops	0.6%	5	0.0%	0	16.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 182 Littlehampton Road, Durrington. Worthing, BN13 1QY	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	5
Southwater Local Shops	0.6%	5	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Durrington Local Shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	8.1%	4
Haywards Heath Local Shops	0.6%	5	0.0%	0	11.5%	4	1.6%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Beare Green Local Shops	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, 12-14 Station Road, Horsham, RH13 5EY	0.5%	4	4.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Downlands Business Park, Lyons Farm, Worthing, BN14 9LA	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	4
Worthing Local Shops	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	4
Amberley	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	4
Billingshurst Local Shops	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Iceland, 3 Broadfield Barton, Broadfield, Crawley, RH11 9BA	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 23 Queensway, Crawley, RH10 1EE	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 35 High Street, Crawley, RH10 1BQ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome, High Street, Partridge Green, Horsham, RH13 8HR	0.5%	4	0.0%	0	0.0%	0	21.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmwood Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capel Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, 12-13 Old Mill Lane, Storrington, Pulborough, RH20 4NQ	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	3	1.7%	1	0.0%	0
Handcross Local Shops	0.4%	3	0.0%	0	9.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Local Shops	0.4%	3	0.0%	0	0.0%	0	0.0%	0	6.6%	3	0.0%	0	0.0%	0	0.0%	0
Balcombe Local Shops	0.3%	3	0.0%	0	8.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer Simply Food, 94 High Street, Cranleigh, GU6 8AJ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, New Road, West Durrington, Worthing, BN13 3PB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2
Tesco Express, 2-4 Lower Station Road, Billingshurst, RH14 9SX	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wisborough Green Local	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Shops																
Westcott Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ewhurst Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Superstore, Newland Street, Broadwater Bridge, Worthing, BN11 1JU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Arundel Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Lidl, 34 North Street, Worthing, BN11 1DU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Loxwood Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Chiltington Local Shops	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	2	0.0%	0
Ardingly Local Shops	0.2%	2	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Local Shops	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Shoreham EXTRA, Holmbush Farm, Upper Shoreham Road, Shoreham by Sea, BN43 6TD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.9%	1	0.0%	0	0.0%	0
Partridge Green Local Shops	0.2%	1	0.0%	0	0.0%	0	7.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, 84-86 Lambs Farm Road, Greenfields Estate, Horsham, RH12 4JH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome, 24 North Parade, Warnham Road, Horsham, RH12 2DH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plaistow Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Worthing, BN11 1LL	0.1%	1	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Ockley Local Shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rectory Road, Salvington, Worthing, BN14 7PE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Sainsbury, New Road, Rustington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Tesco, Hammonds Farm, Burgess Hill	0.1%	1	0.0%	0	1.6%	1	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Brighton Marina Village, Brighton, BN2 5UT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Somerfield, Ham Road, Shoreham-by-Sea, BN43 6PA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury, Old Shoreham Road, Hove	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 7 Sterling Parade, The Street, Rustington, Littlehampton, BN16 3PA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Tesco Express, 84-86 Downland Drive, Crawley, RH11 8SW	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, 1 Crowhurst Road, Hollingbury, Brighton, BN1 8AS	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea, BN43 6TD	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Buck Barn Garage, Horsham, RH13 8LW	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alfold Local Shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.0%	65	17.2%	15	8.2%	3	10.9%	2	13.1%	6	3.8%	1	8.6%	3	6.5%	3
Weighted base:		817		89		31		17		46		30		30		51
Sample:		833		64		61		64		61		53		58		62

Column %ges.

Q05 In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods?

Those who go shopping for clothing and footwear at Q05 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q05)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Crawley Town Centre	32.3%	294	13.2%	12	38.1%	12	13.8%	2	6.5%	3	4.8%	2	12.1%	4	1.4%	1
Horsham Town Centre	28.2%	258	63.2%	60	14.3%	5	60.0%	10	16.1%	8	20.6%	7	25.8%	9	1.4%	1
Guildford City Centre	8.3%	76	4.4%	4	0.0%	0	0.0%	0	1.6%	1	1.6%	1	4.5%	2	0.0%	0
Worthing Town Centre	7.3%	66	0.0%	0	0.0%	0	6.2%	1	21.0%	10	44.4%	16	10.6%	4	56.5%	32
Brighton City Centre	3.9%	35	0.0%	0	7.9%	3	4.6%	1	32.3%	15	4.8%	2	1.5%	1	8.7%	5
Chichester Town Centre	3.2%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	4	31.8%	11	21.7%	12
Central London	2.4%	22	7.4%	7	6.3%	2	3.1%	1	0.0%	0	0.0%	0	1.5%	1	1.4%	1
Reigate Town Centre	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.1%	10	0.0%	0	1.6%	1	1.5%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0
Redhill Town Centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.0%	9	1.5%	1	3.2%	1	3.1%	1	4.8%	2	3.2%	1	1.5%	1	2.9%	2
Horley Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.8%	7	1.5%	1	1.6%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Dorking Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	0.6%	6	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.6%	6	0.0%	0	17.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.6%	6	0.0%	0	0.0%	0	1.5%	0	4.8%	2	4.8%	2	1.5%	1	1.4%	1
Croydon Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Portsmouth City Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.2%	2	0.0%	0	3.2%	1	1.5%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.2%	2	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	1.5%	1	1.4%	1
Storrington Town Centre	0.1%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0	1.6%	1	1.5%	1	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.5%	1	0.0%	0
Cranleigh Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	4.0%	36	8.8%	8	4.8%	2	0.0%	0	8.1%	4	1.6%	1	1.5%	1	0.0%	0
Weighted base:		912		94		32		17		47		36		34		57
Sample:		909		68		63		65		62		63		66		69

Q06 How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)?
Those who go shopping for clothing and footwear at Q05 (Excluding '(Don't know / varies / no pattern)' at Q05)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Car / Van (as driver)	61.2%	577	43.9%	40	71.9%	24	73.2%	14	77.1%	36	65.2%	26	81.2%	29	60.0%	35
Car / van (as passenger)	7.9%	75	3.0%	3	3.1%	1	4.2%	1	6.6%	3	8.7%	3	5.8%	2	8.6%	5
Motorcycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.4%	1	0.0%	0	0.0%	0
Bus	10.5%	99	3.0%	3	12.5%	4	8.5%	2	8.2%	4	14.5%	6	2.9%	1	25.7%	15
Train	3.4%	32	6.1%	6	6.3%	2	2.8%	1	0.0%	0	0.0%	0	4.3%	2	2.9%	2
Taxi	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	6.3%	60	36.4%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.8%	8	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	19	0.0%	0	1.6%	1	2.8%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
(Don't travel / goods delivered)	6.9%	65	6.1%	6	4.7%	2	8.5%	2	6.6%	3	10.1%	4	5.8%	2	1.4%	1
Weighted base:		943		91		33		19		46		40		36		58
Sample:		944		66		64		71		61		69		69		70

Column %ges.

Q07 Where else do you shop for your household's clothing, footwear and other fashion goods?
Those who go shopping for clothing and footwear at Q05 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Nowhere else)' at Q07)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Crawley Town Centre	24.6%	161	40.8%	28	14.3%	4	29.8%	5	5.3%	2	5.4%	2	11.7%	4	2.1%	1
Horsham Town Centre	17.8%	116	18.4%	12	16.3%	4	17.5%	3	21.1%	6	32.1%	10	18.3%	6	6.4%	2
Brighton City Centre	10.0%	65	6.1%	4	38.8%	10	15.8%	2	26.3%	8	8.9%	3	5.0%	2	17.0%	7
Guildford City Centre	9.1%	59	2.0%	1	2.0%	1	10.5%	2	2.6%	1	7.1%	2	11.7%	4	0.0%	0
Worthing Town Centre	4.7%	31	0.0%	0	0.0%	0	8.8%	1	21.1%	6	16.1%	5	21.7%	7	21.3%	8
Croydon Town Centre	3.6%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Town Centre	3.4%	22	2.0%	1	2.0%	1	7.0%	1	0.0%	0	12.5%	4	13.3%	4	19.1%	7
Redhill Town Centre	3.2%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.5%	16	2.0%	1	6.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	6.4%	2
Central London	2.3%	15	0.0%	0	4.1%	1	1.8%	0	0.0%	0	3.6%	1	1.7%	1	2.1%	1
Bluewater Shopping Centre, Kent	2.2%	15	2.0%	1	2.0%	1	0.0%	0	2.6%	1	1.8%	1	0.0%	0	2.1%	1
Kingston upon Thames Town Centre	2.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Dorking Town Centre	1.4%	9	4.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.2%	8	2.0%	1	4.1%	1	1.8%	0	0.0%	0	0.0%	0	3.3%	1	6.4%	2
Reigate Town Centre	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.5%	4	2.0%	1	0.0%	0	3.5%	1	2.6%	1	0.0%	0	0.0%	0	2.1%	1
Portsmouth City Centre	0.3%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Cranleigh Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.3%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Camberley Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	0.2%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	1.8%	1	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.2%	1	0.0%	0	2.0%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.7%	1	0.0%	0
Findon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Haywards Heath Town Centre	0.1%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	7.0%	46	12.2%	8	6.1%	2	1.8%	0	7.9%	2	7.1%	2	3.3%	1	10.6%	4
Weighted base:		654		68		25		15		29		32		31		39
Sample:		688		49		49		57		38		56		60		47

Column %ges.

Q08 Where do you do most of your households shopping for furniture, floor coverings and household textiles?
Those who go shopping for furniture, floor coverings and household textiles at Q08 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q08)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Crawley Town Centre	20.8%	153	11.9%	10	12.2%	3	8.0%	1	2.1%	1	0.0%	0	5.2%	2	0.0%	0
Horsham Town Centre	17.0%	125	37.3%	30	4.1%	1	34.0%	5	8.5%	3	9.8%	2	22.4%	7	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	9.2%	67	6.8%	6	6.1%	2	10.0%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Worthing Town Centre	4.8%	35	0.0%	0	0.0%	0	4.0%	1	12.8%	5	24.4%	6	6.9%	2	48.2%	22
Guildford City Centre	4.5%	33	1.7%	1	0.0%	0	0.0%	0	6.4%	2	2.4%	1	6.9%	2	0.0%	0
Croydon Town Centre	3.8%	28	1.7%	1	4.1%	1	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	3.7%	27	13.6%	11	0.0%	0	10.0%	1	0.0%	0	7.3%	2	3.4%	1	0.0%	0
Horley Town Centre	3.6%	26	0.0%	0	2.0%	1	0.0%	0	2.1%	1	2.4%	1	0.0%	0	1.8%	1
Brighton City Centre	2.2%	16	3.4%	3	18.4%	5	12.0%	2	10.6%	4	0.0%	0	1.7%	1	3.6%	2
Other	1.9%	14	0.0%	0	8.2%	2	2.0%	0	6.4%	2	9.8%	2	3.4%	1	1.8%	1
Chichester Town Centre	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	13.8%	4	14.3%	7
Homebase, Crawley Avenue, Crawley, RH10 2N	1.7%	12	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	1.5%	11	0.0%	0	2.0%	1	0.0%	0	0.0%	0	2.4%	1	0.0%	0	1.8%	1
Central London	1.4%	11	1.7%	1	10.2%	3	2.0%	0	0.0%	0	0.0%	0	3.4%	1	1.8%	1
Ikea, Valley Park, Purley Way, Croydon	1.2%	9	3.4%	3	2.0%	1	2.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Cranleigh Town Centre	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.7%	5	0.0%	0	2.0%	1	2.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	3.4%	1	5.4%	2
Dorking Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holmbush Farm	0.6%	4	1.7%	1	0.0%	0	0.0%	0	6.4%	2	2.4%	1	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.5%	4	0.0%	0	14.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hove Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2	1.8%	1
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	2	0.0%	0	1.8%	1
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	5.4%	2
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Southampton City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	1.8%	1
Redhill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, London Road, Reigate, RH2 0QS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Burgess Hill Town Centre	0.2%	2	0.0%	0	2.0%	1	2.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Wickes, Vincent Lane, Dorking, RH4 3HQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpetright, Haslett Avenue, Crawley, RH10 1N	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Bognor Regis Town Centre	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	11.5%	85	16.9%	14	12.2%	3	8.0%	1	23.4%	8	17.1%	4	13.8%	4	7.1%	3
Weighted base:		736		82		25		13		36		24		30		46
Sample:		715		59		49		50		47		41		58		56

Q09 Where do you do most of your households shopping for DIY and decorating goods?
Those who go shopping for DIY and decorating goods at Q09 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q09)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	23.4%	206	68.8%	61	0.0%	0	75.8%	13	5.0%	2	19.4%	7	33.3%	11	0.0%	0
Crawley Town Centre	16.2%	142	1.6%	1	29.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	7.2%	63	23.4%	21	7.0%	2	9.7%	2	6.7%	3	4.8%	2	1.6%	1	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	5.6%	49	0.0%	0	3.5%	1	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	3.9%	34	0.0%	0	0.0%	0	0.0%	0	1.7%	1	12.9%	5	4.8%	2	50.8%	27
Homebase, Crawley Avenue, Crawley, RH10 2N	3.9%	34	1.6%	1	1.8%	1	0.0%	0	1.7%	1	0.0%	0	1.6%	1	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	3.8%	34	0.0%	0	8.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Town Centre	3.0%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	2.6%	23	0.0%	0	0.0%	0	0.0%	0	8.3%	4	19.4%	7	0.0%	0	23.1%	12
Wickes, Vincent Lane, Dorking, RH4 3HQ	2.3%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	2.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, London Road, Reigate, RH2 0QS	1.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	1.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	1.2%	11	0.0%	0	0.0%	0	0.0%	0	20.0%	9	3.2%	1	1.6%	1	0.0%	0
Cranleigh Town Centre	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	1.0%	9	0.0%	0	0.0%	0	1.6%	0	0.0%	0	1.6%	1	1.6%	1	0.0%	0
Burgess Hill Town Centre	0.9%	8	0.0%	0	26.3%	8	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Discovery Park, Chichester, PO19 6U	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	12.7%	4	4.6%	2
Holmbush Farm	0.9%	8	0.0%	0	0.0%	0	0.0%	0	16.7%	8	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Kingston Road, Leatherhead	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.7%	7	0.0%	0	1.8%	1	0.0%	0	3.3%	2	3.2%	1	1.6%	1	0.0%	0
Billingshurst Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Storrington Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	4	3.2%	1	1.5%	1
B&Q, Brighton Road, Shoreham-by-Sea	0.7%	6	0.0%	0	0.0%	0	3.2%	1	8.3%	4	1.6%	1	0.0%	0	1.5%	1
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.5%	4	0.0%	0	0.0%	0	0.0%	0	5.0%	2	1.6%	1	1.6%	1	1.5%	1
Wickes, Dominion road, Worthing, BN14 8J	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.6%	1	4.6%	2
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	2	0.0%	0
Chichester Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.6%	1	3.1%	2
B&Q, Woodbridge Road, Guildford, GU1 1AJ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Godalming Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.3%	3	0.0%	0	0.0%	0	1.6%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2	1.6%	1	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	1.5%	1
Haywards Heath Town Centre	0.2%	2	0.0%	0	3.5%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	0.2%	2	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Foundry Retail Park, Horsham, RH13 5P (Dreams)	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rustington Retail Park, Barn Nursery, Rustingon, Littlehampton, BN16 3R (Focus, Halfords, Pets at Home)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.5%	1
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.5%	1
Brighton Retail Park, Carden Avenue, Hollingbury, Brighton, BN1 8LW (Argos Extra, Next)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Central London	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Bluewater Shopping Centre, Kent	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Red Square Retail Park, Upper Brighton Road, Worthing, BN14 9E (Argos, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Carpetright, Haslett Avenue, Crawley, RH10 1N	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	5.9%	52	1.6%	1	12.3%	4	3.2%	1	11.7%	5	9.7%	3	12.7%	4	1.5%	1
Weighted base:		877		89		29		17		46		36		33		54
Sample:		875		64		57		62		60		62		63		65

Q10 Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles?
Those who go shopping for domestic appliances such as washing machines, fridges cookers and kettles at Q10 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q10

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	23.0%	172	3.4%	3	12.2%	3	1.9%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	19.5%	145	67.8%	55	6.1%	2	32.7%	5	6.7%	2	15.2%	4	10.0%	3	0.0%	0
Crawley Town Centre	12.8%	95	3.4%	3	16.3%	4	0.0%	0	4.4%	2	0.0%	0	4.0%	1	0.0%	0
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	5.3%	39	18.6%	15	0.0%	0	30.8%	4	2.2%	1	4.3%	1	0.0%	0	0.0%	0
Worthing Town Centre	4.4%	32	0.0%	0	0.0%	0	1.9%	0	17.8%	6	26.1%	7	4.0%	1	36.8%	17
Dorking Town Centre	4.2%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	2.9%	22	1.7%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	2.2%	16	0.0%	0	0.0%	0	0.0%	0	6.7%	2	13.0%	3	0.0%	0	22.8%	11
Pulborough Town Centre	1.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.2%	4	24.0%	6	7.0%	3
Other	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2
Guildford City Centre	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	1.6%	12	0.0%	0	0.0%	0	13.5%	2	4.4%	2	2.2%	1	8.0%	2	0.0%	0
Kingston upon Thames Town Centre	1.0%	7	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.9%	7	0.0%	0	16.3%	4	3.8%	1	6.7%	2	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.9%	7	0.0%	0	24.5%	6	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Bramley Village	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	8.0%	2	3.5%	2
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	10.0%	3	1.8%	1
Findon Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	4
Cranleigh Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	3	2.0%	1	0.0%	0
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.5%	3	0.0%	0	0.0%	0	0.0%	0	6.7%	2	2.2%	1	2.0%	1	0.0%	0
Steyning Town Centre	0.4%	3	0.0%	0	0.0%	0	1.9%	0	8.9%	3	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.4%	3	0.0%	0	0.0%	0	1.9%	0	8.9%	3	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.2%	2	0.0%	0	2.0%	1	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	2	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Hove Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0
Croydon Town Centre	0.2%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	2.0%	1	0.0%	0
Foundry Retail Park, Horsham, RH13 5P (Dreams)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0
Bluewater Shopping Centre, Kent	0.1%	1	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Red Square Retail Park, Upper Brighton Road, Worthing, BN14 9E (Argos, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Southwater Town Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	7.0%	52	3.4%	3	12.2%	3	7.7%	1	17.8%	6	2.2%	1	14.0%	4	10.5%	5
Weighted base:		744		82		25		14		34		26		26		47
Sample:		727		59		49		52		45		46		50		57

Column %ges.

Q11 Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment?
Those who go shopping for TV, Hi-Fi, Radio, photographic and computer equipment at Q11 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' at Q11)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	24.1%	176	9.6%	7	11.8%	3	3.9%	1	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	17.7%	129	57.7%	42	5.9%	2	31.4%	4	4.3%	2	14.9%	4	17.0%	4	0.0%	0
Crawley Town Centre	15.5%	114	7.7%	6	25.5%	7	2.0%	0	4.3%	2	0.0%	0	6.4%	2	0.0%	0
Worthing Town Centre	4.3%	32	0.0%	0	0.0%	0	2.0%	0	17.4%	6	29.8%	8	4.3%	1	34.5%	16
Tan Bridge Retail Park, Albion Way, RH12 1A (Staples, Currys)	4.1%	30	11.5%	8	2.0%	1	31.4%	4	2.2%	1	6.4%	2	0.0%	0	0.0%	0
Dorking Town Centre	2.9%	21	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	2.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	2.4%	17	0.0%	0	0.0%	0	0.0%	0	6.5%	2	12.8%	3	0.0%	0	25.5%	12
Other	2.0%	14	0.0%	0	2.0%	1	3.9%	1	0.0%	0	0.0%	0	0.0%	0	3.6%	2
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	1.9%	14	3.8%	3	0.0%	0	11.8%	2	2.2%	1	0.0%	0	10.6%	3	0.0%	0
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Brighton City Centre	1.3%	10	0.0%	0	3.9%	1	2.0%	0	21.7%	8	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	1.3%	9	1.9%	1	0.0%	0	0.0%	0	0.0%	0	10.6%	3	17.0%	4	1.8%	1
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	10.6%	3	7.3%	3
Haywards Heath Town Centre	0.9%	7	0.0%	0	25.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.9%	7	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.5%	4	0.0%	0	2.0%	1	0.0%	0	2.2%	1	2.1%	1	0.0%	0	1.8%	1
Horley Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramley Village	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.5%	4	0.0%	0	7.8%	2	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Findon Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	3
Chichester Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	6.4%	2	1.8%	1
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	2	0.0%	0	1.8%	1
London Road Retail Park, Crawley, RH10 8J (Carpetright, B&Q)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hove Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	1.8%	1
Downlands Retail Park, Upper Brighton Road, Worthing (B&Q Warehouse, Halfords, Paul Simon, Currys)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	2.1%	1	0.0%	0
Cranleigh Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.2%	2	0.0%	0	3.9%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Bluewater Shopping Centre, Kent	0.2%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Foundry Retail Park, Horsham, RH13 5P	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
(Dreams)																
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Arun Retail Park, Broad Piece / Bridge Road, Littlehampton, BN17 5R (Wickes, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Southampton City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Holmbush Farm	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	8.1%	59	3.8%	3	7.8%	2	7.8%	1	19.6%	7	6.4%	2	10.6%	3	9.1%	4
Weighted base:		730		72		26		14		35		27		24		46
Sample:		710		52		51		51		46		47		47		55

Column %ges.

Q12 Where do you do most of your households shopping on personal / luxury goods including books, jewellery, china, glass and cosmetics?

Those who go shopping for personal / luxury goods including books, jewellery, china, glass and cosmetics at Q12 (Excluding those who said 'Internet / catalogue / mail order / TV shopping', 'Abroad' and '(Don't do / don't regularly buy these goods)' a

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Horsham Town Centre	30.6%	225	80.7%	64	15.6%	4	77.8%	11	12.2%	5	36.7%	10	25.4%	8	4.3%	2
Crawley Town Centre	26.8%	197	3.5%	3	20.0%	5	1.9%	0	4.1%	2	2.0%	1	10.2%	3	0.0%	0
Worthing Town Centre	6.2%	46	0.0%	0	0.0%	0	5.6%	1	22.4%	8	34.7%	10	11.9%	4	59.6%	23
Guildford City Centre	6.0%	44	1.8%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	5.1%	2	0.0%	0
Dorking Town Centre	3.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	3.4%	25	1.8%	1	6.7%	2	5.6%	1	28.6%	11	8.2%	2	1.7%	1	2.1%	1
Chichester Town Centre	2.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	25.4%	8	19.1%	7
Reigate Town Centre	2.4%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	1.0%	7	0.0%	0	31.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.8%	6	0.0%	0	2.2%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Central London	0.8%	6	1.8%	1	6.7%	2	1.9%	0	0.0%	0	0.0%	0	1.7%	1	2.1%	1
Croydon Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, London Road, Crawley, RH11 7X (Comet, Paul Simon, Next, Hobbycraft, Harveys, Allied Carpets, Staples, Currys, PC World, Halfords)	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston upon Thames Town Centre	0.6%	4	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Bluewater Shopping Centre, Kent	0.6%	4	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	8.2%	3	0.0%	0	0.0%	0	0.0%	0
Billingshurst Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	2	1.7%	1	0.0%	0
Shoreham-by-Sea Town Centre	0.3%	2	0.0%	0	2.2%	1	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Southampton City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	2.1%	1
Broadbridge Heath Retail Park, Farthing Hill, Horsham, RH12 3J (Homebase, Carpetright, Halfords)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	0.2%	2	0.0%	0	2.2%	1	1.9%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pulborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Henfield Town Centre	0.1%	1	0.0%	0	0.0%	0	1.9%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Ikea, Valley Park, Purley Way, Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Retail Park, Portfield Way, Chichester, PO19 7Y (Halfords, Carpetright, Pets at Home, Harveys, PC World, Currys, Paul Simon, Allied Carpets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Lyons Farm Retail Park, Upper Brighton Road, Worthing, BN14 9L (Boots, Brantano, Currys)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Ladymead Retail Park, Europa Park Road, Guildford, GU1 1AJ (Homebase, Furniture Village, Carpetright, Sports Direct, Halfords, Comet)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Bognor Regis Retail Park, Shripney Road, Bognor Regis, PO22 9T (Matalan, Ponden Home, Dreams, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0

Column %ges.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
(Don't know / varies / no pattern)	7.3%	54	10.5%	8	8.9%	2	3.7%	1	12.2%	5	6.1%	2	6.8%	2	4.3%	2
Weighted base:		737		79		23		14		37		28		31		39
Sample:		747		57		45		54		49		49		59		47

Q13 How often do you visit Horsham Town Centre?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Everyday	3.6%	36	22.2%	22	0.0%	0	1.4%	0	1.4%	1	2.8%	1	0.0%	0	0.0%	0
2 – 3 times a week	8.6%	86	41.7%	42	4.2%	2	11.3%	2	0.0%	0	4.2%	2	5.6%	2	0.0%	0
Once a week	13.9%	139	29.2%	29	2.8%	1	39.4%	7	4.2%	2	9.9%	4	11.3%	4	1.4%	1
Once a fortnight	11.6%	116	6.9%	7	12.7%	5	22.5%	4	8.5%	5	16.9%	7	16.9%	6	1.4%	1
Once a month	10.7%	107	0.0%	0	18.3%	7	11.3%	2	16.9%	9	21.1%	9	16.9%	6	7.0%	4
Once every 3 months	11.9%	119	0.0%	0	14.1%	5	4.2%	1	7.0%	4	12.7%	5	12.7%	5	14.1%	8
Once every 6 months	6.6%	66	0.0%	0	11.3%	4	2.8%	1	5.6%	3	8.5%	3	4.2%	2	8.5%	5
Once a year	4.3%	43	0.0%	0	4.2%	2	2.8%	1	14.1%	8	1.4%	1	8.5%	3	5.6%	3
Less often	2.4%	24	0.0%	0	9.9%	4	1.4%	0	4.2%	2	4.2%	2	2.8%	1	2.8%	2
(Don't know / varies)	0.2%	2	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1
(Never)	26.2%	262	0.0%	0	22.5%	8	1.4%	0	38.0%	21	18.3%	7	19.7%	7	57.7%	34
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

Q14 What do you like about Horsham Town Centre?
Those who visit Horsham Town Centre at Q13

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Close to home	17.3%	128	40.3%	40	3.6%	1	28.6%	5	11.4%	4	19.0%	6	7.0%	2	0.0%	0
Close to work / en route to work	1.8%	13	2.8%	3	0.0%	0	0.0%	0	2.3%	1	5.2%	2	1.8%	1	0.0%	0
Easily accessible by foot / cycle	3.6%	27	12.5%	12	1.8%	1	4.3%	1	2.3%	1	1.7%	1	1.8%	1	3.3%	1
Good and / or free car parking	9.1%	67	5.6%	6	5.5%	2	11.4%	2	22.7%	8	6.9%	2	8.8%	3	6.7%	2
Good bus service / accessible public transport	2.3%	17	1.4%	1	1.8%	1	2.9%	1	6.8%	2	0.0%	0	0.0%	0	6.7%	2
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	4.3%	31	1.4%	1	5.5%	2	2.9%	1	4.5%	2	3.4%	1	0.0%	0	0.0%	0
Good range of chain / well known stores	18.8%	139	15.3%	15	21.8%	6	11.4%	2	13.6%	5	12.1%	4	8.8%	3	30.0%	7
Good range of independent stores	17.6%	130	15.3%	15	20.0%	6	10.0%	2	11.4%	4	6.9%	2	8.8%	3	26.7%	7
Restaurant / cafes	2.9%	22	4.2%	4	0.0%	0	1.4%	0	2.3%	1	5.2%	2	3.5%	1	3.3%	1
Bars / pubs / clubs	0.6%	5	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	1.2%	9	2.8%	3	1.8%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	6.7%	2
Good range of services (bank, library, hairdresser etc.)	1.1%	8	2.8%	3	1.8%	1	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.2%	1	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	32.5%	240	30.6%	30	36.4%	10	20.0%	4	27.3%	9	19.0%	6	22.8%	7	40.0%	10
Cleanliness	3.3%	24	1.4%	1	1.8%	1	5.7%	1	6.8%	2	5.2%	2	1.8%	1	3.3%	1
Safe and secure	2.3%	17	4.2%	4	0.0%	0	2.9%	1	6.8%	2	1.7%	1	0.0%	0	0.0%	0
Indoor shopping malls / arcades	5.7%	42	2.8%	3	1.8%	1	10.0%	2	13.6%	5	5.2%	2	5.3%	2	13.3%	3
Other	1.5%	11	1.4%	1	5.5%	2	1.4%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Compact	10.7%	79	6.9%	7	7.3%	2	12.9%	2	11.4%	4	12.1%	4	10.5%	3	10.0%	2
Flat / even surface	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Friendly people / atmosphere	2.1%	15	1.4%	1	3.6%	1	1.4%	0	2.3%	1	0.0%	0	0.0%	0	6.7%	2
Pedestrianised area	2.4%	18	1.4%	1	9.1%	3	2.9%	1	6.8%	2	3.4%	1	3.5%	1	3.3%	1
Not too crowded	1.0%	7	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Familiar with the area	0.4%	3	1.4%	1	0.0%	0	2.9%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Not too big	1.2%	9	0.0%	0	1.8%	1	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good layout	1.3%	10	0.0%	0	1.8%	1	0.0%	0	2.3%	1	1.7%	1	0.0%	0	0.0%	0
Has a park and ride system	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	6.7%	2
Preference for specific store	0.4%	3	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Old fashioned	1.0%	7	1.4%	1	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	13.5%	100	12.5%	12	12.7%	4	12.9%	2	6.8%	2	22.4%	7	29.8%	9	3.3%	1
(Don't know)	2.0%	15	0.0%	0	5.5%	2	4.3%	1	4.5%	2	1.7%	1	8.8%	3	0.0%	0
Weighted base:		738		100		28		19		33		33		30		25
Sample:		807		72		55		70		44		58		57		30

Q15 What do you dislike about Horsham Town Centre?
Those who visit Horsham Town Centre at Q13

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Difficult to park	9.9%	73	6.9%	7	20.0%	6	10.0%	2	9.1%	3	15.5%	5	10.5%	3	20.0%	5
Difficult to park near shops	1.6%	12	1.4%	1	5.5%	2	4.3%	1	0.0%	0	8.6%	3	5.3%	2	6.7%	2
Too long / inconvenient journey	0.7%	5	0.0%	0	7.3%	2	0.0%	0	0.0%	0	1.7%	1	1.8%	1	6.7%	2
Traffic congestion	0.6%	5	0.0%	0	1.8%	1	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0
Poor bus services	0.8%	6	0.0%	0	0.0%	0	1.4%	0	4.5%	2	1.7%	1	0.0%	0	3.3%	1
Poor accessibility by foot / cycle	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of foodstores	2.4%	18	6.9%	7	3.6%	1	4.3%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Lack of non-food stores	11.8%	87	31.9%	32	10.9%	3	14.3%	3	11.4%	4	10.3%	3	5.3%	2	3.3%	1
Lack of eating and drinking places	1.0%	7	1.4%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.9%	6	0.0%	0	0.0%	0	1.4%	0	2.3%	1	1.7%	1	0.0%	0	0.0%	0
Poor security for shoppers / cars	0.3%	2	1.4%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor lighting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access for disabled	0.4%	3	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Vacant shops	2.8%	21	4.2%	4	5.5%	2	5.7%	1	2.3%	1	3.4%	1	3.5%	1	0.0%	0
Other	3.0%	22	5.6%	6	3.6%	1	4.3%	1	2.3%	1	3.4%	1	7.0%	2	0.0%	0
Expensive parking	5.4%	40	9.7%	10	1.8%	1	7.1%	1	0.0%	0	6.9%	2	1.8%	1	0.0%	0
Too many restaurants / cafes	0.8%	6	2.8%	3	1.8%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The cobbled streets	0.7%	5	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor sculptures / fountains	1.7%	12	5.6%	6	0.0%	0	0.0%	0	2.3%	1	1.7%	1	1.8%	1	0.0%	0
New / improved seating areas	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality shops	0.6%	4	1.4%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Unattractive environment	0.5%	4	1.4%	1	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor layout	0.4%	3	0.0%	0	1.8%	1	0.0%	0	2.3%	1	5.2%	2	0.0%	0	0.0%	0
Too many pound / charity shops	0.4%	3	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	62.1%	458	38.9%	39	45.5%	13	57.1%	11	63.6%	21	56.9%	19	63.2%	19	66.7%	17
(Don't know)	2.1%	15	4.2%	4	3.6%	1	2.9%	1	0.0%	0	3.4%	1	5.3%	2	0.0%	0
Weighted base:		738		100		28		19		33		33		30		25
Sample:		807		72		55		70		44		58		57		30

Q16 What would make you shop in or visit Horsham Town Centre more often?
Those who visit Horsham Town Centre at Q13

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	3.1%	23	1.4%	1	3.6%	1	1.4%	0	6.8%	2	5.2%	2	0.0%	0	10.0%	2
Cheaper parking	7.8%	58	9.7%	10	5.5%	2	12.9%	2	11.4%	4	10.3%	3	8.8%	3	3.3%	1
Cheaper prices	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier / more parking	8.6%	63	5.6%	6	9.1%	3	7.1%	1	9.1%	3	6.9%	2	8.8%	3	10.0%	2
More food stores	1.7%	13	1.4%	1	1.8%	1	1.4%	0	2.3%	1	1.7%	1	0.0%	0	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More non-food stores	10.0%	74	15.3%	15	3.6%	1	11.4%	2	9.1%	3	6.9%	2	8.8%	3	6.7%	2
More department stores	11.6%	85	13.9%	14	14.5%	4	5.7%	1	18.2%	6	6.9%	2	10.5%	3	13.3%	3
More higher order / designer stores	5.6%	41	8.3%	8	3.6%	1	10.0%	2	6.8%	2	0.0%	0	7.0%	2	0.0%	0
More places to eat / drink	0.8%	6	1.4%	1	3.6%	1	1.4%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More specialist/unusual shops	4.3%	32	11.1%	11	1.8%	1	15.7%	3	0.0%	0	3.4%	1	1.8%	1	0.0%	0
More independent shops	3.6%	26	8.3%	8	3.6%	1	11.4%	2	2.3%	1	3.4%	1	5.3%	2	0.0%	0
Other	1.0%	7	2.8%	3	1.8%	1	1.4%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
New / improved public toilets	0.4%	3	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / improved seating areas	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing	53.0%	392	48.6%	48	54.5%	15	48.6%	9	54.5%	18	56.9%	19	63.2%	19	50.0%	12
(Don't know)	3.9%	29	2.8%	3	7.3%	2	2.9%	1	2.3%	1	5.2%	2	3.5%	1	10.0%	2
Weighted base:		738		100		28		19		33		33		30		25
Sample:		807		72		55		70		44		58		57		30

Q17 Do you ever use the Park and Ride to visit Horsham Town Centre?

Those who visit Horsham Town Centre at Q13

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Yes	7.4%	54	1.4%	1	0.0%	0	12.9%	2	11.4%	4	22.4%	7	19.3%	6	26.7%	7
No	3.8%	28	1.4%	1	1.8%	1	7.1%	1	9.1%	3	5.2%	2	10.5%	3	3.3%	1
Never	88.9%	656	97.2%	97	98.2%	28	80.0%	15	79.5%	27	72.4%	24	70.2%	21	70.0%	17
Weighted base:		738		100		28		19		33		33		30		25
Sample:		807		72		55		70		44		58		57		30

Q18 How often do you use the Park and Ride to visit Horsham Town Centre compared to your car usage?

Those who ever use the park and ride to visit Horsham Town Centre at Q17

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
More than I use the car	38.3%	21	0.0%	0	0.0%	0	11.1%	0	20.0%	1	38.5%	3	72.7%	4	87.5%	6
Less than I use the car	40.4%	22	100.0%	1	0.0%	0	66.7%	2	40.0%	2	23.1%	2	18.2%	1	12.5%	1
About the Same	18.2%	10	0.0%	0	0.0%	0	22.2%	1	40.0%	2	23.1%	2	0.0%	0	0.0%	0
I don't have the use of a car	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	1	0.0%	0	0.0%	0
(Don't know)	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	1	0.0%	0
Weighted base:		54		1		0		2		4		7		6		7
Sample:		75		1		0		9		5		13		11		8

Q19 Do you visit Southwater or Billingshurst most often for your shopping or service requirements?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Southwater	8.6%	86	13.9%	14	0.0%	0	32.4%	6	0.0%	0	11.3%	5	2.8%	1	4.2%	2
Billingshurst	8.4%	84	1.4%	1	1.4%	1	5.6%	1	4.2%	2	7.0%	3	36.6%	14	2.8%	2
Neither	82.8%	828	84.7%	85	98.6%	36	62.0%	12	95.8%	52	81.7%	33	60.6%	22	93.0%	55
(Don't know)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

Q20 For what reason or reasons do you visit Southwater shopping centre?

Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Close to home	29.6%	25	0.0%	0	0.0%	0	26.1%	2	0.0%	0	0.0%	0	50.0%	1	0.0%	0
Close to work / en route to work	2.7%	2	0.0%	0	0.0%	0	8.7%	1	0.0%	0	25.0%	1	0.0%	0	0.0%	0
Easily accessible by foot / cycle	5.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	3.6%	3	20.0%	3	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good bus service / accessible public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.3%	0	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	9.9%	9	10.0%	1	0.0%	0	21.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Good range of independent stores	10.0%	9	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Restaurant / cafes	6.1%	5	10.0%	1	0.0%	0	21.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bars / pubs / clubs	1.7%	1	0.0%	0	0.0%	0	4.3%	0	0.0%	0	25.0%	1	0.0%	0	0.0%	0
Leisure facilities	3.4%	3	10.0%	1	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	24.9%	21	50.0%	7	0.0%	0	34.8%	2	0.0%	0	25.0%	1	50.0%	1	0.0%	0
Good prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	6.5%	6	10.0%	1	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Visiting friends / relatives	5.6%	5	0.0%	0	0.0%	0	4.3%	0	0.0%	0	25.0%	1	0.0%	0	33.3%	1
Nothing / very little	6.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.2%	2	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	66.7%	2
Weighted base:		86		14		0		6		0		5		1		2
Sample:		108		10		0		23		0		8		2		3

Q21 How often do you visit Southwater?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Everyday	10.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2 – 3 times a week	16.1%	14	10.0%	1	0.0%	0	21.7%	1	0.0%	0	25.0%	1	0.0%	0	0.0%	0
Once a week	12.6%	11	10.0%	1	0.0%	0	13.0%	1	0.0%	0	0.0%	0	50.0%	1	0.0%	0
Once a fortnight	7.2%	6	10.0%	1	0.0%	0	17.4%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Once a month	23.3%	20	50.0%	7	0.0%	0	26.1%	2	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Once every 3 months	14.3%	12	0.0%	0	0.0%	0	13.0%	1	0.0%	0	25.0%	1	0.0%	0	66.7%	2
Once every 6 months	8.6%	7	10.0%	1	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	33.3%	1
Once a year	4.0%	3	10.0%	1	0.0%	0	4.3%	0	0.0%	0	0.0%	0	50.0%	1	0.0%	0
Less often	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	1	0.0%	0	0.0%	0	4.3%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Weighted base:		86		14		0		6		0		5		1		2
Sample:		108		10		0		23		0		8		2		3

Q22 What do you like about Southwater?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Close to home	15.5%	13	10.0%	1	0.0%	0	21.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to work / en route to work	2.0%	2	0.0%	0	0.0%	0	8.7%	1	0.0%	0	25.0%	1	0.0%	0	0.0%	0
Easily accessible by foot / cycle	0.6%	1	0.0%	0	0.0%	0	8.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	17.3%	15	50.0%	7	0.0%	0	17.4%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	1.0%	1	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	7.3%	6	0.0%	0	0.0%	0	8.7%	1	0.0%	0	0.0%	0	50.0%	1	33.3%	1
Good range of independent stores	11.9%	10	0.0%	0	0.0%	0	13.0%	1	0.0%	0	25.0%	1	50.0%	1	33.3%	1
Restaurant / cafes	6.7%	6	20.0%	3	0.0%	0	17.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bars / pubs / clubs	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Leisure facilities	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	7.6%	7	10.0%	1	0.0%	0	4.3%	0	0.0%	0	0.0%	0	50.0%	1	0.0%	0
Good prices	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	27.9%	24	0.0%	0	0.0%	0	17.4%	1	0.0%	0	50.0%	2	0.0%	0	33.3%	1
Cleanliness	2.5%	2	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	6.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	4.5%	4	10.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	9.4%	8	0.0%	0	0.0%	0	4.3%	0	0.0%	0	25.0%	1	0.0%	0	0.0%	0
Has everything I need	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	16.8%	14	30.0%	4	0.0%	0	8.7%	1	0.0%	0	12.5%	1	0.0%	0	33.3%	1
(Don't know)	3.3%	3	10.0%	1	0.0%	0	4.3%	0	0.0%	0	0.0%	0	50.0%	1	0.0%	0
Weighted base:		86		14		0		6		0		5		1		2
Sample:		108		10		0		23		0		8		2		3

Q23 How do you travel to Southwater?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Car / Van (as driver)	72.7%	62	100.0%	14	0.0%	0	95.7%	6	0.0%	0	75.0%	3	100.0%	1	66.7%	2
Car / van (as passenger)	4.1%	4	0.0%	0	0.0%	0	4.3%	0	0.0%	0	12.5%	1	0.0%	0	33.3%	1
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and Ride	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	18.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		86		14		0		6		0		5		1		2
Sample:		108		10		0		23		0		8		2		3

Q24 What would make you shop in or visit Southwater more often?
Those who visit Southwater most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
Cheaper parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier / more parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More food stores	3.3%	3	10.0%	1	0.0%	0	4.3%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More non-food stores	5.0%	4	20.0%	3	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More department stores	2.2%	2	10.0%	1	0.0%	0	8.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More higher order / designer stores	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More places to eat / drink	5.6%	5	0.0%	0	0.0%	0	4.3%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More specialist/unusual shops	5.7%	5	20.0%	3	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent shops	0.6%	1	0.0%	0	0.0%	0	8.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing	79.0%	68	60.0%	8	0.0%	0	73.9%	5	0.0%	0	62.5%	3	100.0%	1	66.7%	2
(Don't know)	2.7%	2	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	1
Weighted base:		86		14		0		6		0		5		1		2
Sample:		108		10		0		23		0		8		2		3

Q25 For what reason or reasons do you visit Billingshurst shopping centre?
Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Close to home	33.4%	28	0.0%	0	0.0%	0	0.0%	0	66.7%	2	0.0%	0	0.0%	0	0.0%	0
Close to work / en route to work	5.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	15.4%	2	0.0%	0
Easily accessible by foot / cycle	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	8.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Good range of independent stores	20.2%	17	0.0%	0	0.0%	0	25.0%	0	66.7%	2	20.0%	1	26.9%	4	0.0%	0
Restaurant / cafes	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Bars / pubs / clubs	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	3.9%	1	0.0%	0
Leisure facilities	4.2%	4	0.0%	0	0.0%	0	50.0%	1	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Good range of services (bank, library, hairdresser etc.)	27.2%	23	100.0%	1	0.0%	0	25.0%	0	0.0%	0	20.0%	1	30.8%	4	0.0%	0
Good prices	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	4.2%	4	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	1
Recycling facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good food stores	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Visiting friends / relatives	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	3.9%	1	0.0%	0
Buy pet products	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	50.0%	1
Nothing / very little	7.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	7.7%	1	0.0%	0
(Don't know)	2.0%	2	0.0%	0	0.0%	0	25.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Q26 How often do you visit Billingshurst?

Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Everyday	11.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	7.7%	1	0.0%	0
2 – 3 times a week	19.8%	17	0.0%	0	0.0%	0	25.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Once a week	15.0%	13	0.0%	0	0.0%	0	50.0%	1	33.3%	1	0.0%	0	11.5%	2	0.0%	0
Once a fortnight	20.1%	17	0.0%	0	0.0%	0	25.0%	0	0.0%	0	20.0%	1	15.4%	2	100.0%	2
Once a month	14.9%	13	0.0%	0	0.0%	0	0.0%	0	33.3%	1	20.0%	1	26.9%	4	0.0%	0
Once every 3 months	11.6%	10	0.0%	0	0.0%	0	0.0%	0	33.3%	1	20.0%	1	15.4%	2	0.0%	0
Once every 6 months	4.8%	4	100.0%	1	0.0%	0	0.0%	0	0.0%	0	20.0%	1	7.7%	1	0.0%	0
Once a year	0.6%	1	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Q27 What do you like about Billingshurst?

Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Close to home	27.9%	23	0.0%	0	0.0%	0	25.0%	0	33.3%	1	20.0%	1	7.7%	1	0.0%	0
Close to work / en route to work	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Easily accessible by foot / cycle	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	7.7%	1	0.0%	0
Good bus service / accessible public transport	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of chain / well known stores	4.3%	4	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0	11.5%	2	0.0%	0
Good range of independent stores	17.0%	14	0.0%	0	0.0%	0	25.0%	0	33.3%	1	20.0%	1	19.2%	3	50.0%	1
Restaurant / cafes	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bars / pubs / clubs	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Leisure facilities	4.9%	4	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Good range of services (bank, library, hairdresser etc.)	4.9%	4	0.0%	0	0.0%	0	25.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good prices	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	9.6%	8	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Cleanliness	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Indoor shopping malls / arcades	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Friendly people / atmosphere	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing / very little	30.0%	25	0.0%	0	0.0%	0	50.0%	1	0.0%	0	60.0%	2	38.5%	5	50.0%	1
(Don't know)	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Q28 How do you travel to Billingshurst?

Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Car / Van (as driver)	64.1%	54	100.0%	1	100.0%	1	100.0%	1	66.7%	2	80.0%	2	88.5%	12	100.0%	2
Car / van (as passenger)	8.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	1	3.9%	1	0.0%	0
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bus	7.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Train	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Park and Ride	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	18.7%	16	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Column %ges.

Q29 What would make you shop in or visit Billingshurst more often?

Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	14.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.1%	3	0.0%	0
Cheaper prices	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Easier / more parking	13.2%	11	0.0%	0	0.0%	0	25.0%	0	33.3%	1	0.0%	0	15.4%	2	0.0%	0
More food stores	13.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More non-food stores	22.6%	19	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	15.4%	2	0.0%	0
More department stores	7.1%	6	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More higher order / designer stores	4.7%	4	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
More places to eat / drink	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More specialist/unusual shops	12.0%	10	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
More independent shops	9.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Other	1.6%	1	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0	0.0%	0	0.0%	0
Get rid of the wheel clampers	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing	47.4%	40	100.0%	1	0.0%	0	75.0%	1	33.3%	1	100.0%	3	50.0%	7	100.0%	2
(Don't know)	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Q30 Which do you use most often - The Budgens in Billingshurst Town Centre or - The Tesco Express adjacent to Billingshurst train station?

Those who visit Billingshurst most often for your shopping or service requirements at Q19

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Budgens, Billingshurst Town Centre	50.6%	43	0.0%	0	0.0%	0	100.0%	1	66.7%	2	60.0%	2	26.9%	4	50.0%	1
Tesco Express, Billingshurst train station	8.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	2	0.0%	0
Neither	38.1%	32	100.0%	1	100.0%	1	0.0%	0	33.3%	1	40.0%	1	61.5%	8	50.0%	1
(Don't know / varies)	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		84		1		1		1		2		3		14		2
Sample:		182		1		1		4		3		5		26		2

Q31 What town centre do you visit most often for pubs / clubs?

Those who visit pubs / clubs at Q31 (Excluding those who said '(Don't do / visit)' at Q31)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Billingshurst Town Centre	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	6.1%	1	0.0%	0
Bognor Regis Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	3.2%	19	3.7%	3	7.1%	2	4.8%	1	17.8%	6	0.0%	0	3.0%	1	6.9%	2
Broadbridge Heath Town Centre	0.8%	4	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	2.7%	16	5.6%	4	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	6.9%	2
Cranleigh Town Centre	1.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	19.3%	112	0.0%	0	4.8%	1	0.0%	0	2.2%	1	0.0%	0	3.0%	1	0.0%	0
Croydon Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Town Centre	8.1%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	0.7%	4	0.0%	0	16.7%	4	2.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	1.5%	9	0.0%	0	0.0%	0	4.8%	1	24.4%	8	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	21.3%	124	77.8%	58	2.4%	1	16.7%	2	6.7%	2	3.8%	1	3.0%	1	0.0%	0
Kingston upon Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0
Pulborough Town Centre	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	45.5%	8	0.0%	0
Redhill Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	4.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	1.8%	10	0.0%	0	0.0%	0	4.8%	1	0.0%	0	3.8%	1	0.0%	0	0.0%	0
Steyning Town Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	17.8%	6	0.0%	0	0.0%	0	0.0%	0
Storrington Town Centre	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.3%	6	0.0%	0	0.0%	0
Worthing Town Centre	2.3%	13	1.9%	1	0.0%	0	0.0%	0	2.2%	1	7.7%	1	3.0%	1	34.5%	8
Amberley Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2
Ardingly Village	0.5%	3	0.0%	0	9.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Arundel Town Centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	13.8%	3
Ashington Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	2	0.0%	0	0.0%	0
Cowfold Village	0.2%	1	0.0%	0	0.0%	0	11.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Village	0.8%	5	0.0%	0	21.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dial Post Village	0.2%	1	0.0%	0	0.0%	0	9.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ewhurst Village	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross Village	0.3%	2	0.0%	0	7.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	3.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loxwood Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Partridge Green Town Centre	0.3%	2	0.0%	0	0.0%	0	16.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	8.9%	3	0.0%	0	0.0%	0	0.0%	0
Upper Beeding Village	0.5%	3	0.0%	0	0.0%	0	0.0%	0	8.9%	3	0.0%	0	0.0%	0	0.0%	0
Wisborough Green Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	5.1%	30	3.7%	3	11.9%	3	11.9%	1	2.2%	1	11.5%	2	6.1%	1	13.8%	3
(Don't know / varies / no pattern)	10.0%	58	5.6%	4	16.7%	4	16.7%	2	8.9%	3	7.7%	1	24.2%	4	13.8%	3
Weighted base:		581		75		22		11		34		15		17		24
Sample:		553		54		42		42		45		26		33		29

Column %ges.

Q32 What town centre do you visit most often for restaurants/eating out?
Those who visit restaurants/eating out at Q32 (Excluding those who said '(Don’t do / visit)' at Q32)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Billingshurst Town Centre	1.1%	9	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	4.3%	1	0.0%	0
Bognor Regis Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Brighton City Centre	3.0%	25	2.9%	3	12.3%	4	8.8%	1	8.3%	4	3.4%	1	2.2%	1	5.1%	2
Broadbridge Heath Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	3.0%	26	4.3%	4	1.8%	1	1.8%	0	0.0%	0	1.7%	1	2.2%	1	1.7%	1
Chichester Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	6.5%	2	6.8%	3
Cranleigh Town Centre	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	17.4%	148	0.0%	0	3.5%	1	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croydon Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Town Centre	7.7%	65	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford City Centre	1.9%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	1.3%	11	0.0%	0	33.3%	10	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Henfield Town Centre	1.3%	11	0.0%	0	0.0%	0	3.5%	1	23.3%	11	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	22.3%	189	76.8%	73	8.8%	3	26.3%	4	5.0%	2	8.6%	3	10.9%	3	1.7%	1
Kingston upon Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Littlehampton Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	3.4%	1	4.3%	1	0.0%	0
Pulborough Town Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	19.6%	5	0.0%	0
Redhill Town Centre	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	4.6%	39	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southwater Town Centre	1.1%	9	1.4%	1	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	13.3%	6	0.0%	0	2.2%	1	1.7%	1
Storrington Town Centre	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.3%	10	6.5%	2	1.7%	1
Worthing Town Centre	3.1%	27	1.4%	1	0.0%	0	1.8%	0	1.7%	1	12.1%	4	2.2%	1	37.3%	18
Amberley Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	3.4%	2
Arundel Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	2	11.9%	6
Ashington Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	2	0.0%	0	0.0%	0
Bramber Village	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	2.2%	1	1.7%	1
Cowfold Village	0.1%	1	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Village	0.3%	3	0.0%	0	8.8%	3	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dial Post Village	0.1%	1	0.0%	0	0.0%	0	7.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Findon Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	2
Handcross Village	0.2%	2	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	2.3%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loxwood Village	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockley Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Shipley Village	0.1%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	6.7%	3	3.4%	1	0.0%	0	0.0%	0
Upper Beeding Village	0.3%	3	0.0%	0	0.0%	0	0.0%	0	5.0%	2	1.7%	1	0.0%	0	0.0%	0
West Chiltington Village	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	4.3%	1	1.7%	1
Wisborough Green Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	3.1%	27	1.4%	1	3.5%	1	5.3%	1	0.0%	0	3.4%	1	0.0%	0	1.7%	1
(Don’t know / varies / no pattern)	14.6%	124	10.1%	10	21.1%	6	28.1%	4	30.0%	14	13.8%	5	23.9%	6	18.6%	9
Weighted base:		849		96		29		15		46		33		24		49
Sample:		823		69		57		57		60		58		46		59

Q33 Where do you go most often to visit the cinema?
Those who visit the cinema at Q33 (Excluding those who said '(Don't do / visit)' at Q33)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Cineworld, 1 London Road, Crawley, West Sussex, RH10 2LR?	54.2%	343	40.0%	28	62.5%	13	64.1%	7	31.7%	10	26.9%	4	29.4%	5	3.4%	1
The Hawth Theatre & Conference Complex, Hawth Avenue, Crawley, RH10 6YZ	3.4%	22	2.0%	1	15.0%	3	7.7%	1	2.4%	1	11.5%	2	2.9%	1	3.4%	1
The Harlequin Theatre and Cinema, Warwick Quadrant, London Road, Redhill, RH1 1NN?	0.5%	3	0.0%	0	2.5%	1	2.6%	0	4.9%	2	0.0%	0	0.0%	0	3.4%	1
The Orion Cinema, Cyprus Road, Burgess Hill, West Sussex, RH15 8DX?	0.2%	2	0.0%	0	7.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Screen, Bancroft Road, Reigate, RH2 7RP?	4.9%	31	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capitol Cinema, Horsham, North Street, Horsham, RH12 1RG	14.3%	91	56.0%	39	0.0%	0	15.4%	2	12.2%	4	11.5%	2	20.6%	4	0.0%	0
Windmill Entertainment Centre, Littlehampton, BN17 5LH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
King Street Picturehouse, East Grinstead, RH19 3DJ	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dome Cinema, Worthing, BN11 3PT	1.2%	7	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	24.1%	6
Central London	0.4%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Cinema, New Park Centre, New Park Road, Chichester	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	2.9%	1	3.4%	1
Cineworld, Brighton Marina Village, Brighton	1.7%	11	0.0%	0	5.0%	1	0.0%	0	26.8%	8	7.7%	1	2.9%	1	0.0%	0
Cineworld, Chichester Gate, Chichester	3.0%	19	0.0%	0	0.0%	0	2.6%	0	0.0%	0	23.1%	3	29.4%	5	37.9%	9
Dorking Halls, Reigate Road, Dorking	3.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Bedford Road, Guildford	4.8%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Kingswest, West Street, Brighton	0.3%	2	0.0%	0	0.0%	0	5.1%	1	4.9%	2	0.0%	0	0.0%	0	0.0%	0
Other	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	3.4%	1
(Don't know / varies / no pattern)	5.9%	38	0.0%	0	5.0%	1	2.6%	0	12.2%	4	15.4%	2	8.8%	2	17.2%	4
Weighted base:		634		69		20		10		31		15		18		24
Sample:		584		50		40		39		41		26		34		29

Column %ges.

Q34 Where do you go most often to go ten pin bowling?
Those who go ten pin bowling at Q34 (Excluding those who said '(Don't do / visit)' at Q34)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
The Big Apple Superbowl, Horsham Leisure Park, Albion Way, Horsham, West Sussex, RH12 1AH	23.8%	97	70.0%	29	0.0%	0	47.6%	3	11.1%	2	46.2%	3	37.5%	3	0.0%	0
AMF Worthing Bowl, Marine Parade, Town Centre, Worthing, BN11 3QJ?	4.3%	17	0.0%	0	5.0%	1	4.8%	0	33.3%	7	15.4%	1	0.0%	0	88.9%	7
Hollywood Bowl, Crawley Leisure Park, London Road, Crawley, RH10 8LR?	61.8%	252	30.0%	12	90.0%	9	33.3%	2	11.1%	2	30.8%	2	31.3%	3	0.0%	0
Bowlplex, Marina Way, Brighton Marina, Brighton	3.6%	15	0.0%	0	0.0%	0	9.5%	1	44.4%	9	7.7%	1	6.3%	1	0.0%	0
Lakeside Superbowl, Terminus Road, Chichester Gate Leisure Park, Chichester, WEST SUSSEX PO19 8EL	0.9%	4	0.0%	0	0.0%	0	4.8%	0	0.0%	0	0.0%	0	18.8%	2	11.1%	1
Guildford Spectrum	3.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	1.9%	8	0.0%	0	5.0%	1	0.0%	0	0.0%	0	0.0%	0	6.3%	1	0.0%	0
Weighted base:		409		42		10		6		21		7		8		7
Sample:		325		30		20		21		27		13		16		9

Q35 Where do you go most often to go to bingo?
Those who go to bingo at Q35 (Excluding those who said 'Internet / online' and '(Don't do / visit)' at Q35)

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Gala Bingo, Kingsgate, Queensway, Town Centre, Crawley, RH10 1EN	79.1%	37	0.0%	0	0.0%	0	33.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Worthing, BN11 3JS	10.3%	5	0.0%	0	0.0%	0	0.0%	0	99.9%	1	66.6%	1	80.0%	2	100.0%	1
Crown Bingo, Bognor Regis, PO21 1PT	0.6%	0	0.0%	0	0.0%	0	33.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Freshfield Way, Brighton	4.3%	2	0.0%	0	100.0%	1	33.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	1	20.0%	1	0.0%	0
Internet / online	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		47		0		1		1		1		2		3		1
Sample:		31		0		1		3		1		3		5		1

Q36 Are there any leisure facilities that you think are lacking within a reasonable distance of your home?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
No	76.7%	767	81.9%	82	78.9%	29	74.6%	14	70.4%	38	77.5%	32	76.1%	28	76.1%	45
Yes, bingo	0.4%	4	1.4%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Yes, bowling	1.3%	13	0.0%	0	1.4%	1	0.0%	0	5.6%	3	2.8%	1	0.0%	0	0.0%	0
Yes, cinema	2.0%	20	0.0%	0	2.8%	1	0.0%	0	5.6%	3	4.2%	2	1.4%	1	4.2%	2
Yes, leisure/ fitness centre	4.8%	48	1.4%	1	1.4%	1	7.0%	1	5.6%	3	5.6%	2	14.1%	5	1.4%	1
Yes, pubs/ clubs/ bars	1.3%	13	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	2.8%	1	1.4%	1
Yes, restaurants/ cafes	0.9%	9	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Yes, shops	0.7%	7	0.0%	0	1.4%	1	0.0%	0	2.8%	2	0.0%	0	1.4%	1	0.0%	0
Yes, swimming pool	6.2%	62	0.0%	0	2.8%	1	8.5%	2	11.3%	6	8.5%	3	9.9%	4	18.3%	11
Yes, other	0.8%	8	2.8%	3	1.4%	1	2.8%	1	1.4%	1	0.0%	0	0.0%	0	1.4%	1
Yes, ice rink	6.3%	63	8.3%	8	7.0%	3	4.2%	1	4.2%	2	1.4%	1	0.0%	0	2.8%	2
Yes, tennis courts	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	0.0%	0	0.0%	0
Yes, dry ski slope	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Yes, youth clubs	0.6%	6	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Yes, theatres	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Yes, football pitches	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Yes, arts and craft classes	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Yes, soft play areas / playgrounds etc	0.8%	8	1.4%	1	1.4%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.3%	13	2.8%	3	2.8%	1	5.6%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

GEN Gender of respondent.

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Male	32.6%	326	44.4%	44	32.4%	12	31.0%	6	29.6%	16	25.4%	10	29.6%	11	19.7%	12
Female	67.4%	674	55.6%	55	67.6%	25	69.0%	13	70.4%	38	74.6%	30	70.4%	26	80.3%	47
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

AGE Could I ask how old you are?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
18 to 24	1.2%	12	0.0%	0	0.0%	0	1.4%	0	1.4%	1	0.0%	0	0.0%	0	2.8%	2
25 to 34	3.5%	35	1.4%	1	0.0%	0	4.2%	1	4.2%	2	1.4%	1	2.8%	1	2.8%	2
35 to 44	18.0%	180	22.2%	22	8.5%	3	9.9%	2	5.6%	3	9.9%	4	16.9%	6	4.2%	2
45 to 54	29.1%	291	31.9%	32	23.9%	9	25.4%	5	36.6%	20	19.7%	8	18.3%	7	12.7%	7
55 to 64	18.1%	181	15.3%	15	25.4%	9	21.1%	4	18.3%	10	12.7%	5	32.4%	12	18.3%	11
65 +	29.8%	298	29.2%	29	39.4%	14	36.6%	7	33.8%	18	56.3%	23	28.2%	10	57.7%	34
(Refused)	0.3%	3	0.0%	0	2.8%	1	1.4%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

EMP Which of the following best describes the chief wage earner of your household's current employment situation?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Working full time	53.4%	534	61.1%	61	42.3%	15	52.1%	10	47.9%	26	39.4%	16	56.3%	21	26.8%	16
Working part time	7.7%	77	6.9%	7	5.6%	2	4.2%	1	11.3%	6	1.4%	1	5.6%	2	12.7%	7
Unemployed	1.7%	17	0.0%	0	1.4%	1	2.8%	1	2.8%	2	0.0%	0	4.2%	2	0.0%	0
Retired	35.6%	357	30.6%	30	50.7%	18	39.4%	7	38.0%	21	56.3%	23	32.4%	12	57.7%	34
A housewife	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.4%	1
A student	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled	0.2%	2	1.4%	1	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	1.4%	1
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

CAR How many cars does your household own or have the use of?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
None	9.4%	94	8.3%	8	9.9%	4	11.3%	2	9.9%	5	18.3%	7	4.2%	2	8.5%	5
One	41.5%	415	48.6%	48	50.7%	18	31.0%	6	40.8%	22	33.8%	14	39.4%	15	50.7%	30
Two	36.5%	365	37.5%	37	26.8%	10	40.8%	8	40.8%	22	32.4%	13	43.7%	16	35.2%	21
Three or more	11.3%	113	5.6%	6	12.7%	5	15.5%	3	7.0%	4	12.7%	5	12.7%	5	4.2%	2
(Refused)	1.4%	14	0.0%	0	0.0%	0	1.4%	0	1.4%	1	2.8%	1	0.0%	0	1.4%	1
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	

INC Approximately what is your total household income?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
£0 - £14,999	13.8%	138	13.9%	14	16.9%	6	14.1%	3	11.3%	6	21.1%	9	14.1%	5	15.5%	9
£15,000 - £19,999	5.8%	58	5.6%	6	0.0%	0	4.2%	1	5.6%	3	7.0%	3	4.2%	2	9.9%	6
£20,000 - £29,999	7.2%	72	0.0%	0	8.5%	3	9.9%	2	9.9%	5	2.8%	1	9.9%	4	7.0%	4
£30,000 - £39,999	6.2%	62	9.7%	10	5.6%	2	11.3%	2	4.2%	2	9.9%	4	1.4%	1	11.3%	7
£40,000 - £49,999	7.9%	79	15.3%	15	2.8%	1	8.5%	2	8.5%	5	7.0%	3	1.4%	1	0.0%	0
£50,000 - £59,999	7.3%	73	11.1%	11	4.2%	2	1.4%	0	5.6%	3	1.4%	1	1.4%	1	2.8%	2
£60,000 - £69,999	2.6%	26	4.2%	4	4.2%	2	1.4%	0	1.4%	1	0.0%	0	1.4%	1	1.4%	1
£70,000 - £79,999	2.7%	27	5.6%	6	0.0%	0	1.4%	0	4.2%	2	0.0%	0	4.2%	2	0.0%	0
£80,000 - £89,999	1.4%	14	4.2%	4	1.4%	1	1.4%	0	1.4%	1	1.4%	1	0.0%	0	0.0%	0
£90,000 - £99,999	0.4%	4	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0
£100,000 - £149,999	1.8%	18	2.8%	3	1.4%	1	1.4%	0	1.4%	1	2.8%	1	2.8%	1	2.8%	2
£150,000+	0.5%	5	0.0%	0	0.0%	0	1.4%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
(Don't know / refused)	42.4%	424	26.4%	26	54.9%	20	43.7%	8	46.5%	25	45.1%	18	56.3%	21	49.3%	29
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

ETH The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background?

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
White (British / Irish / Other)	95.7%	957	95.8%	96	98.6%	36	100.0%	19	95.8%	52	95.8%	39	98.6%	36	94.4%	55
Black / Black British (Caribbean / African / other black)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian / Asian British (Indian / Pakistani / Bangladeshi / Other Asian)	1.7%	17	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mixed (any mixed category)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Chinese	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	2.0%	20	2.8%	3	1.4%	1	0.0%	0	4.2%	2	4.2%	2	1.4%	1	4.2%	2
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

SEG Socio-economic Group

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
A	4.1%	41	4.2%	4	12.7%	5	4.2%	1	1.4%	1	5.6%	2	5.6%	2	1.4%	1
B	18.4%	184	26.4%	26	15.5%	6	15.5%	3	22.5%	12	19.7%	8	21.1%	8	16.9%	10
C1	29.6%	296	29.2%	29	22.5%	8	29.6%	6	25.4%	14	19.7%	8	23.9%	9	29.6%	17
C2	13.1%	131	16.7%	17	11.3%	4	9.9%	2	18.3%	10	9.9%	4	12.7%	5	7.0%	4
D	14.0%	140	12.5%	12	9.9%	4	9.9%	2	11.3%	6	11.3%	5	14.1%	5	5.6%	3
E	13.2%	132	9.7%	10	19.7%	7	19.7%	4	12.7%	7	26.8%	11	8.5%	3	22.5%	13
(Refused)	7.5%	75	1.4%	1	8.5%	3	11.3%	2	8.5%	5	7.0%	3	14.1%	5	16.9%	10
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

ZON Zone

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
Zone 1	12.5%	125	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	6.0%	60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	8.9%	89	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	29.3%	293	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	4.4%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 8	10.0%	100	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 9	3.6%	36	0.0%	0	100.0%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 10	1.9%	19	0.0%	0	0.0%	0	100.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 11	5.4%	54	0.0%	0	0.0%	0	0.0%	0	100.0%	54	0.0%	0	0.0%	0	0.0%	0
Zone 12	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	41	0.0%	0	0.0%	0
Zone 13	3.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	37	0.0%	0
Zone 14	5.9%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	59
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71

SEC Postcode Sector

	Total		Zone 8		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14	
BN133	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.8%	20
BN140	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	45.1%	27
BN189	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.1%	12
BN443	3.0%	30	0.0%	0	0.0%	0	0.0%	0	54.9%	30	0.0%	0	0.0%	0	0.0%	0
BN5 9	2.4%	24	0.0%	0	0.0%	0	0.0%	0	45.1%	24	0.0%	0	0.0%	0	0.0%	0
GU5 9	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 7	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 8	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH101	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH105	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH106	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH108	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH110	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH116	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH117	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH118	5.1%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH119	3.1%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH121	1.9%	19	19.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH122	2.6%	26	26.4%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH123	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH124	3.4%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH125	3.9%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH130	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH135	3.5%	35	34.7%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH136	1.9%	19	19.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH138	1.9%	19	0.0%	0	0.0%	0	100.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH139	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH140	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH149	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH175	1.5%	15	0.0%	0	40.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH176	2.2%	22	0.0%	0	59.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH2 8	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH201	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	11	0.0%	0
RH202	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.0%	25	0.0%	0
RH203	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.5%	22	0.0%	0	0.0%	0
RH204	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.5%	19	0.0%	0	0.0%	0
RH3 7	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 1	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 2	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH4 3	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 4	3.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 5	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH5 6	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH6 0	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH6 7	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH6 8	4.3%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1000		100		36		19		54		41		37		59
Sample:		1000		72		71		71		71		71		71		71