

GVA

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Final Report

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Horsham Town Centre Vision

Horsham District Council

2017



Horsham
District
Council

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Foreword by Cllr Ray Dawe, Leader Horsham District Council

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For and on behalf of GVA Grimley Limited

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AVIVA/Swan Walk
Denne Neighbourhood Council
Forest Neighbourhood Council
Horsham District Cycling Forum
Sainsbury's Supermarkets Ltd
West Sussex County Council
Horsham Society
Horsham in Bloom
Friends of New Street Garden
New Street Neighbourhood Action Group

Foreword by Cllr Ray Dawe,
Leader of Horsham District Council



Embracing change, respecting the past.

Our vision is that Horsham town centre will continue to be a distinctive destination of choice. This is a view that respects its attractive market town image but understands that we will need to adapt to changing patterns of shopping and entertainment and provide an accessible and enjoyable place to visit, live and work in.

This will be achieved by:

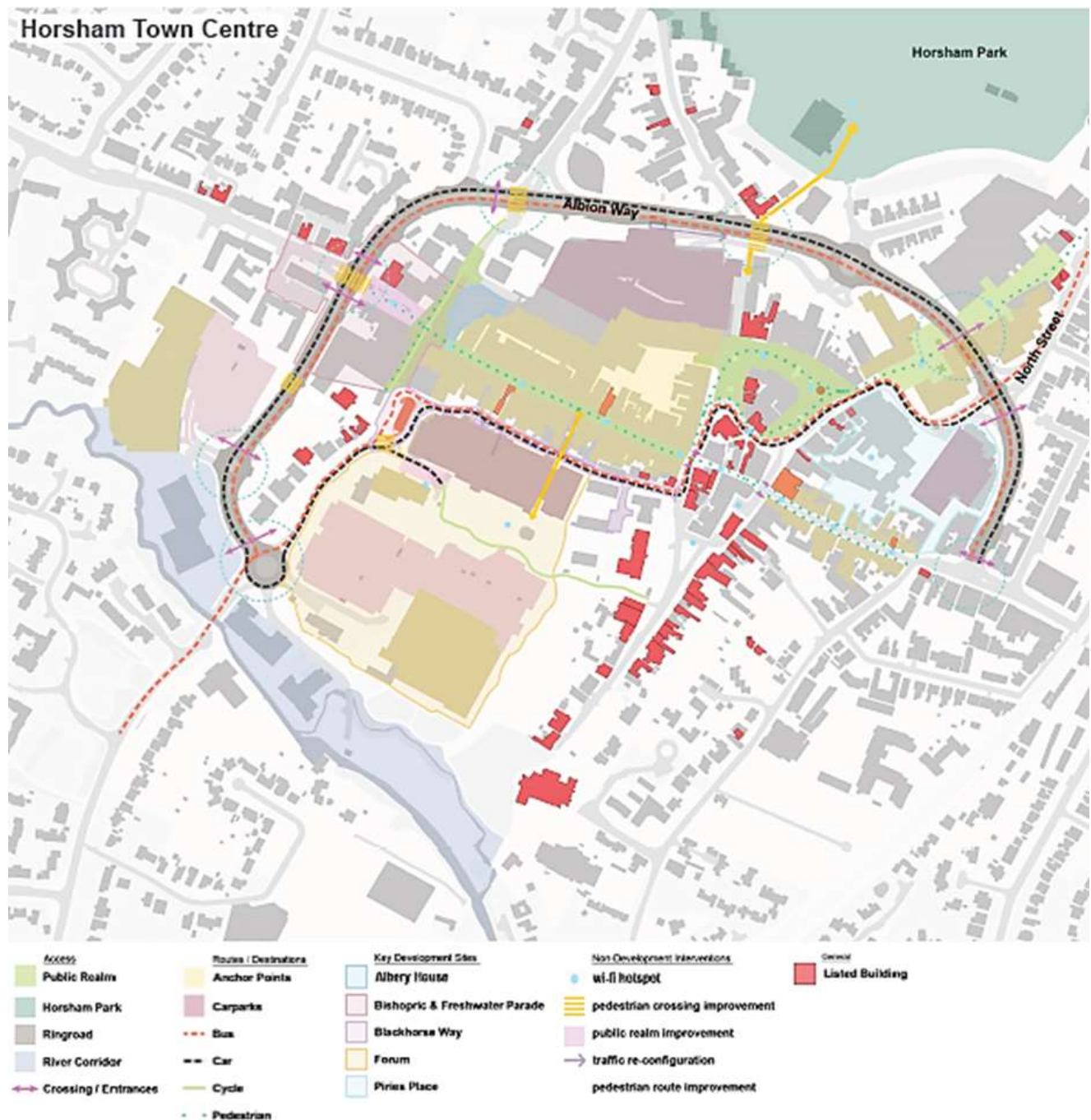
- Encouraging a choice of town centre uses and experiences for families and a fast growing local and younger population.
- Supporting new leisure, cultural and retail opportunities.
- Understanding the offer we need to make for business travellers, tourists and family visitors.
- Focusing on good gateways into the town centre and ensuring easy access for both private and public vehicle transport while delivering cycling and walking strategies.
- Maintaining the town centre's historic character and investing in creating a high quality, attractive public realm and ensuring green spaces are preserved and enhanced.

The vision in this document represents a substantial challenge. It requires not only determination by both the District and County councils but also the active engagement of businesses, community organisations and residents. They will need to lend support and help provide innovation and ideas with a strong focus on delivery to maintain the town's attraction as we face fast moving social and economic changes.

A handwritten signature in black ink, appearing to read 'Ray Dawe', enclosed within a thin rectangular border.

1. Introduction

- 1.1 GVA has been appointed to prepare a Town Centre Vision Statement for Horsham Town Centre. The objective is to establish an aspirational, comprehensive and deliverable medium term vision (10-15 years) for Horsham Town Centre. This will be used by the Council, and others, to seek to ensure proposals reflect this Vision. It should be noted that the Council cannot require landowners to bring forward particular development proposals, but it can guide and inform them.
- 1.2 This report seeks to achieve this by undertaking a thorough review of the context of Horsham, including demographic, broad population characteristics, retail, residential, office and hotel market factors, and an analysis of the town centre's current weaknesses and opportunities. This is then developed into an analysis of broad opportunity areas within the town centre, followed by specific potential development sites. The potential for, scale and type of development at each site is described, and the report then assesses potential steps to delivery of these schemes and routes to improve the likelihood that other proposals could be deliverable in the future.
- 1.3 Horsham District Council (the "Council") has already identified a number of potential opportunity sites for investigation, including:
- Piries Place and East Street Service Yard (Retail units and car park);
 - Sainsbury's, adjacent car park and Forum area including the Library and Doctors' Surgery;
 - Albery House, Springfield Road (Trend and Wilkinson's end of Swan Walk);
 - Bus station and Black Horse Way;
 - Bishopric/Freshwater Parade; and
 - Springfield Road.
- 1.4 This report will examine the potential of these sites, as well as identify other potential development opportunities in the town centre identified over the course of the visioning work. Since work began on this visioning document, planning permission has been granted for several of the sites and these proposals are considered within this report.



1.5 For the purposes of this report the Town Centre is the area bounded by Albion Way, Parkway, East Street, Queen Street, Denne Road, the River Arun and Freshwater Parade/Bishopric.

2. Baseline Review

- 2.1 This section gathers key information on the existing planning framework, demographic and socio-economic conditions that provide context for the remainder of the report. It seeks to establish the nature of the existing town and its population, as well as to identify key drivers to understand how the town centre needs to evolve.

Planning Policy Context

- 2.2 The key local planning and supporting documents relevant to the town centre are as follows:

- Horsham District Planning Framework ("HDPF") (2015);
- HDPF Policies Map (2015);
- Site Specific Allocations of Land (SSAL, 2007);
- Horsham Town Plan SPD (2012);
- Horsham Town Design Statement SPD (2008) and
- Town Framework Report (2011) commissioned by the Council and prepared by Urban Practitioners.

- 2.3 There are a number of key planning policies contained in the HDPF of particular relevance to the town centre:

- Policy 5: Horsham Town: seeks to maintain and strengthen Horsham's role as primary economic and cultural centre in the District. Development will be permitted where it:
 - Retains Horsham's position as the main settlement;
 - Contributes to arts, heritage and leisure & other services;
 - Contributes to the economy to support vibrant high street and town centre that meets local and regional needs;
 - Delivers high quality town centre residential;
 - Retains or enhances green spaces;
- Policy 11: Tourism & Cultural Facilities: supports provision of major tourism and cultural facilities in Horsham town centre;

- Policy 12: Vitality and Viability of Existing Retail Centres: recognises Horsham as the primary town centre. Seeks to improve Horsham town centre to maintain this position, and encourages diversity of uses;
- Policy 13: Town Centre Uses: provides a "Town Centres First" strategy;
- Policy SD1: Land North of Horsham: the area north of the A264, between Langhurstwood Road and Wimlands Road, is allocated for mixed use strategic development to accommodate at least 2,500 homes and associated infrastructure. Development will be programmed in order to enable its completion by 2031. Uses include:
 - Mix of residential types and tenures;
 - A business park (46,450 sqm);
 - Local Centre (including shops (6,000sqm), healthcare and community infrastructure); and
 - Two primary schools and a secondary school.

2.4 The aim of the Horsham Town Plan is to act as the Council's starting point for more detailed discussions and proposals regarding development opportunities that arise in the town over future years and help steer potential developers as to the overall aims, aspirations and priorities the Council has for the future of the town. The key guidance of relevance to the Town Centre Vision is set out below:

- Retail Guidance:
 - Increase mix of large and small retail units;
 - New retail uses to be concentrated in the key redevelopment opportunity areas: The Forum, Swan Walk and the Bishopric and Albion Way area;
 - Refurbishment rather than redevelopment is more appropriate outside these areas;
- Commercial Guidance:
 - Future commercial development, B1, B2 and small scale B8 uses, should be focused on the Hurst Road and Nightingale Road area;
 - Council will consider the loss of office floor space in the town centre subject to conditions. It should be noted that permitted development rights have enabled conversion of office floorspace outside of the control of the planning system;
- Leisure & Cultural Guidance:

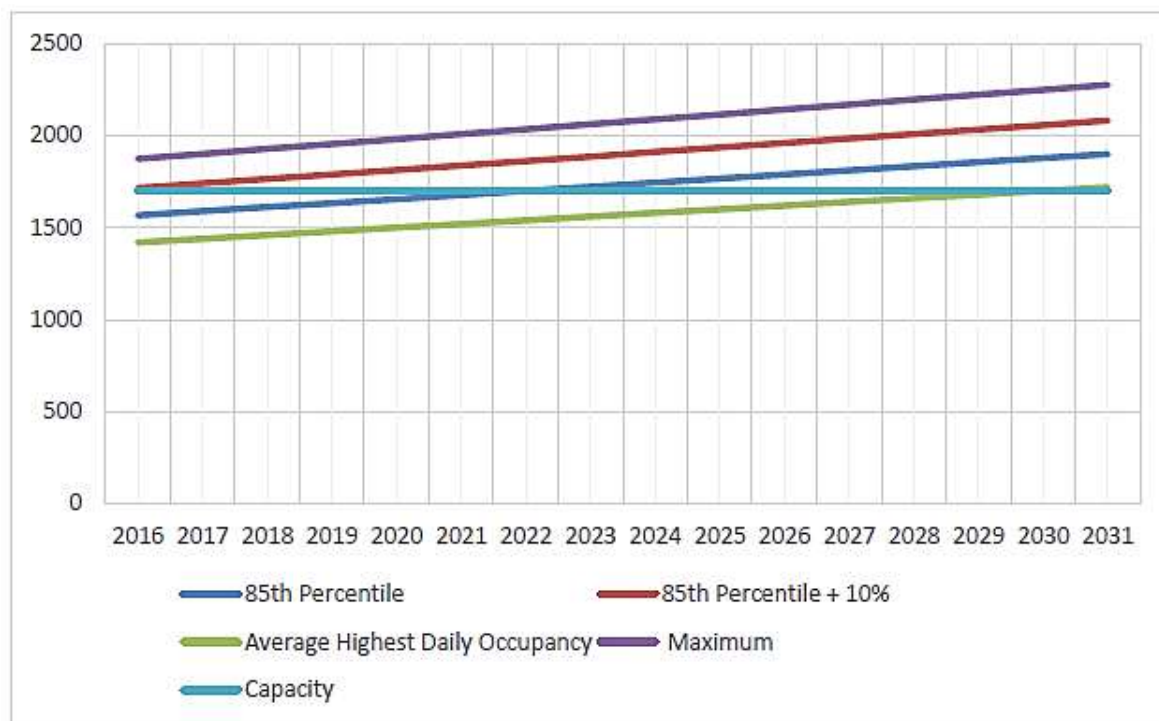
- Development of leisure and cultural facilities in the town encouraged including one or possibly two hotels in the town centre or along Hurst Road;
- Proposals that enhance the restaurant offer and night time economy are encouraged and should be concentrated on, but not limited to, the 'Quarter'; and
- Parking Guidance:
 - Parking should be concentrated in a few key locations and should contribute to a positive experience of the town centre.

2.5 Planning policies, both existing and emerging, are based on a number of evidence-base documents which include a number of headline quantitative targets or capacities which planning policies should seek to allocate for. These are summarised below:

- Housing:
 - Target of 800 homes per year which amounts to 16,000 homes over the HDPF plan period, 2011 and 2031;
 - Includes the following strategic sites:
 - At least 2,500 homes at Land North of Horsham;
 - Around 600 homes at Land West of Southwater;
 - Around 150 homes at Land South of Billingshurst;
- Retail:
 - Horsham Town Retail & Leisure Study 2016 identifies capacity across the district for c 7,000 sqm net additional convenience goods floorspace by 2021 and c 7,600 sqm net by 2026;
 - Capacity for c 4,100 sqm of comparison floorspace by 2021 and c 10,700 sqm net by 2026;
 - It is estimated in the study that c 3,000 sqm net of convenience and c 3,000 sqm net of comparison floorspace could be directed to Land North of Horsham. This would leave c 4,556 sqm net convenience and c 7,691 sqm net comparison floorspace for Horsham Town Centre, or other centres, by 2026;
- Employment:
 - The Strategic Housing and Employment Land Availability Assessment (SHELAA) (Nov 15) identifies just under c 61 hectares of land available for B class uses;
 - Additional c 28 hectares of economic land could be delivered within 6-10 years;

- The Economic Growth Assessment (EGA 2015) identifies office floorspace requirement of between 67,000sqm and 123,080 sqm; and
- Leisure:
 - Hotel and Visitor Accommodation Study (2016) identifies potential for 1 or 2 hotels in the Town Centre, to include both a mid-range and 'boutique' hotel offer.
- Future Parking Demand:
 - Horsham Town Centre Car Parking Review (2016) assesses current car parking capacity and future demand given the HDPF housing target requirements. The review concludes that Horsham will require additional parking capacity to meet projected demand by 2023 and as soon as 2018 if a 10% allowance is made for additional parking circulation space.¹
 - During some months, the Forum car park currently reaches capacity and drivers will be searching for alternative spaces in either Swan Walk or Piries Place. A car park management plan should be considered to provide visitors and employees to the town centre with the necessary information to plan their journey by either different travel means, choose a car park and minimise congestion in the town centre.

Table 1: Future Parking Demand



¹ The Institution of Highways & Transportation – advises that parking pricing should be set such that 10-15% of spaces are free at any one time to allow drivers to find a space.

The Town Centre Catchment

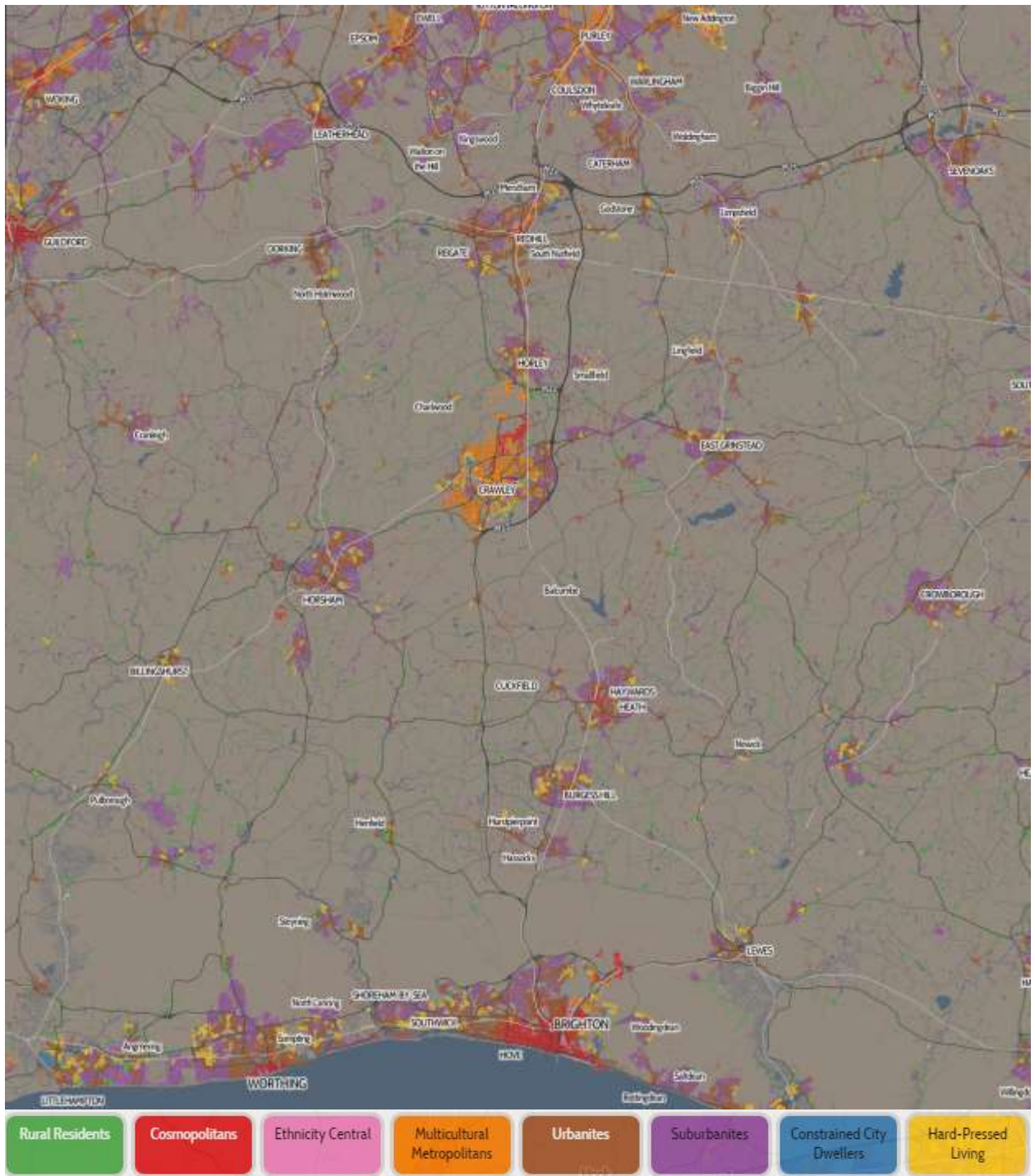
- 2.6 It is important to establish the context of who is currently shopping, living and working in Horsham. It is necessary to consider the current population alongside key population trends and other strategic drivers, in order to understand how the catchment is likely to change in the medium term, and how this may impact the town centre.
- 2.7 According to PROMIS the total population within the Horsham primary catchment area is 136,000. This is defined on the basis of the market share of the town and includes all postal sectors where the proportion of people who use the town as their main non-food shopping destination exceeds 15%. The estimated shopping population of Horsham is 93,000.
- 2.8 Horsham has an ageing population; there is a high proportion of older working age adults (aged 45-64) and the retired (aged 65 and over), and a lower proportion of young adults aged 15-24 and adults aged 25-44.

Table 2: Population Profile for Horsham & Comparator Areas (2010 - 2016)

Population by Age	Horsham	Horsham		West Sussex		South East		Great Britain	
	Population	%	+/-2010	%	+/-2010	%	+/-2010	%	+/-2010
Total	138,018	100%	5.5%	100.0%	5.5%	100%	5.9%	100%	5.5%
0-14	23,522	17.0%	-0.4%	17.1%	6.0%	18.0%	7.7%	17.7%	7.6%
15-29	20,466	14.8%	7.9%	15.2%	0.9%	17.9%	1.7%	19.1%	0.8%
30-49	34,060	4.8%	-5.9%	25.3%	0.2%	26.3%	-0.2%	26.5%	0.5%
50-64	29,473	21.4%	7.8%	19.8%	6.5%	18.9%	7.8%	18.6%	7.9%
65+	30,497	22.1%	23.4%	22.5%	14.5%	18.9%	16.4%	18.1%	14.7%
Table showing the age of Horsham district's populace and comparing the proportions within each age range against the figures across West Sussex, the South East and Great Britain. Also shown are the percentage changes since 2010 for each age range, across each of the areas									
Source: ONS mid-2016 population estimates & ONS mid-2010 population estimates									

- 2.9 The table above shows the change in population profile between 2010 and 2016. Over this period there was a fall of 5.9% in the numbers of residents aged between 30 and 49. This reflects the migration figures that suggest fewer young families have moved to the district in this period than previously.

Figure 1: Open Area Classification Map – Regional



- 2.10 The map above is an Open Area Classification map which is based on three-tiered hierarchical geo-demographic classification of the UK built using only 2011 UK Census data at the Output Area / Small Area level. It consists of 8 Supergroups, 26 Groups and 76 Subgroups. It is a useful tool to identify broad population characteristics for an area.

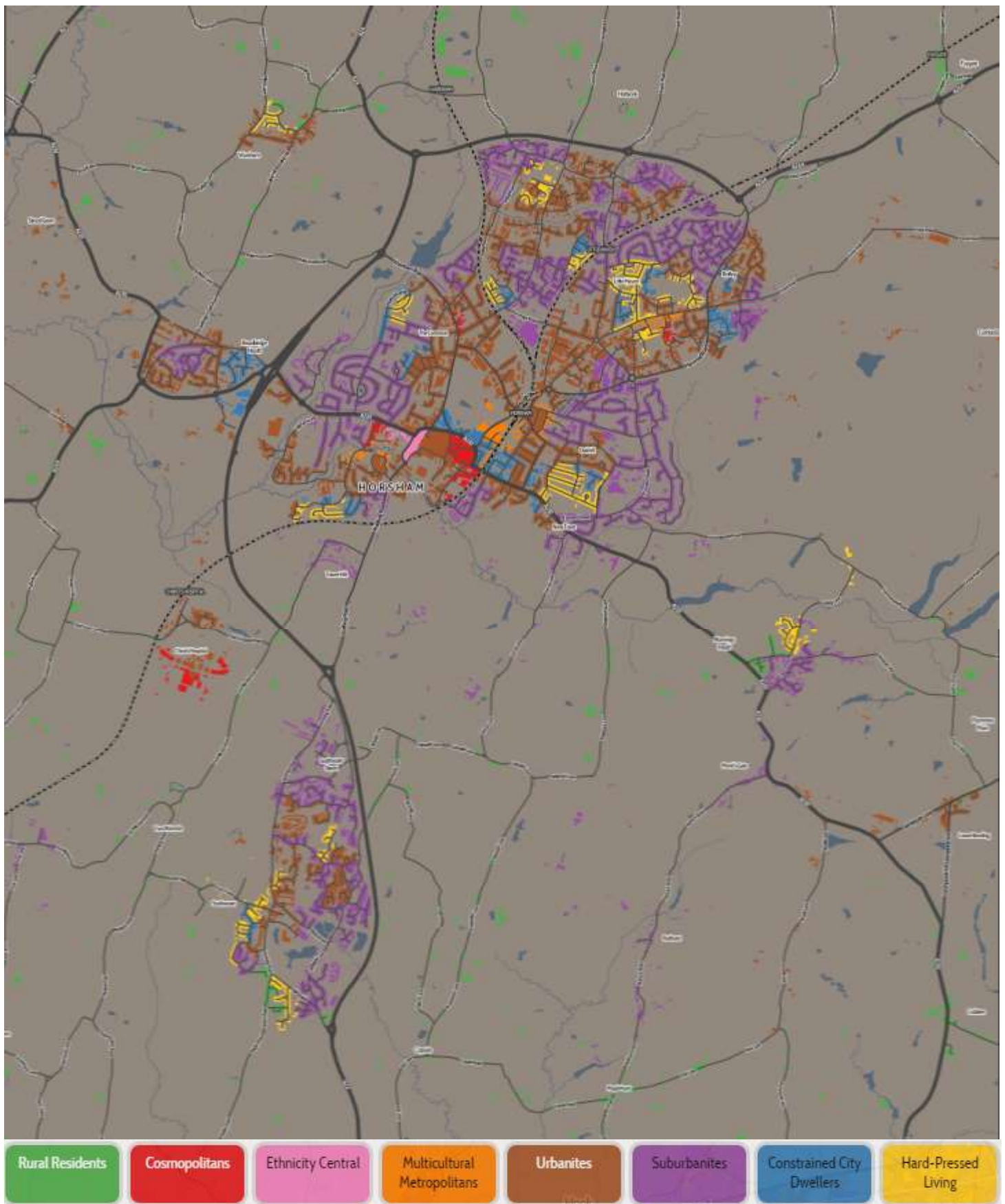
2.11 The map shows the difference in the catchment of Horsham compared to neighbouring Crawley and Guildford to the north-west. Worthing appears to be more similar in character to Horsham, as it is also largely populated by 'Suburbanites'.

- Suburbanites are defined as more likely to:
- be located on the outskirts of urban areas;
- own their own home and to live in semi-detached or detached properties;
- be a mixture of those above retirement age and middle-aged parents with school age children;
- be married or in civil-partnerships is above the national average. have higher-level qualifications than the national average, with the levels of unemployment in these areas being below the national average;
- be from a white ethnic group;
- work in the information and communication, financial, public administration, and education sectors; and
- use private transport to get to work.

2.12 By contrast, Horsham is less 'cosmopolitan' than surrounding towns such as Brighton and Guildford. Cosmopolitan populations tend to live in flats in dense urban area. They are characterised by young adults, with a higher proportion of single adults and households without children than nationally. There are also higher proportions of full-time students.

2.13 The map below is a more detailed plan of Horsham town, which suggests the population largely comprises of a mix of 'suburbanites' (defined on the previous page) and 'urbanites'.

Figure 2: Open Area Classification Map – Local



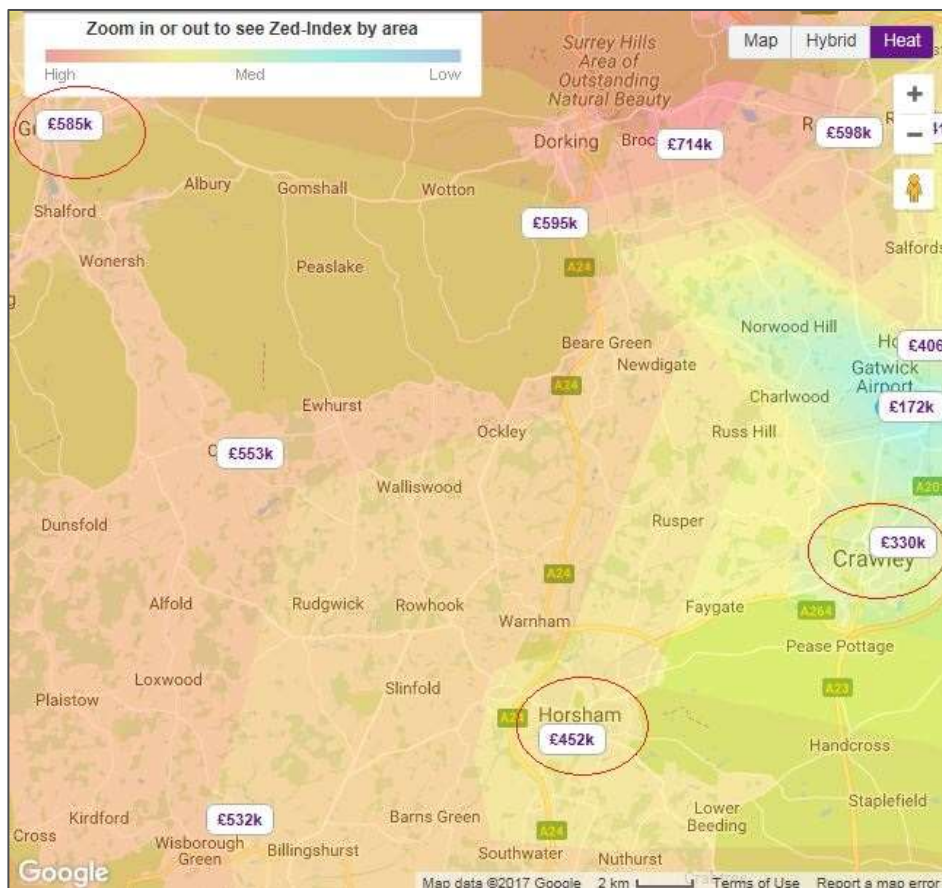
3. Market Review

- 3.1 This section provides an overview of the performance of key markets in Horsham Town Centre. This analysis sets the context for the vision, and has informed the development of options for identified opportunity sites.

The Residential Market

- 3.2 The heat map below is a property value heat map of Horsham and the surrounding area. This shows that values in Horsham are higher than neighbouring Crawley to the north east, but lower than values in Guildford to the north-west.

Figure 3: Residential Price Heat Map



- 3.3 Guildford has the most expensive housing stock, with the average property price achieved being c £585,000, compared to c £452,000 in Horsham.

- 3.4 Values in Horsham Town are broadly comparable to those of the district more widely. However, values in the town centre itself are slightly subdued compared to the rural area surrounding the town.

Figure 4: Residential Values by Property Type

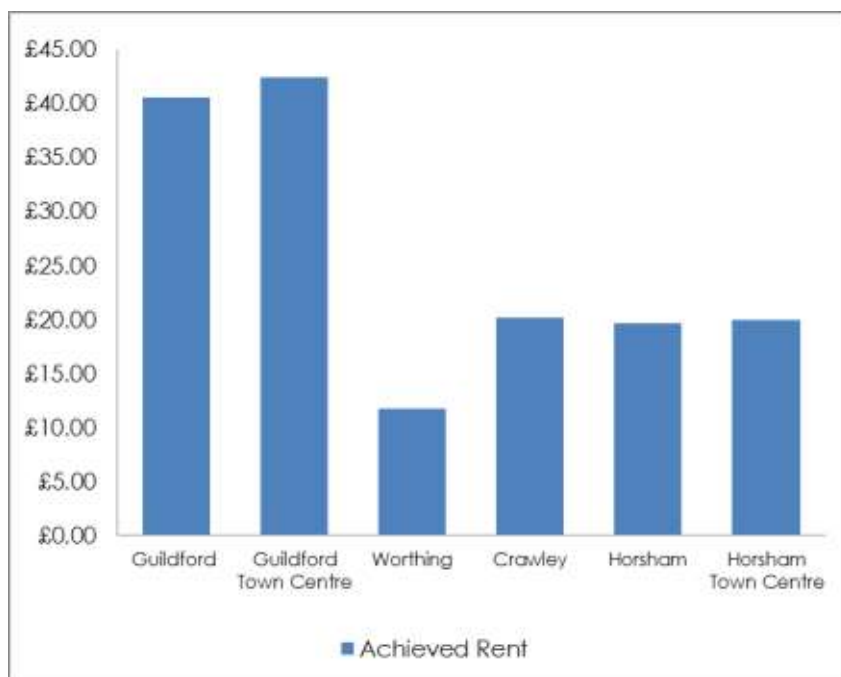


- 3.5 Average new build schemes in Horsham are achieving between £400 - £500 per square foot (psf).
- 3.6 The majority of permissions granted for the town centre are for office to residential conversion; chiefly 1 and 2 bed flats.
- 3.7 Key schemes include:
- At least 2,500 residential units and a 500,000 sq ft. business park on land north of Horsham;
 - 1,000 homes south of Broadbridge Heath;
 - 1,000 homes west of Horsham; and
 - 2,500 homes at Kilnwood Vale.
 - Over 500 residential units in the town centre achieved through permitted development of office buildings

The Retail Market

- 3.8 As a general trend, the decline of British High Streets is reported to be “getting faster.” Price Waterhouse Coopers (PwC) reports that due to the growth of e-commerce and changes in consumer habits, shops that are able to be replicated online have struggled. Other issues include the rise of homogeneity within and between centres, changing consumer expectations and a preference for providing a combination of retail and leisure, and more ‘mega’ supermarkets with a large non-food offer moving towards smaller format ‘convenience’ supermarkets in town centres.
- 3.9 Horsham’s catchment is 93,000 which is considered to be average for its size and retail offer with an expectation of population growth over the period of 2015-20. Horsham’s primary catchment population is affluent, with the age profile having a high proportion of 45-64 and over the retired age of 65.
- 3.10 Horsham has been identified as having a small, strong local economy, which is thriving. In terms of retail catchment, it is considered to be small centre.
- 3.11 Horsham is historically a market town, and the majority of the town centre is within a conservation area. The result of this is that much of the existing retail stock is either listed, or has small floor plates, which may not necessarily be attractive to typical occupiers.
- 3.12 In recent years demand for B1 uses has fallen which has had a knock-on effect on passing trade, with fewer town centre midweek daytime visitors to town centres. The proximity to Guildford, Crawley and Worthing means that Horsham has to continue to attract further investment to remain competitive. John Lewis at Home and a Waitrose supermarket have opened on the fringe of the town centre, which could be used as leverage for further investment, and to improve the footfall to the town centre.
- 3.13 The majority of retail provision in Horsham District is located in the town centre. Prime rents in Horsham are £85 psf for Zone A. This represents no change from mid-2015 levels, and is 19% below the pre-recession level at £105 psf for Zone A (Costar 2016). The chart below illustrates average ‘achieved rents’ with Guildford significantly higher than Horsham or Crawley.

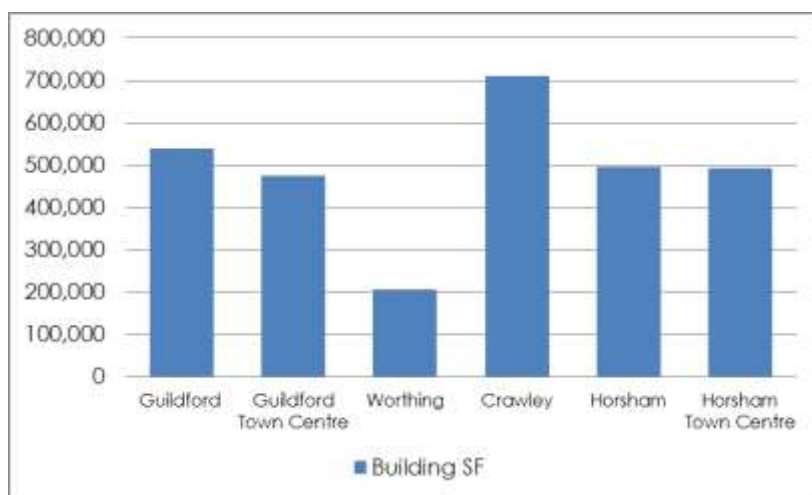
Figure 5: Achieved Retail Rents (£psf)



Source: Costar 2016

- 3.14 Horsham Town Centre contains just less than 500,000 sq ft. of retail floorspace. This is comparable to that of Guildford, and significantly less than in Crawley. There are no projects in the development pipeline to increase retail provision in Horsham; however investment in existing provision at Swan Walk and Piries Place is planned.

Figure 6: Total Retail Floorspace, in Square Foot



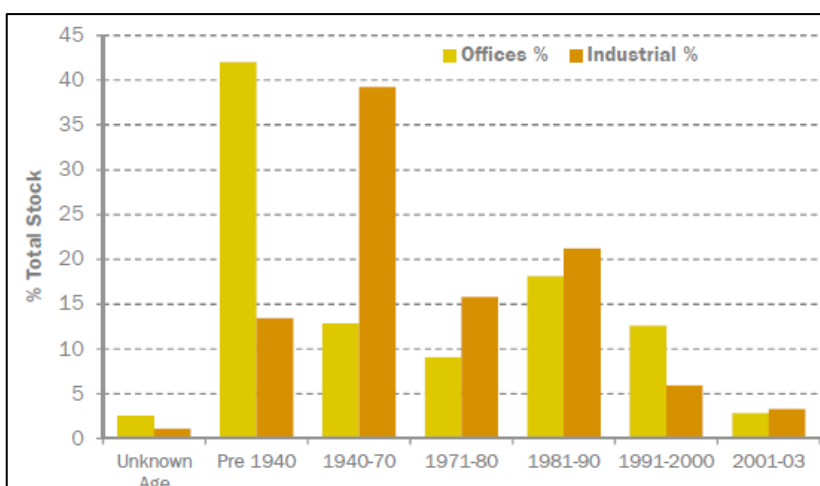
Source: Costar 2016

- 3.15 It should be noted that the above floorspace figures reflect total retail floorspace listed within the CoStar database, a leading industry agency platform. This includes all retail floorspace within a town centre area and is not limited just to core or 'prime' space.

The Office Market

- 3.16 In common with many other Sussex towns, Horsham has seen very limited speculative development over the last 10 to 15 years. Indeed, only Brighton and Crawley have seen consistent development of new commercial buildings. Crawley is a competing centre, which historically has attracted larger corporate and international companies.
- 3.17 In recent years, Horsham Town centre has seen a decline in demand for office space. This could be attributed to a number of reasons, including inflexible and unsuitable floorplates, lack of grade A space, and older stock being no longer fit purpose. There has been no recent office developments as current rental levels in Horsham are below the level required to make new office development viable. In addition to this, Horsham also forms part of the Gatwick Diamond, and occupiers often seek to locate to out-of-town business parks which are easily accessible, provide better services and have more flexible floorplates.

Figure 7: Office Stock Age Profile



Source: Nathaniel Lichfield

- 3.18 Horsham has a higher proportion of small firms, 1 -9 employees (90.2%), than the regional (89.5%) and UK (88.7%) averages. Therefore, it is evident that smaller floorplates would be suitable for Horsham town centre. Yet, due partly to the rural nature of much of the District, many of Horsham's businesses (particularly SMEs) are home based. However, with the recorded rates of start-up enterprises increasing year-on-year, there is potential to provide suitable flexible office space and workshops for these businesses in the town centre.
- 3.19 Values for office floorspace in Horsham are lower than in competing centres, such as Crawley and Guildford. Whilst this may make the town centre attractive to certain occupiers seeking more affordable space, it is likely to reflect the quality of the office stock in Horsham.

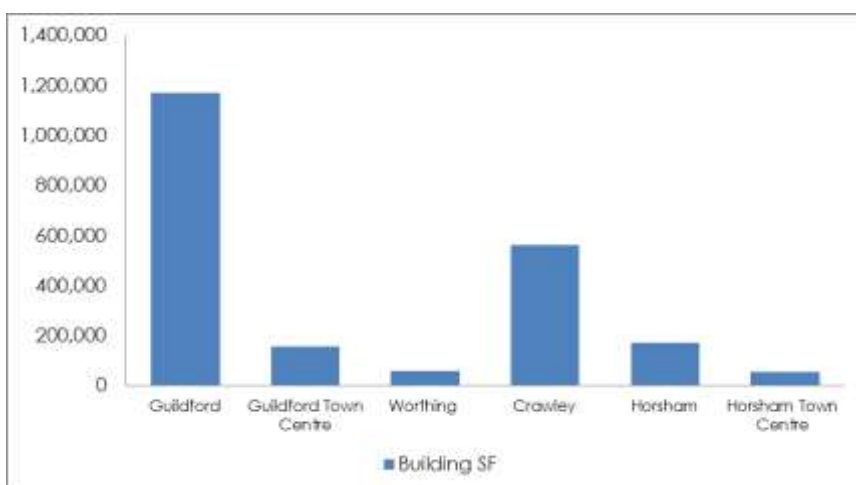
Figure 8: Achieved Office Rents (£psf)



Source: Costar

- 3.20 Relative to other centres, Horsham has very little office space provision in its centre. Guildford has a number of business parks in the borough, which accounts for much of its office space stock.

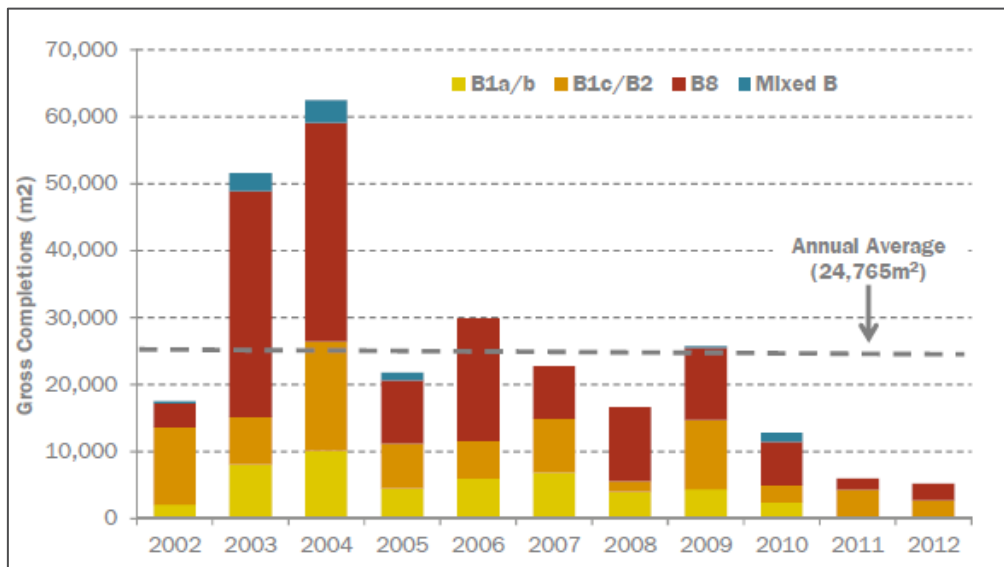
Figure 9: Total Office Floorspace, in Square Foot



Source: Costar

- 3.21 Whilst there is demand for office floorspace in Horsham, the lack of Grade A stock deters companies relocating to Horsham. Agents comment that they are already beginning to see evidence of occupiers not being able to find the quality of accommodation they would like in the Horsham area, and this will be compounded with the pressure on supply from permitted development for conversion of offices to residential use, and the lack of speculative development.

Figure 10: Office Floorspace Completions



Source: BIS

The Hotel Market

3.22 The HDPF notes that whilst tourism plays a significant role in the local economy, there is a shortage of suitable accommodation. As a result the majority of visitors only stay for the day. The 2016 District Hotel and Visitor Accommodation study identifies a current shortage of hotel accommodation for local companies, future corporate demand, domestic short breaks and weekend away market, wedding, family and friends accommodation associated with existing and future housing and population growth.

3.23 In Horsham there is the following supply of hotels:

- Travelodge – 67 Rooms; and
- Premier Inn – 64 rooms.

3.24 The Hotel and Visitor Accommodation Study (2016) identifies demand for a 3* or 4* hotel and a boutique hotel (characterful building).

Regional Hotel Values

3.25 The Premier Inn Gatwick, 204 bedrooms, sold as an investment in Feb 2014 for £26.5m (£129,901 per bedroom). The rent passing was £4,638 per bedroom and the yield was 4.68%.

3.26 These values are slightly high for Horsham, but are an indication of hotel values for the area.

3.27 The rent on the Travelodge Gatwick was £4,060 per bedroom per annum.

3.28 Some comparable deals are shown below:

Figure 11: Comparable Hotels Transactions

Year	Hotel	Bedrooms	Price (£m)	Price / Bedroom	Comments
11 2015	Jurys Inn Brighton	234	£28.23	121,561	Acquired by Charities Property Fund, NIY 5.25%
09 2015	Premier Inn Reading Central	151	£13.5	89,404	
06 2015	Premier Inn Woking	105	£11.75	111,905	Pickering Developments
12 2014	Holiday Inn Express, Croydon	156	Off guide £13.0	83,333	
02 2014	Premier Inn Gatwick	204	£26.5	£129,901	Rent passing £4,638 / bedroom, NIY 4.68%

3.29 These values would appear to be supportive of new hotel development in Horsham, even if it is likely to be a less attractive location to some occupiers than those mentioned above. The sector is experiencing relatively low yields, and this combined with the potential undersupply of bedrooms in Horsham identified by the Hotel and Visitor Accommodation Study (2016) should mean that hotels are a competitive land use in value terms.

4. SWOT Analysis

- 4.1 This section provides a summary of the strengths, weaknesses, threats and opportunities for Horsham Town Centre identified through the baseline analysis and through discussion with Council officers, local stakeholder consultation and site visits.

Strengths

Retail

- Horsham Town is a strongly performing retail centre – it was ranked second on a list of 'Premium Retail Opportunities' in 2015;
- The Horsham Town Centre Retail and Leisure Study (2017) identifies that Horsham is a strong centre with a low vacancy rate and a good mix of occupiers. Surveys confirmed that retail businesses are positive about the town centre and their on-going role there;
- Horsham is an attractive town with a historic environment, which makes it well-placed to capitalise on increasing demand for 'experience based' leisure and shopping activities. It offers an alternative to more sterile shopping centre environments;
- The BIS Research Paper 188 Policy Implications of Recent Trends in the High-Street/Retail Sector (2014) defined Horsham as a Type 4 Centre: 'Small-medium, strong socio-economic context, thriving' along with Lewes and Hebdon Bridge; and
- The Research Paper also recognised the strength of its comparison retail offer, particularly the mix of high end retailers and independent shops as key to differentiating Horsham from its neighbours. The events calendar and historic environment are key assets which are valued highly and are important to the town's success.
- Swan Walk is a key town centre retail asset given its strategic location, size and varied retail offer with overall footfall generated benefitting the wider town centre shopping experience.

Residential Catchment

- Horsham has an affluent catchment, ranked the 4th most affluent centre in the UK by Promis;
- It was ranked as second most attractive market town to live in UK in Times list of top market towns in 2015;
- The Town benefits from an active and engaged local community; and

- New development on edge of Town will deliver around 5,000 new homes. This will expand the town centre catchment population, therefore increasing spending power. The developments will also diversify the demographic mix through provision of a mix of housing types and tenures.

Commercial Activity

- Part of the South East economy and influenced by London – together representing a global economic hub;
- International connections through Gatwick Airport;
- Relatively high proportion of small businesses and above average new business formation rates; and
- Located in the 'Creative Corridor' between London and Brighton - opportunity to attract more creative occupiers to Horsham town through investment in infrastructure (Broadband) and more flexible workspaces.

Weaknesses

Retail

- Strong retail mix, further strengthened by John Lewis at Home, however comments from local community suggests more could be done to balance out high-end retail to meet demand of the whole catchment. This is further confirmed in the Horsham Town Centre Retail and Leisure Study (2017) survey data;
- Household surveys carried out as part of the Horsham Town Centre Retail and Leisure Study (2017) were generally positive, though respondents did identify that cinema and clothing shop provision in particular could be improved;
- Bishopric and Piries Place are identified by the Study as weaker environments in need of investment;
- Retail units tend to be small due to the historic setting of the town centre therefore some occupiers are trading from under-sized units; and
- Permission has been given for the redevelopment of Piries Place, to include a hotel, Everyman cinema, and cafes and restaurants. Whilst this development will significantly increase the evening economy, the significance of this area for retail will be reduced.

Office

- The office stock in Horsham Town Centre is dominated by 1980s buildings, some of which are no longer fit for purpose given their size and layout – Horsham scored poorly in Economic Growth Assessment in terms of business accommodation and supporting infrastructure.

Housing

- House prices are high making the town unaffordable for local young families and lower earners.

Catchment

- Horsham's catchment is affluent but ageing, which may impact on the future spending profile of the population, economic activity levels and the type of retail offer.

Public Realm

- Mix of paving and detailing throughout town centre – could benefit from more a holistic and co-ordinated public realm approach;
- Some areas of public realm could benefit from investment and uplift e.g. Bishopric and Queens Street; and
- Some pedestrian routes e.g. between the Forum and West Street are challenging at present – there is potential to improve legibility.

Town Centre Management

- Issues with bin storage in some parts of town centre, notably Blackhorse Way – need for more co-ordinated approach to waste management; and
- There is a lack of commercial sponsorship for a Business Improvement District.

Town Centre Gateways

- Gateways into town centre e.g. routes from the station, as well as from the John Lewis store to western end of West Street currently lack legibility and visual connection with the core town centre.

Opportunities

Retail

- Recent and on-going investment in Swan Walk, with schemes for remodelled A1 units, as well as hotel, café, restaurant and cinema uses, could attract new occupiers to town;
- The Horsham Town Centre Retail and Leisure Study (2017) identified considerable additional retail floorspace need. The Study identifies 7,500sqm net convenience need and 10,700sqm net of comparison need by 2026, though this makes no allowance for continuing overtrading of existing stores. Around 6,000sqm net of this could be directed to the new community north of Horsham. However, clearly there is significant opportunity for additional floorspace to be delivered to expand the town centre offer without damaging existing trade;
- Opportunity to further invest in events and 'pop-ups' to activate town centre; and
- Town Centres are increasingly diversifying offer to meet growing demand for leisure activities. Horsham benefits from attractive environment, therefore opportunity to further consolidate role through investment in leisure, cultural and civic offer alongside retail.

Office

- Wider shift in the economy towards office based activity, though offers are evolving to include less traditional workplace environments e.g. start-up/collaborative space in the rural/urban fringe;
- Horsham has high rates of home-working at 10.5% compared to an average of 8.3% across the South East;
- Opportunity to invest in provision of higher quality, flexible workspace hubs to meet demand from Small and Medium sized Enterprises (SMEs) in Horsham;
- Horsham also sits within 'Gatwick Diamond'; and
- HDPF target to provide 5,000 new jobs, 3,300 new homes, and 78,500 square metres of additional employment space.

Catchment

- Provision of new residential units in town centre can enliven central area, and provide boost to evening economy and 'top-up' shopping;
- The Horsham Town Centre Retail and Leisure Study (2017) confirms that as offices are converted to residential uses in the town centre under permitted development rights, this

can have a positive effect on town centre retail by expanding the catchment, particularly as residents are right in the town centre, and enhancing 'community spirit'. This particularly includes reducing crime in town centres and extending the night time economy; and

- New communities to north and west of Horsham will broaden demographic of catchment – likely to increase the number of families in the area. This will increase footfall in town centre and presents opportunity to diversify offer.

Tourism

- Evidence from Historic England research suggest visits to historic places accounted for 69 million day visits in England in 2012; and visits to historic environments have grown 10% between 2001 and 2011;
- Cycling tourism also growing – over the last 5 years bike sales have increased by 14% ; and the industry worth £745mn in 2013 (up from £639m in 2008);
- Cycling tourists tend to have above average incomes, stay in independent accommodation and eat locally;
- Opportunity to make Horsham more cycle friendly by investing in 'green routes' into the town centre, providing 'bike friendly accommodation, infrastructure and developing a Walking and Cycling Strategy; and
- Opportunity for more comprehensive and co-ordinated approach to tourism and branding that emphasises Horsham's strategic location as gateway to the South Downs National Park and the High Weald Landscape Trail, and attractive base to explore area from.

Threats

Retail

- Growth of competing centres and 'mega-centres', particularly the proposed Westfield development at Croydon – need to ensure Horsham remains competitive by differentiating offer;
- The Horsham Town Centre Retail and Leisure Study (2017) identifies Brighton, Guildford and Worthing as key competing centres which draw trade from Horsham's catchment;
- Diversity of retail offer – given the popularity of Horsham as a location for high end retail, there is a risk that low earners may feel excluded by offer;

- The continuing rise of e-commerce: may take trade from traditional retailers, though there may be opportunities presented by click and collect (Horsham Town Centre Retail and Leisure Study (2017));
- Out of town retail will continue to offer stiff competition to town centres, to be mitigated by promoting retailer mix and allocating sites for the development of modern units. The 'experience' offered by the high street is its key point of difference (Horsham Town Centre Retail and Leisure Study (2017)); and
- Loss of key anchors could impact on strength of Horsham as a destination.

Commercial

- Decline of office based employment in town – threat of RSA relocation;
- Oversupply of 1980s office buildings as large occupiers scale back presence - need for new high quality space;
- Competition from out of town business parks at North Horsham and the former Novartis site;
- Loss of office market could impact on day-time footfall in town centre; and
- Although Heathrow has been chosen as the recommended airport for further expansion any alternative decision to support Gatwick could potentially impact on performance of Horsham office market, particularly if Gatwick further strengthens as location. Conversely, a decision in favour of Gatwick may afford Horsham spill-over opportunities.

Catchment

- High proportion of out-commuting to neighbouring towns – need to boost high skilled jobs in Horsham;
- Impact of ageing population on economic productivity of town;
- Impact of high cost of living on affordability of Horsham for young families and low-earners;
- Increasing pressure to house overspill population from London, as well as Brighton, which has unmet housing needs of 17,000 units, and other constrained coastal towns to the south; and
- Rapid growth in population could put pressure on existing infrastructure, particularly the transport network.

Community Infrastructure

- Risk that community could feel disconnected from change process in town centre if not fully engaged; and
- Lack of a community hub in town centre could limit role of community in driving change.

Image and Identity

- A historic market town identity within the South East provides many advantages; however perceptions may limit new investment from next generation retailers and businesses and its appeal to young and affluent households and consumers.

5. Strategic Town Centre Review

- 5.1 This section examines more closely the nature of Horsham town centre in terms of its use, characteristics and form. It then builds on both this examination and the SWOT analysis (see previous section) to identify strategic directions for the town centre which future development should seek to realise.

Who Uses the Town Centre?



Carfax

- 5.2 Horsham has a relatively localised catchment. Analysis of the survey data supporting the Horsham Town Centre Retail and Leisure Study (2017) provides a broader understanding of the retail centre context and the transport links and routes that connect into the town centre can help to understand who its users are. The key groups visiting the town centre are, in general terms:

- Horsham Residents (those who are shopping and spending their leisure time in the town centre);
- Horsham Employees (those who work in Horsham town centre, and who live either in Horsham or further afield); and
- Horsham Visitors (those who are visiting the town centre from outside Horsham).

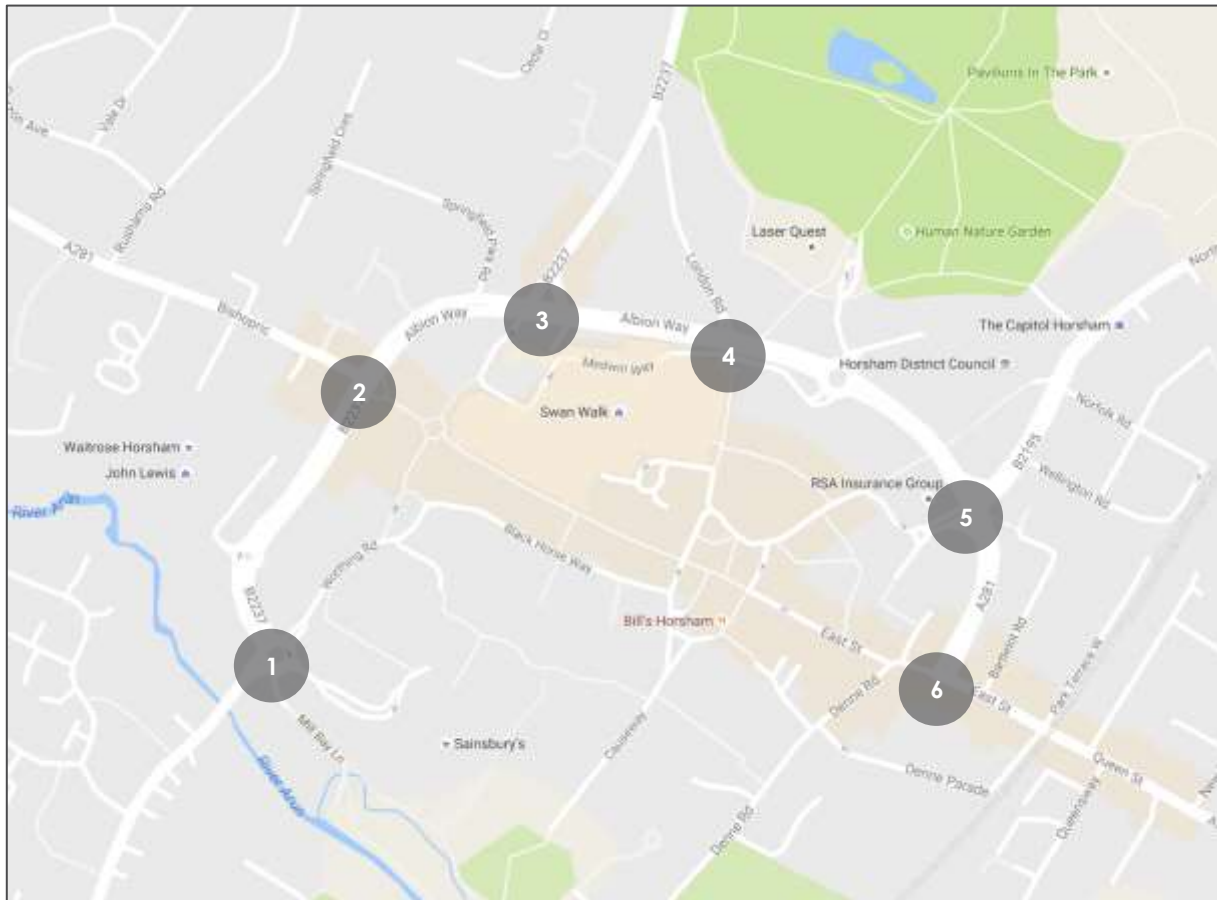
- 5.3 Each of these key groups is likely to use the town centre at different times, for different periods of time, and for slightly different reasons. However, a strong retail and leisure offer and good employment opportunities are the key strengths the town centre should aim to provide for these groups.

- 5.4 There is scope for Horsham town centre to improve its tourism role, and to attract visitors from further afield. Horsham's historical environment is one of its main draws and a point of differentiation from some competing centres. This attraction is well recognised. Horsham also has a number of other merits that could be improved to attract visitors to stay in the town rather than pass through it.
- 5.5 Firstly, Horsham has good connections to Gatwick, making it easily accessible for tourists, business travellers and Gatwick-related employees. Secondly, Horsham is strategically located near Areas of Outstanding Natural Beauty (AONBs) and at the start of the High Weald Landscape Trail, and could be a good gateway to the South Downs National Park and the South Coast; it is therefore an attractive base to explore the countryside. There is also potential for Horsham to accommodate cycling tourism, as the town is within reach of London and Brighton with the 'Downslink' cycle path, from Chertsey to Shoreham, passing to the west of the Town Centre through Southwater.
- 5.6 Improving the hotel provision could play a key role in rebranding the town centre to attract visitors. The Hotel Study (2016) by Hotel Solutions concluded that Horsham town centre would be able to accommodate a boutique and potentially one or two mid-range hotels which could greatly improve the town centre offer, which currently only has budget hotels and is not seen as a holiday (short break) destination.

Town Centre Gateways

- 5.7 Those who use the town centre access it through a number of key gateways. Due to the existing road infrastructure and public transport links, it is evident that access to the town centre is car-orientated, with cars being the preferred method of transportation into the town, supported by substantial car parking provision. The town centre is also accessed via public transport, which is more likely to be used by visitors to Horsham, or those working in the town centre.
- 5.8 The key town centre gateways are identified in the plan below.

Figure 12: Town Centre Gateways Plan



- 5.9 **Gateway 1** provides access to the town centre to/from the surrounding southern towns and villages, via Worthing Road, which connects to the A24. This key gateway is an important access point for those travelling by bus to the town centre, as the bus station is located on Worthing Road. There is poor visual amenity for pedestrians at Albion Way, though the route up Worthing Road is pleasant, if narrow.
- 5.10 **Gateway 2** provides access to the town centre from the western residential area of Horsham by car using the A281 which also connects to the A24. There are pedestrian crossings with traffic lights which connect Freshwater Parade and Bishopric by foot, though Albion Way remains a barrier.
- 5.11 **Gateway 3** provides access to the town centre by car for the northern / western residential areas of Horsham via the B2237, which again connects to the A24. A pedestrian crossing links Springfield Road with the B2237, though there is little to signal the start of the town centre to pedestrians.

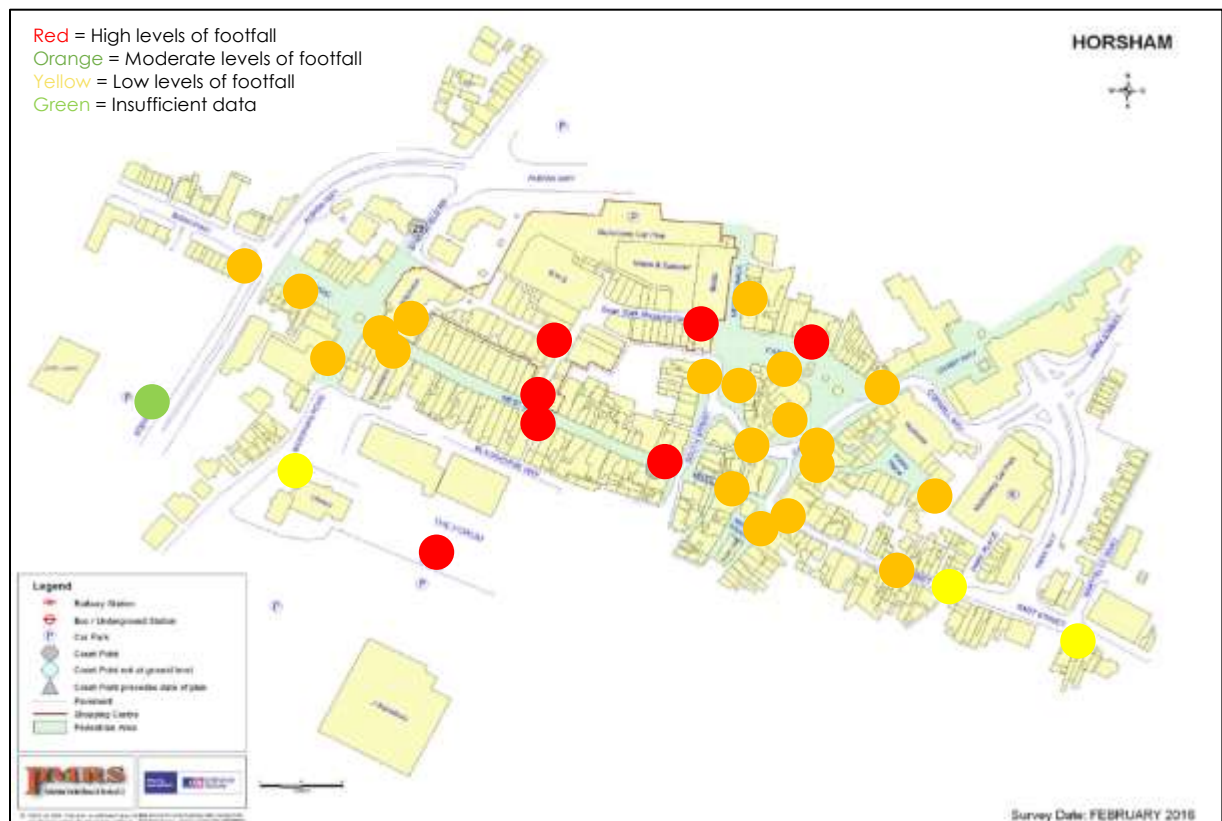
- 5.12 **Gateway 4** provides a connection for residents or visitors who are accessing the town centre from the north of the town. It is the only gateway which has a “green” route to the town centre. The public right of way across Horsham Park provides an access route for residents or visitors who are either cycling or walking from the north of Horsham town or taking a slightly longer route from the train station. The Jubilee Walk/Albion Way underpass and Medwin Way crossing, however, remains an unappealing route.
- 5.13 **Gateway 5** is the main route for those visiting Horsham via train. The B2195 (North Street) provides a straight line access route to the train station. However, the distance from the train station to the town and the lack of signage creates a poor connection visually. Additionally, the existing path along the road, although pleasant, does little to create a sense of place and animate the gateway to the town centre. Chart Way, which turns off North Street to travel past the Council offices and other office buildings, provides a pedestrian only environment directly into Carfax, but it does not provide the sense that it is a key route into the town centre.
- 5.14 **Gateway 6** provides access to the town centre via East Street, and is primarily car-orientated. This is comparably a lesser used entrance point; however it does provide access directly to the restaurant and bar cluster in East Street. Again, this entrance is not well communicated.
- 5.15 To some extent, it is these key gateways which have had a role in shaping the town centre and dictating how people currently use and move through the centre.

Key Footfall Drivers

- 5.16 Within the town centre, there are a number of locations which constitute key footfall drivers. By identifying these and tracking movement between these locations, one can accurately understand the role of the existing town centre.
- 5.17 The Survey work undertaken by Pedestrian Market Research Service's (PMRS) as part of the Horsham Town Centre Retail and Leisure Study (2017) shows that the majority of footfall for the town centre occurs around Swan Walk, West Street and The Forum. This reflects the routes to Swan Walk and the town centre's core retail offer, with West Street constituting the main retail high street.
- 5.18 The highest footfall counts were recorded at:
- Fat Face (inside Swan Walk, eastern entrance);
 - Jones Shoes (Swan Walk, West Street entrance);
 - Waterstones (Carfax);

- Pret a Manger (West Street, opposite Swan Walk entrance);
- New Look (inside Swan Walk);
- Sainsbury's car park steps (The Forum); and
- Halifax Building Society (Carfax).

Figure 13: PMRS Footfall Survey Heat Map



5.19 These locations map a strong north/south axis across the town centre linking Swan Walk shopping centre and the multi-storey car park, across West Street to the Sainsbury's store and car park. More specifically, the high footfall count at Forum Way reflects the importance of the connection from this direction to the centre's retail and leisure clusters for those who have entered the centre through Gateway's 1 and 2, and who have parked in the large Sainsbury's car park. Sainsbury's is a key footfall driver, and reflects shopping patterns whereby visitors park at Sainsbury's, visit West Street and other parts of the town centre, and then visit Sainsbury's before leaving the town centre.

5.20 The lowest footfall count point locations were recorded on the outer western and eastern periphery of the primary shopping area:

- Library (Worthing Road);

- Church (Springfield Road);
- Bath Store (East Street); and
- Norsat (East Street).

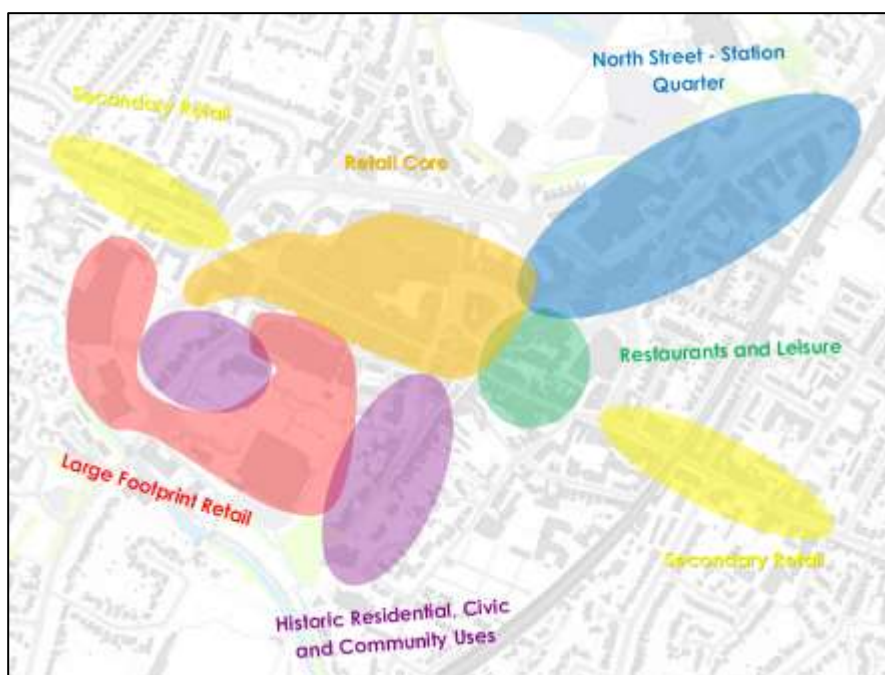
5.21 The footfall survey did not identify high levels of footfall near East Street. However, the footfall survey was undertaken during the day and does not reflect the footfall activity in the town centre at night. East Street would generate a proportionally higher footfall at night, relative to the rest of the town centre, as the restaurant offer and evening economy is predominately located here.

5.22 Although John Lewis at Home could be considered a key footfall driver, its connection to the town centre is weak, with Albion Way acting as a barrier between it and the town centre. There is no easy crossing point for pedestrians and cyclists moving between the John Lewis at Home and the rest of the town centre. There is a danger that such provision could lead to a single stop and therefore it is recommended that the Council seeks to enhance linkages between the store and the rest of the town centre.

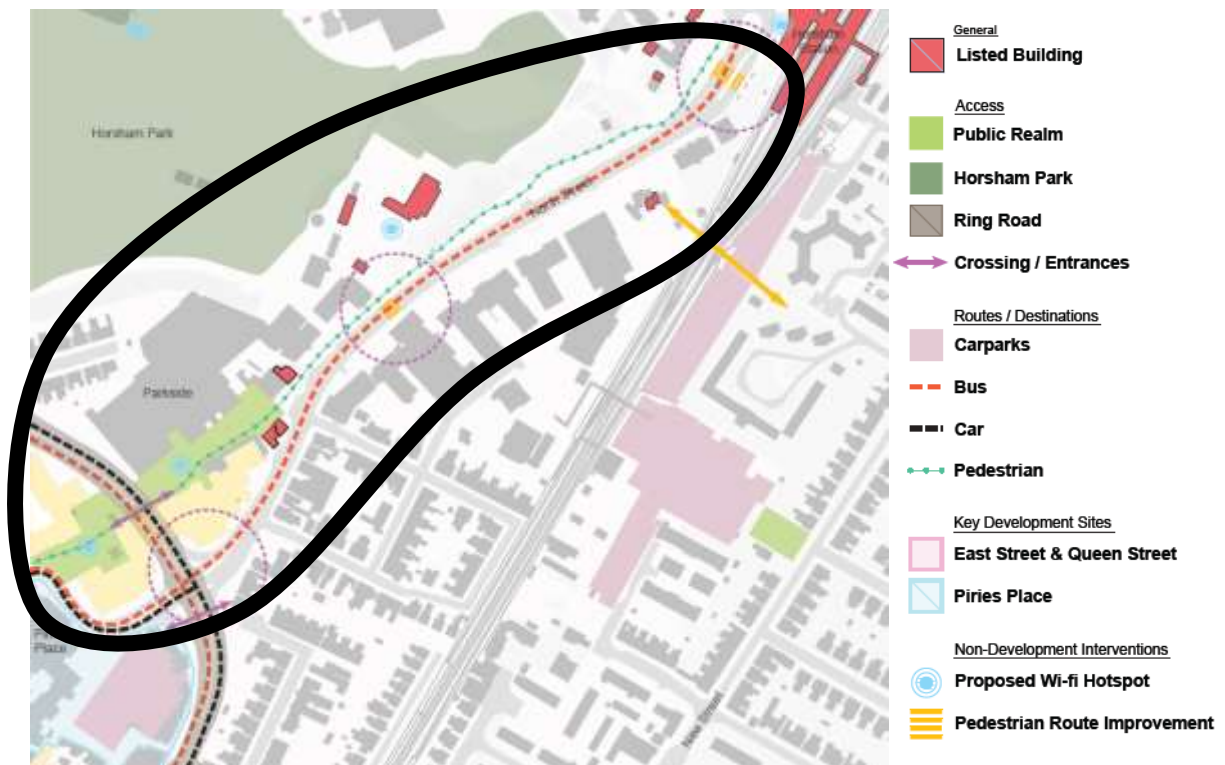
Town Centre Character Areas

5.23 The town centre can broadly be divided into six different character areas, according to the land use and building typologies in each. A Character Areas Plan illustrating the location and extent of each character area is provided below.

Figure 14: Town Centre Character Areas



North Street – Station Quarter

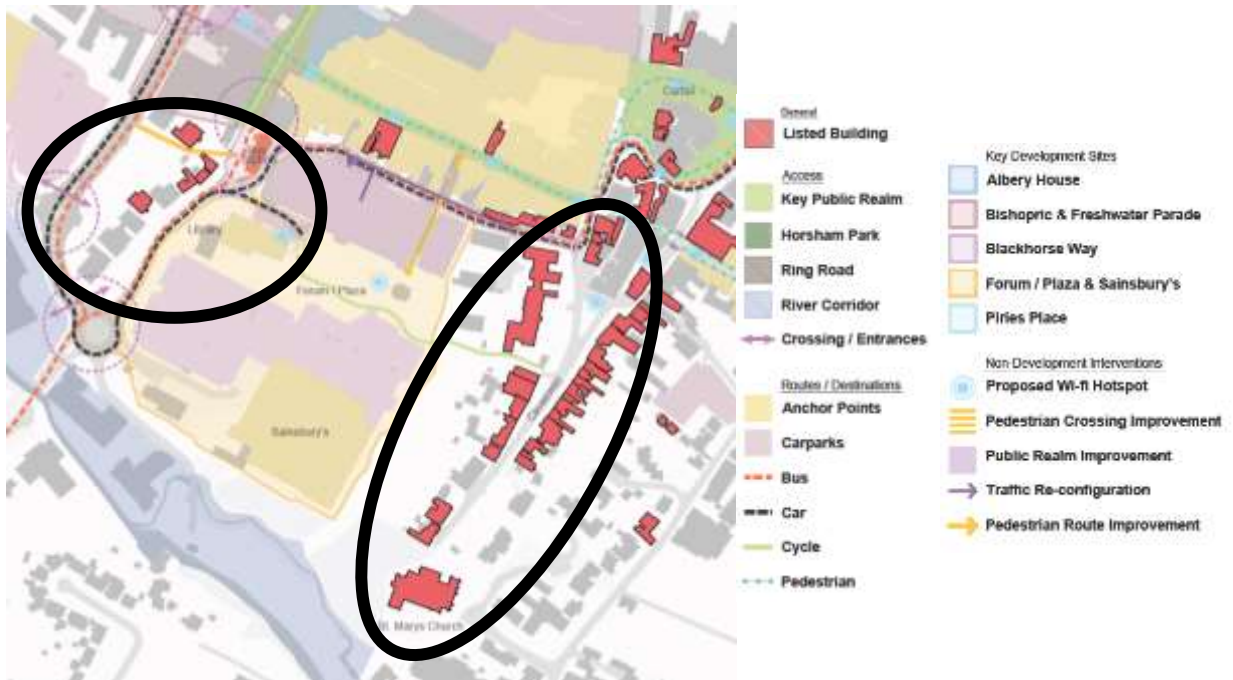


- 5.24 This is predominately where offices are located in Horsham town centre, such as Horsham District Council and West Sussex County Council offices, RSA Insurance Group and The Creative Assembly. The attractiveness for office activity in this location is driven by the proximity and accessibility to the railway station and the food and beverage offer to the east of the town centre (Piries Place and East Street). The office cluster here also benefits from good visibility on a key gateway into the town centre.
- 5.25 Generally built in the 1970s and 80s, these are large footprint buildings with corporate occupiers, which extend away from the town centre along North Street. Linden House, like some other office buildings has been converted to residential use taking advantage of 'Permitted Development' rights.



North Street – towards Town Centre

Historic Residential, Civic and Community Uses



- 5.26 The Causeway, located to the east of Sainsbury's and south of Carfax, features historic residential buildings of character, which should be referenced by new development in Horsham to preserve and define its image. Historic residential buildings are also located to the west of Worthing Road, some of which now house businesses. These streets effectively bookend the relative modernity of Sainsbury's and The Forum.

- 5.27 St Mary's Church is also located at the south of The Causeway, and Horsham Library and Citizen's Advice Bureau is located just to the east of Worthing Road. These areas therefore also have a civic and community function. There is also a children's play area to the east of the library.

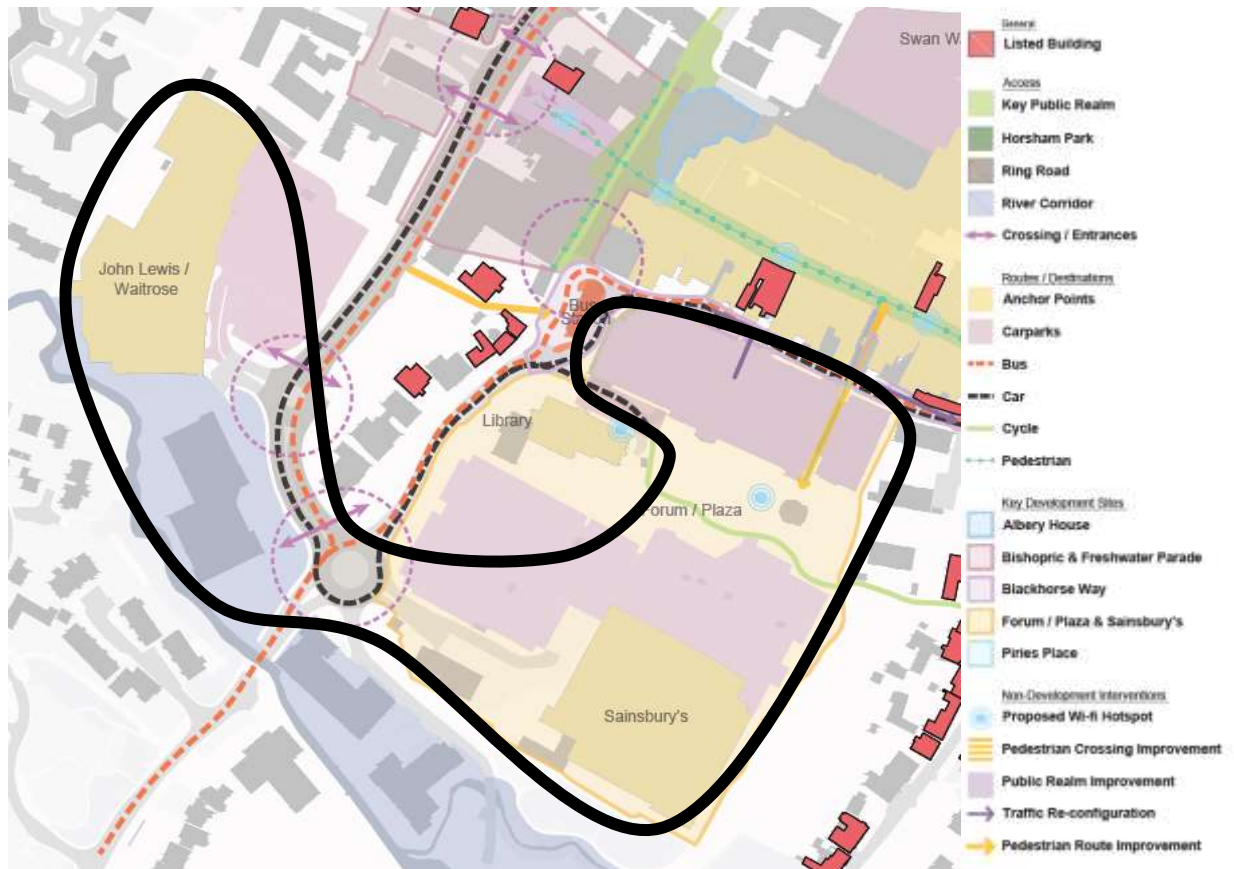


Causeway



St. Mary's Church

Large Footprint Retail



- 5.28 In contrast to the predominantly historic core shopping area, the areas to the south and southwest of the town centre feature large retail stores. This area functions much like an out-of-town or edge-of-town retail park, with large footprint retail units, and the majority of visits being by car.
- 5.29 The Sainsbury's superstore is the main convenience retail offer in the town centre, and the associated (predominantly surface) car park also services the wider town centre. This is a large format store suitable for weekly shops.

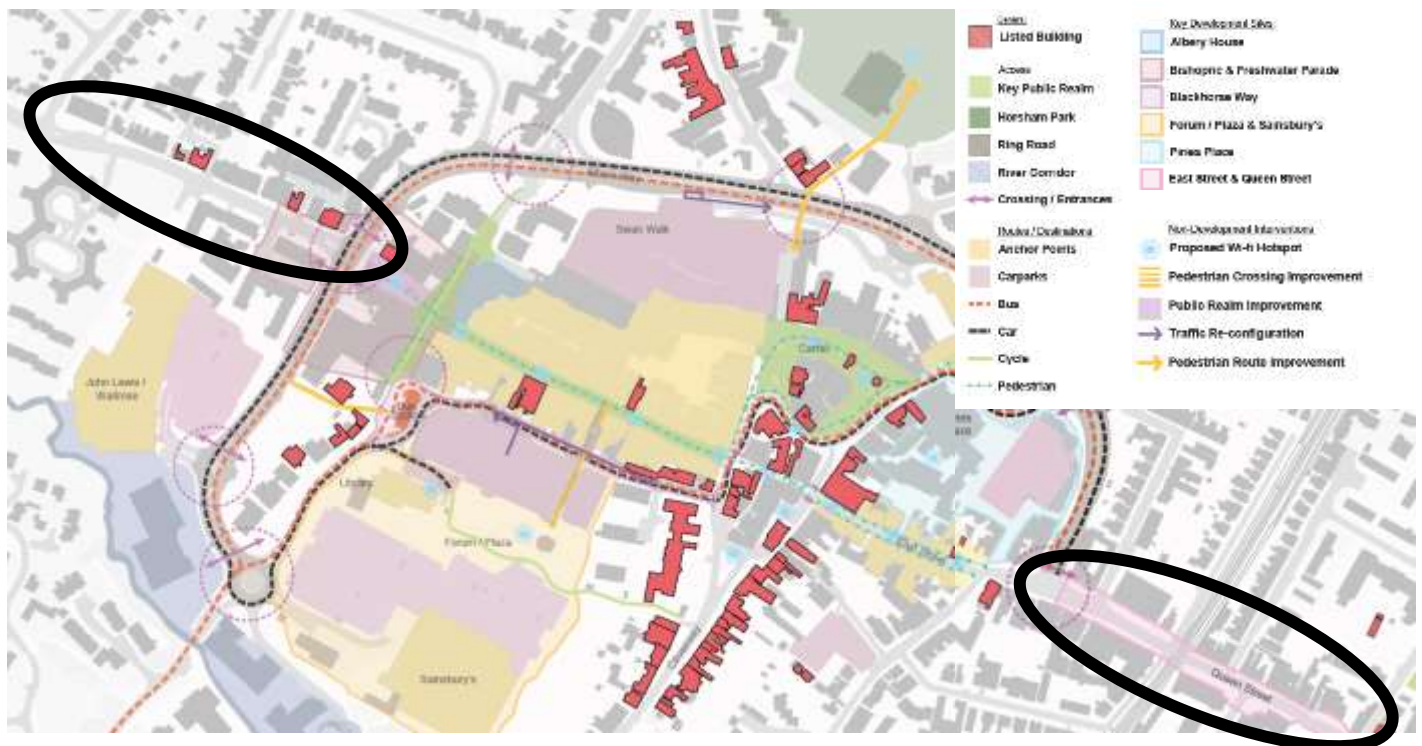
- 5.30 Also included in this area are Currys, Office Outlet (formerly Staples), John Lewis at Home and Waitrose stores to the east of Albion Way and Worthing Road. Whilst these areas do not necessarily link together, they are by-and-large similar formats. In addition, The Forum, located to the north of Sainsbury's, acts as something of a halfway house between the large footprint stores and the historic High Street, in that it includes mid-sized retail units which may be found equally in town centre or out-of-town settings.





Forum Piazza

Secondary Retail



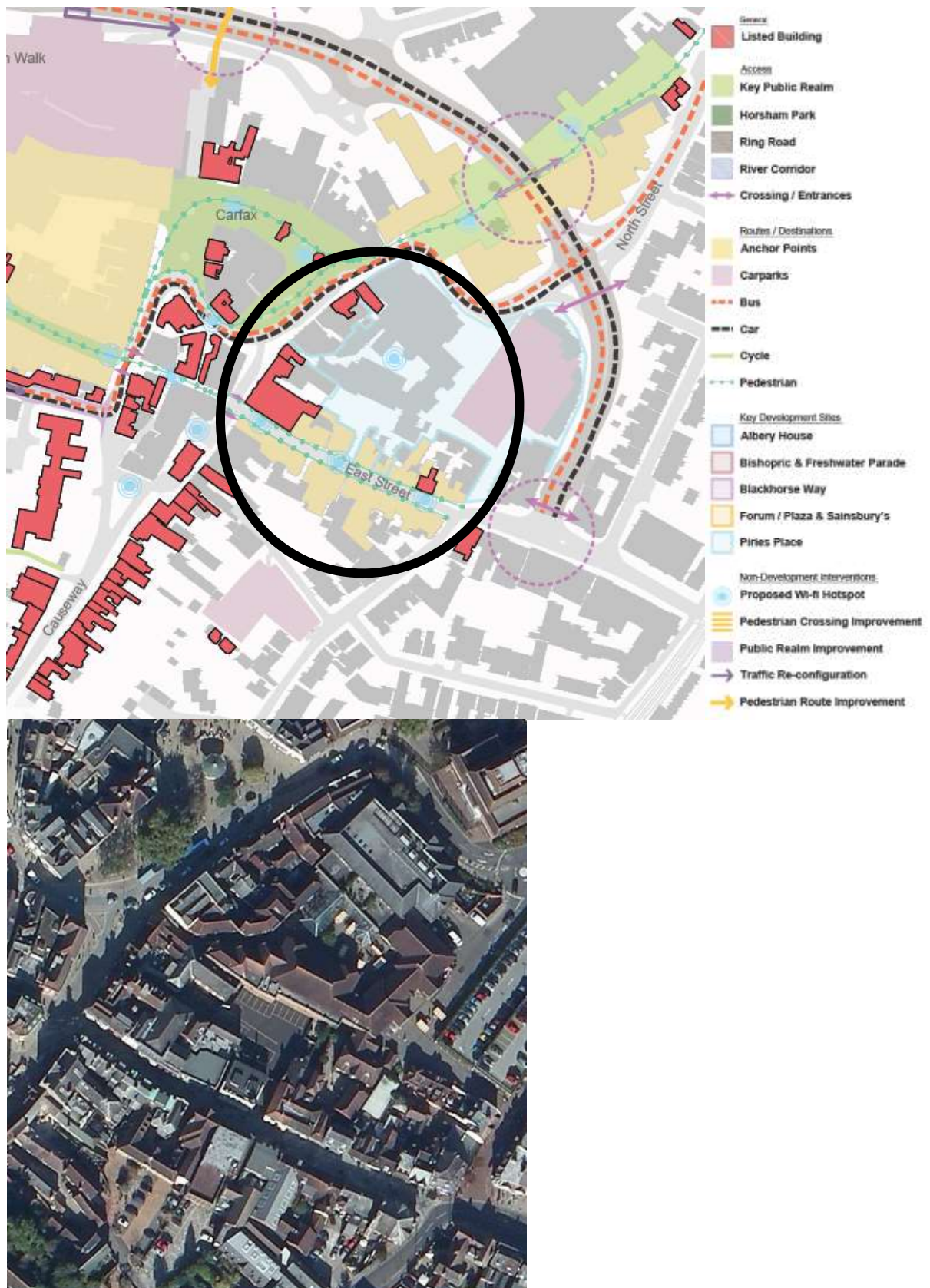


- 5.31 Bishopric at the western end of the town centre, and Queen Street and part of East Street at the east, represent the secondary retail areas of Horsham. Both contain a mix of occupiers and types of unit, but both share a propensity towards more independent occupiers, and a higher proportion of A5 (hot food takeaway) units and vacancies. There is generally a lack of visual continuity, with a diverse mix of building types, and connection to the core town centre is limited by Albion Way.



Queen Street

Restaurants and Leisure

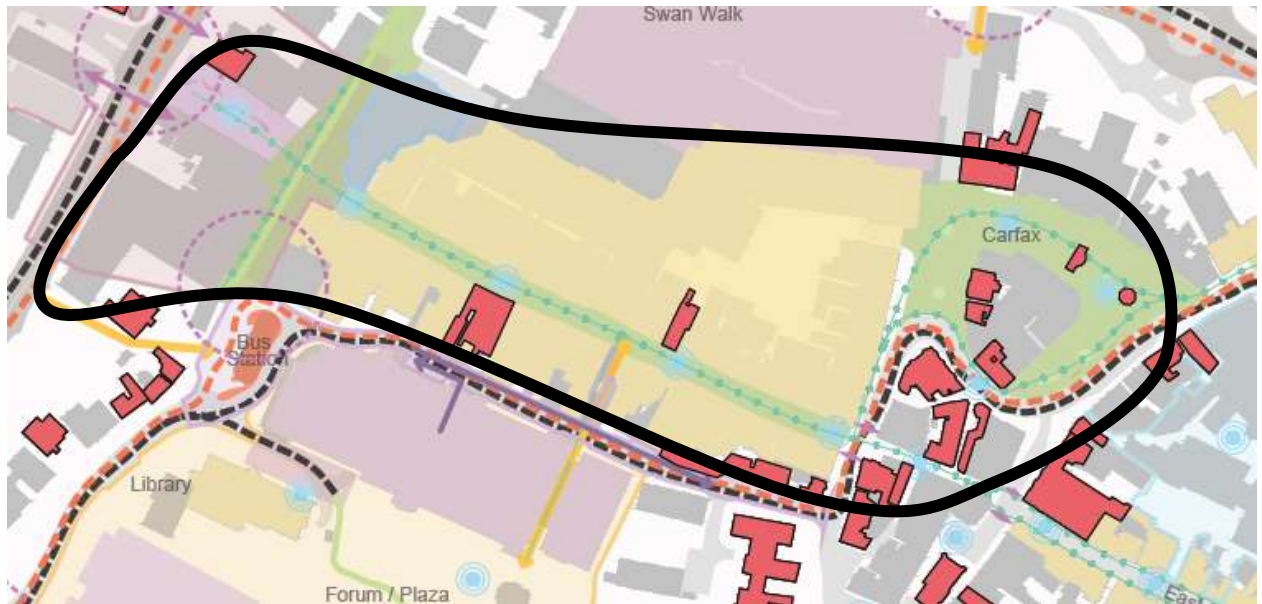


- 5.32 East Street and Piries Place constitute the main dining district and centre for the night time economy of the town centre, with occupiers including Strada, Pizza Express, Wagamama and Côte. Many of the buildings are historic and contribute positively to the town centre streetscape, reinforced by the predominantly pedestrianised section of East Street. Attractive, historic buildings also front Carfax.
- 5.33 The predominantly restaurant and leisure focus continues into Piries Place, with a number of bars in this location. There is also a significant multi-storey car park in this location, at Piries Place; one of three main car parks serving the town centre as a whole.



East Street

Retail Core



- 5.34 The core retail area of Horsham includes West Street, Swan Walk shopping centre, and Carfax. Within this broad area there is a variety of shopping experience provided, with West Street representing the historic high street with small and varied shops with generally mid-high end occupiers; Swan Walk offering larger, covered units with more mid-market occupiers; and Carfax again providing a historic environment, but over a more expansive area with a more civic feel, incorporating street furniture and the bandstand, with occupiers including a high proportion of banks and estate agents. This mix of areas and experiences work well in combination and constitutes the core 'image' of Horsham.
- 5.35 Whilst all of this area is the main shopping area, West Street in particular is Horsham's prime pitch.



West Street

Strategic Direction for the Town Centre

- 5.36 Having assessed the existing town centre, the actions advised to be undertaken to fulfil the vision for the town centre are summarised into the following strategic directions:

Respond to Demographic Change

- 5.37 At present, Horsham town centre caters for a predominately elderly demographic. However, due to the housing development coming forward to the west and north of the town, there is a need to consider diversifying the town centre offer to cater for a wider audience and

encourage greater community participation. Additionally, the new audience should include tourism visitors.

Strengthen Retail and Leisure, Support Employment Growth and the Economy

- 5.38 The role of town centre has changed in the recent years. It is important to diversify the offer and provide a mix of uses to create activity and excitement in the town centre. To facilitate this, town centre proposals should look to provide a mixture of differently sized spaces. Specifically in Horsham, smaller spaces for rent should be made available, which would support start-ups, independent retailers and help to create an entrepreneurial culture. From a tourism perspective strengthening the independent retail offer could help to distinguish Horsham from its competing centres, but to also attract more regional visitors.

Increase and Diversify Housing Provision

- 5.39 Within the town centre, new housing is an important land use. Proposals should include high quality contemporary housing design, to create positive perceptions of Horsham. Town Centre living also reduces pressure on development in the countryside, and supports the retail core.

Improve the Hotel Offer

- 5.40 There is an opportunity to strengthen the hotel offer in the town centre and provide an alternative to Gatwick corporates, road-side hotels and country B&Bs. There is a need for a contemporary, in-town offer for business travellers, weekend tourist and family occasion visitors.

Support New Community Infrastructure

- 5.41 Provision of community facilities is poor in the town centre, yet they are an important asset for creating activity and attracting Horsham residents into the centre. Moreover Horsham will have an even greater role to play in supporting sufficient community facilities in the future as large scale housing developments come forward. Therefore, there should be a focus on considering a new service delivery model to evolve or re-provide facilities, and additionally a delivery model which enables ground floor uses to be activated.

Enhance Access and Movement

- 5.42 At present, the key gateways into the town centre are predominately car-orientated and lead to expansive car parks. This is often the first impression visitors receive of the town centre, and it is visually unappealing and uninviting. As it can be challenging to re-organise the existing car parks, there could be a focus on improving the car park facades, so that they are more visually attractive. Additional parking provision will need to be made in order to meet

anticipated demand in the short to medium term, to facilitate access and support town centre activities. Movement can also be enhanced with better wayfinding, a consistent public realm, and developments which provide landmarks and enhance views.

Evolving Image and Identity

- 5.43 More could be done to define and communicate Horsham's identity as a modern market town. Due to Horsham's proximity to the High Weald AONB, the South Downs National Park and its market town heritage, there is an opportunity to invest in this image and create a new distinctive identity for Horsham. In order to achieve this, there should be reference to historic forms or materials within the town centre. Therefore, buildings, public realm and infrastructure could share graphic identity and aesthetics in retail frontages and signage should be encouraged. Additionally, there should be vigilance against extended blank facades, open service and storage areas, and service encroachment into public realm. A management team and a Business Improvement District could be put in place to promote the town, attract inward investment and to address specific town centre issues.
- 5.44 The development of an overarching Public Realm Strategy that addresses character spaces, linkages and gateways; connectivity and movement between spaces; wayfinding and signage coupled with a design guide would provide a comprehensive guide for future developments in order to preserve and enhance the historic environment.
- 5.45 Public consultation was carried by the Council out in May and June 2017. Survey responses showed significant levels of support for seven strategic directions.

6. Opportunity Areas and Key Development Sites

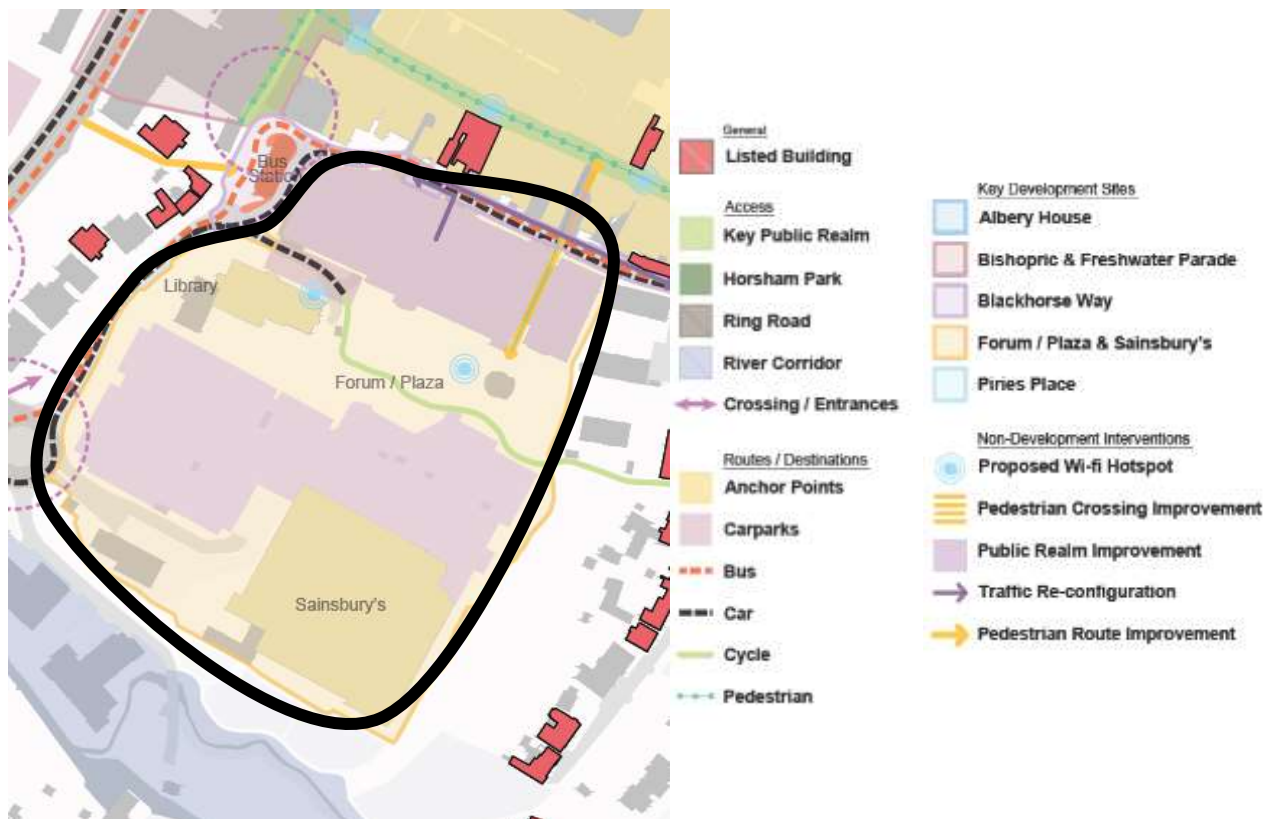
Town Centre Opportunity Areas

- 6.1 Taking into account the layout of the town centre, its current role and its relationship with the wider area, potential areas of opportunity where efforts could be focussed to strengthen Horsham's role and image are assessed below. The Opportunity Areas Plan, below, illustrates the location and extent of each opportunity area.

Figure 15: Town Centre Opportunity Areas



Black Horse Way, The Forum, Sainsbury's



- 6.2 Whilst high footfall at Forum Plaza suggests that the area is well used and that visitors are combining trips between Sainsbury's, The Forum and the retail core, the West Street/Forum link is very poor. The access is narrow and has poor visibility, contributing to a sense that this is the 'back' of the town. There may be opportunities to improve this link through acquisition of retail units or 'softer' approaches including lighting, surface and decorative improvements.
- 6.3 Blackhorse Way itself also suffers by being a back street, put to a variety of competing uses including servicing, informal car parking, refuse storage, car and bus access, and a pedestrian crossing. Site photographs illustrating this are provided below.

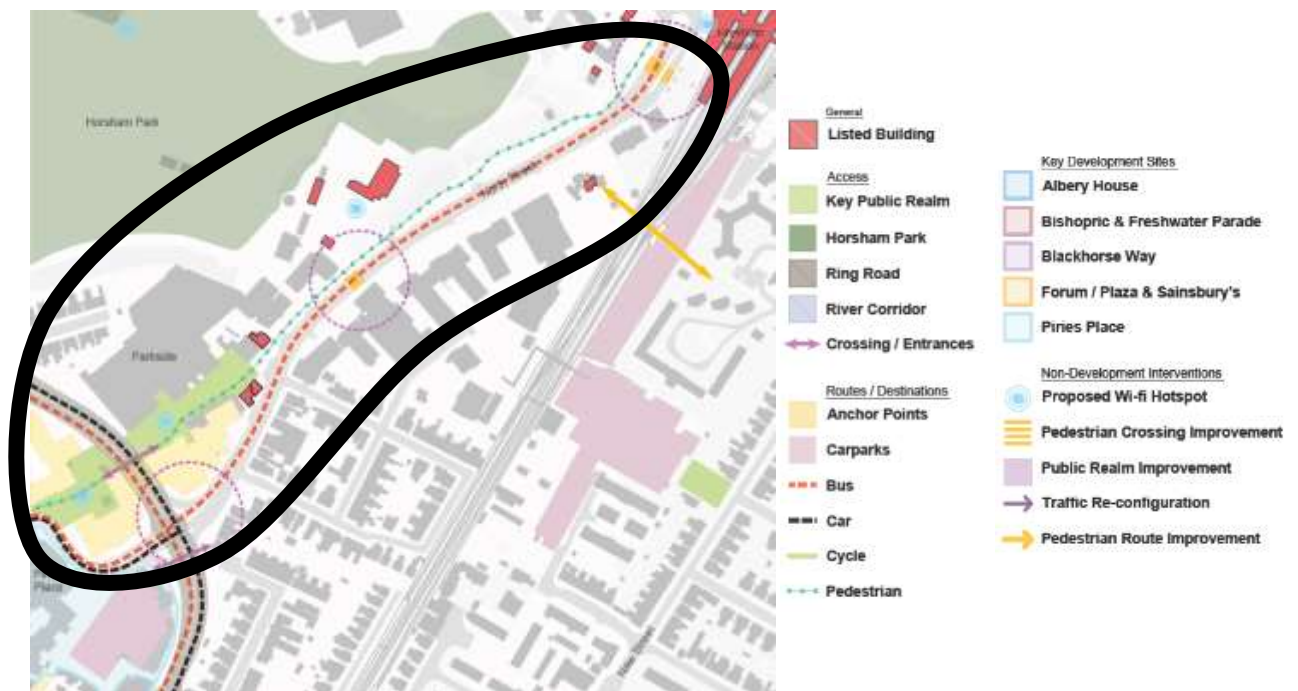


- 6.4 Efforts should be made to formalise and enforce refuse and servicing arrangements, and there may be an opportunity for traffic intervention to reduce traffic flows, improving the pedestrian experience as well as reducing congestion in the rest of the town centre, notably Carfax. This is assessed in greater detail in section 8.
- 6.5 There may be an opportunity to approach The Forum more comprehensively, to restructure the ground floor and improve routes through, to West Street and to Worthing Road and the bus station, and to reconfigure the retail units themselves. It is unlikely, however, that full

redevelopment would be viable or deliverable given the high latent value of the residential units.

- 6.6 This area also contains Sainsbury's and its car park, which is an inefficient use of space so close to the town centre. Opportunities to redevelop this car park should be investigated, which may or may not include the Sainsbury's store itself, the library and Forum Plaza. This could be an opportunity to introduce more housing into the town centre, meeting housing targets in a sustainable manner, or meeting identified retail floorspace need. Were the library to be included in a comprehensive solution, then there would be the potential to provide a replacement facility that expanded its role or combined with other service delivery, creating a stronger civic anchor for the town centre.

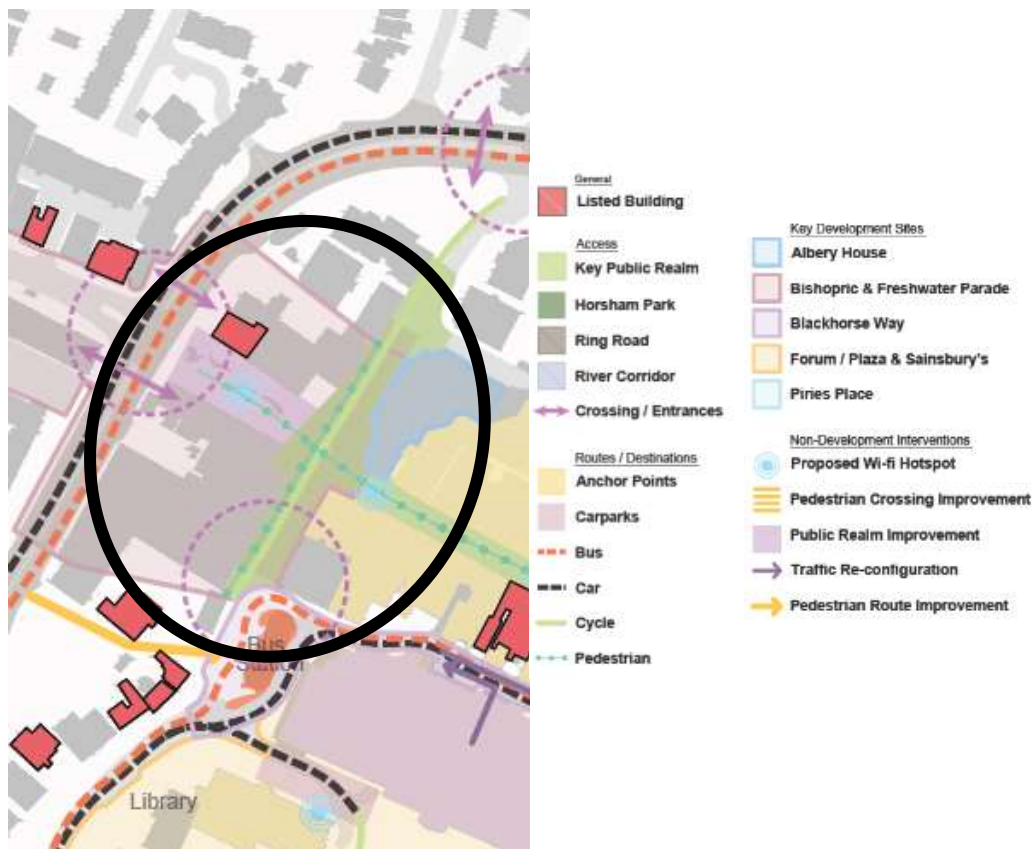
North Street – Station Quarter





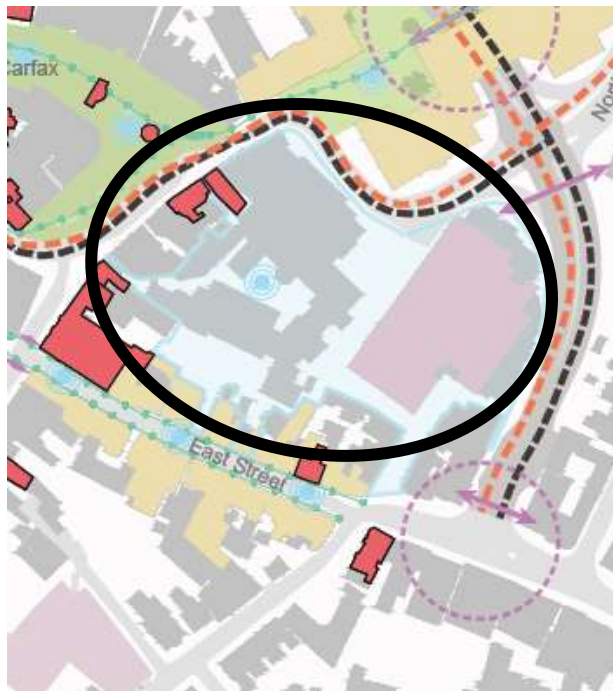
- 6.7 This area should remain relatively unchanged in land use terms. Focusing the office provision in this location would benefit local businesses that need to have direct access to the train station. In common with much of the town centre enhancements, the legibility of the public realm should be a key focus, ensuring employers in this area (or those accessing the town through it) can easily navigate to other parts of the town centre.
- 6.8 Future development in this area should seek to provide a new, more diverse, commercial offer to reflect the small business base within Horsham District and provide opportunities for residents attracted to new housing developments north of the town to start and grow businesses within the town centre. Other complementary uses, such as hotel provision, could also be a beneficial addition to this area, providing accommodation for business users, those seeking to be close to the station and wider 'leisure' visitors using the town as a base for exploring the surrounding countryside.

Freshwater Parade, Albery House, Worthing Road North



- 6.9 Though this end of the town centre has declined somewhat in recent times, the resulting lower property values present an opportunity for redevelopment or reconfiguration of the buildings and retail units in the location. The arrival of John Lewis at Home and Waitrose to the south west also has the potential to create linked trips and increase footfall, if better links can be forged between them and the rest of the town centre.
- 6.10 Efforts should be focussed in the first instance on improving wayfinding, the public realm and most importantly pedestrian crossings. The route directly to and from John Lewis is dealt with further below, but improvements could also be made to the existing crossing at Freshwater Parade, including the removal of barriers, and potentially the introduction of an additional crossing on the northern side of Bishopric. The Bishopric trees and planting beds also create a visual and physical barrier although the waterfall and stream counteract traffic noise to a degree.
- 6.11 The Bishopric, West Street, Worthing Road and Springfield Road meeting area should also be subject to comprehensive public realm improvement to visually connect the area to West Street and improve connectivity and legibility of the town centre.
- 6.12 With such improvements, proposals should come forwards in the area to repurpose the existing retail units, as indeed they already are in places, notably including Albery House. The Council should ensure that such proposals complement the public realm in terms of materials and built form, integrating this area into the wider town centre.
- 6.13 The Springfield Road area has some potential for redevelopment as the existing uses are relatively low rise in places, in the context of surrounding buildings and Albion Way, and this is a key route into town that is currently uninviting for pedestrians. Proposals in this location should focus on defining the street and establishing a visual connection between the town centre and Springfield Road, north of Albion Way. Proposals may include residential infill development, and/or employment uses.

Piries Place



- 6.14 Following the relocation of Waitrose, there is a risk that the centre of gravity of the town centre shifts to the west. Now is the opportunity for Piries Place to redefine and re-establish its role in the town centre through redevelopment.

REEF Estates Development

- 6.15 The Council granted planning permission on 15 March for redevelopment and conversion of Piries Place for a mix of uses comprising retail, cinema and hotel use together with proposals to



widen Copnall Way.

REEF Estates/ARCUS development proposals – Copnall Way Elevation – Artist's Impression

- 6.16 This proposal will redouble Piries' existing role as a leisure and evening destination, which would also complement the North Street/Station Quarter, and build on the success of the East Street cluster.

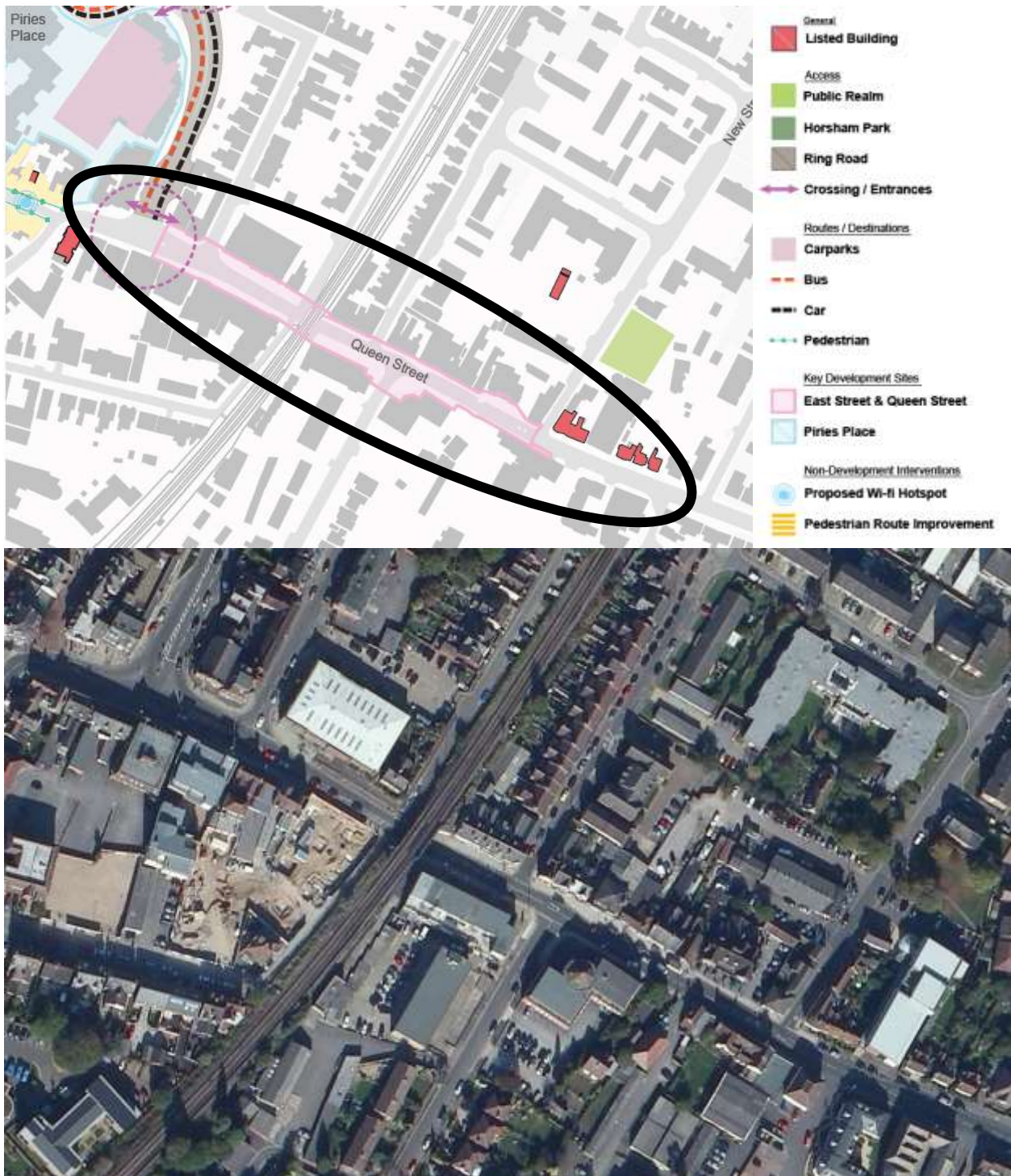
- 6.17 Redevelopment of Piries Place could potentially include the car park, either to expand provision as demand for spaces is likely to increase in years to come. Proposals should also seek to enhance the pedestrian arrival experience from the North Street/Station Quarter.

REEF Estates/ARCUS development proposals – Piries Place Courtyard - Artist's Impression



- 6.18 Given its existing strength, East Street is not included in this opportunity area, though the connections and wayfinding from here to other character areas could be enhanced, as could the sense of arrival from the north through the creation of gateway features.

Queen Street

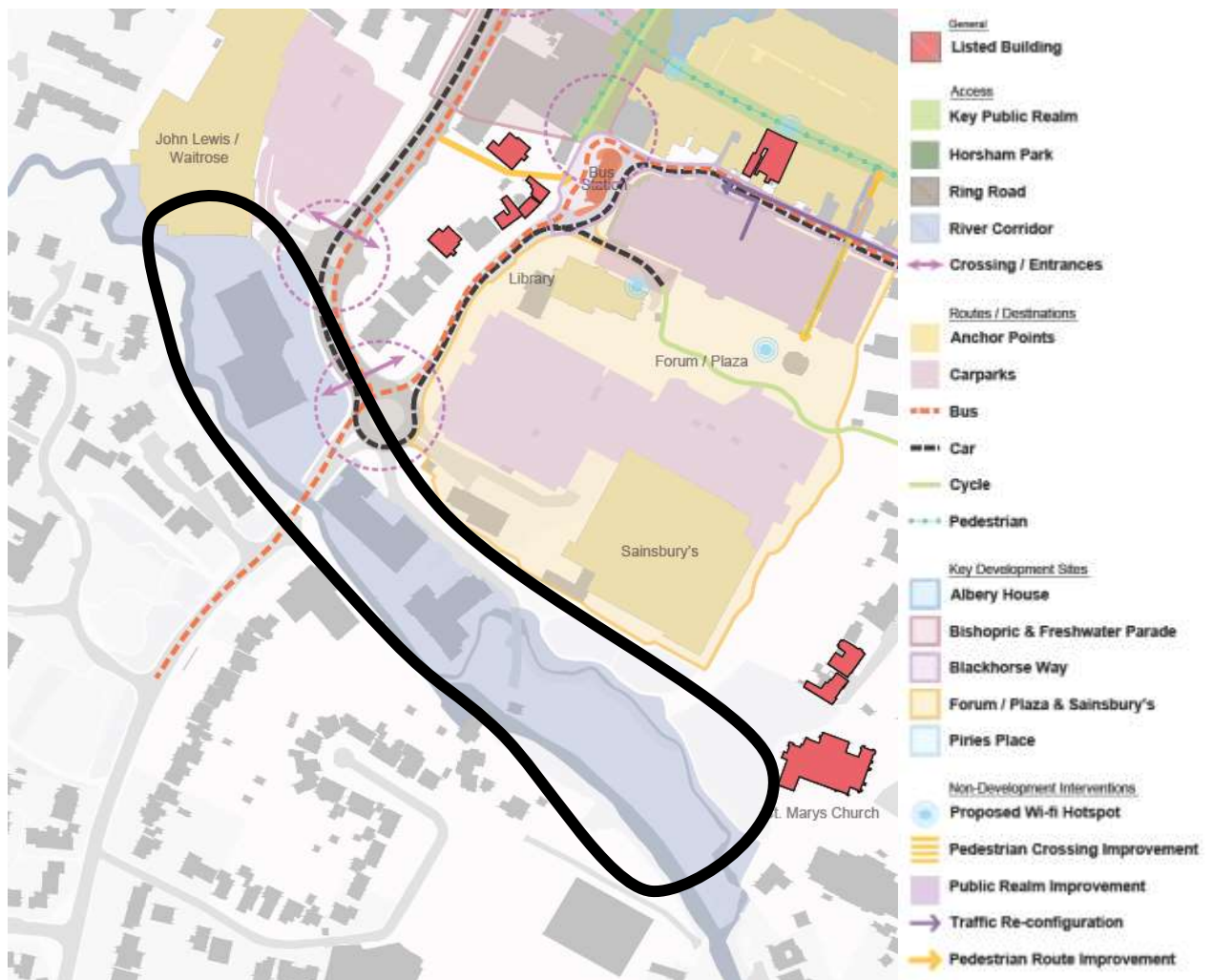


6.19 Though this is a secondary retail area in the context of the wider town centre that is entirely natural given its location. This role should be supported as it provides the potential for a greater provision of independents and alternative stores. Many of the existing buildings have character and much can be achieved through relatively straightforward frontage improvements. Similar initiatives have been successful at Leyton and Nunhead high streets in

London. This area could also have an identity distinct from the town centre, with consistent public realm features, detailing and public art to create an alternative sense of place.

- 6.20 Whilst Queen Street is likely to remain relatively separate from the town centre, and indeed this point of difference could be enhanced, the route between the two should nevertheless be improved to increase visits to Queen Street. The section of East Street immediately to east of the rail bridge features blank facades and inactive ground floor uses. There may be potential to redevelop in this location to improve the continuity of the retail frontage.

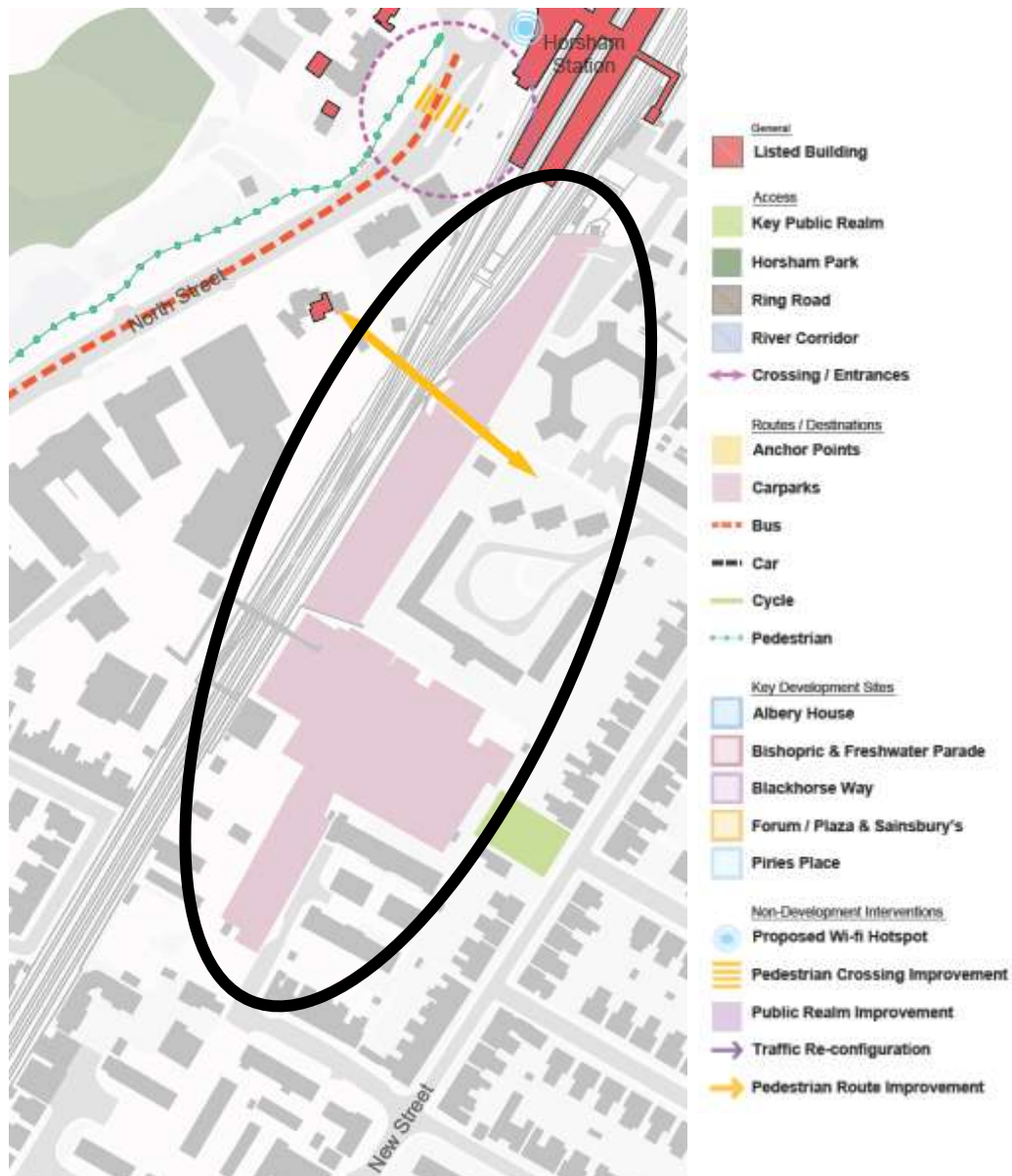
River Arun Corridor





- 6.21 A significant opportunity exists to better integrate the River Arun into the town centre, creating more usable, informal, green and blue spaces as part of the wider town centre offer and create a counter balance to the more formal leisure offer of Horsham Park.
- 6.22 There is the opportunity to enhance and integrate this corridor with Horsham Park via a new, high quality (and potentially greened) link broadly along the north south axis. This could run through The Causeway, Carfax and Medwin Walk and/or the footpath that runs to the east of Sainsbury's, the Forum, Blackhorse Way, Swan Walk and Medwin Walk and could provide a strategic pedestrian (and cycle) connection through the town to its urban hinterland.
- 6.23 Over the longer term there is the potential to create new residential-led developments along this corridor that make the most of the riverside setting. This would require the relocation of some office uses into other parts of the town so as to maximise the use of the river as a Town asset.
- 6.24 In relation to the Office Outlet and Currys units in Tanbridge Retail Park, whose leases are due for renewal within the next five years, there could be potential for reconfiguring and intensifying retail provision, given its setting adjacent to the new John Lewis store and its frontage onto Albion Way.

Royal Sun Alliance & Station Car Parks





- 6.25 The Station Car Park is located immediately to the south of Horsham railway station, and serves as the customer car park for the station. The car park is long stay, with prices charged for a minimum of a day at a time, and spaces available to be purchased on an annual basis. The car park is well used.
- 6.26 The RSA Car Park is located to the south of Horsham train station and immediately east of the railway lines. It is owned by the Royal Sun Alliance insurance company and managed and operated on its behalf by BMO Global Asset Management. It is used as staff parking by RSA for its offices at St Mark's Court. The car park includes a pedestrian link bridge over the railway to Chichester Terrace and North Street via The Capitol. This is a private link for RSA employees, with access restricted by pass card. It is understood that the car park is well used, and that RSA has no foreseeable intention to reduce its use of the land.

- 6.27 Despite being well used, the car parking is an inefficient use of space as it is all surface parking. There may therefore be opportunities to increase car parking provision for the current operators through the addition of deck or multi-storey parking, and/or introduce other forms of land use. Residential development may be appropriate in this location, given the predominantly residential setting. Whilst a number of offices are located near the station and one may expect that these sites could also accommodate offices, although their position to the east of the tracks may limit this.
- 6.28 Public parking provision could also be secured for the RSA car park through negotiation with RSA, however, given its existing ownership and exclusive use of the site. It may be possible, for example, to secure public access to the car park at evenings and weekends, but not working hours, depending on usage.
- 6.29 Any development would have to be mindful of traffic impacts given access from Station Road, New Street and adjacent residential streets. There may also be opportunities to improve access routes to the town centre through developer contributions.

Other Potential Interventions

- 6.30 There are a number of other potential interventions which are not area specific as follows:
- Whilst the retail core of the town centre functions well, enhancements around Swan Walk and Carfax could nevertheless be made, focussing on improving way finding through both enhanced signage and more coordinated (and better quality) public realm treatments. There are opportunities at Carfax to greatly improve the setting and prominence of the town's key heritage assets in creating an authentic sense of place. These include:
 - Reducing the proliferation of 'A Boards' in front of some units within the pedestrianised area between North Street and Medwin Walk, including 'ad hoc' directional signs for specific businesses;
 - Ensuring consistency and quality in the signage hung from wrought iron brackets on units at a high level throughout the area;
 - On-going repair of individual buildings to maintain the overall quality of the area;
 - Feature lighting schemes that highlight particular aspects of the historic assets could also greatly enhance the area in the evening to complement the range of restaurant and other evening economy uses;
 - Pedestrian Crossings over Albion Way should be reviewed for all the key gateways to the town centre. Currently, links between the town centre and Horsham Park are poor, which

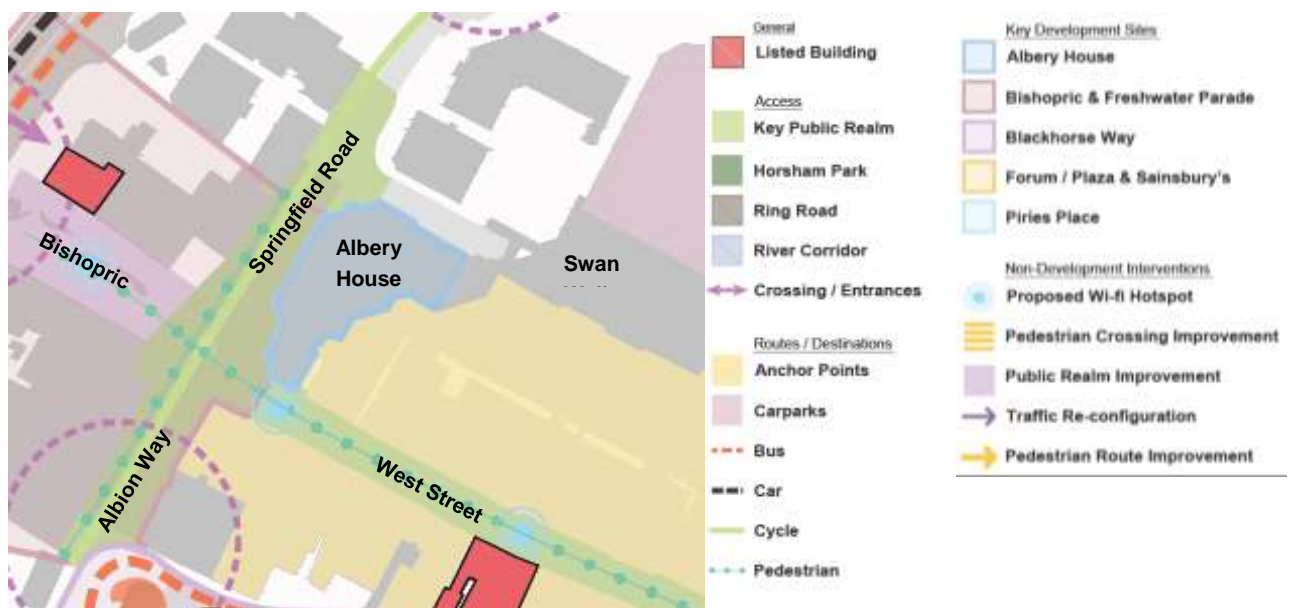
diminishes the potential mutual reinforcement between the two. There may be potential to improve existing crossings, and/or introduce new ones. More radical options may also be available, implementing traffic management measures or realignment to Albion Way. The potential for this should be investigated; and

- Besides the various public realm and signage improvements suggested for the town centre, other 'soft' improvements may include the provision of town centre Wi-Fi hotspots, or 'pop-up' stores. As the popularity of internet shopping continues, and as Horsham's catchment population shifts to include a greater proportion of younger residents, it is important that the town centre diversifies its role. Wi-Fi hotspots would be a relatively low cost addition which would increase dwell times. AVIVA, the owners of Swan Walk, are looking at this for the shopping centre. In addition, well-regarded markets are already established in the Carfax and this principle could be extended to other parts of the town centre, e.g. Freshwater Parade, and to a broader range of goods, e.g. street food, bars or clothing.

Town Centre Key Development Sites

- 6.31 Following the analysis of areas of opportunity within Horsham town centre, particular development sites with the potential to deliver some of the aims of this Vision have been identified. Each site is assessed in detail to establish the potential form and quantum of development which could be delivered.

Albery House/Western End of Swan Walk



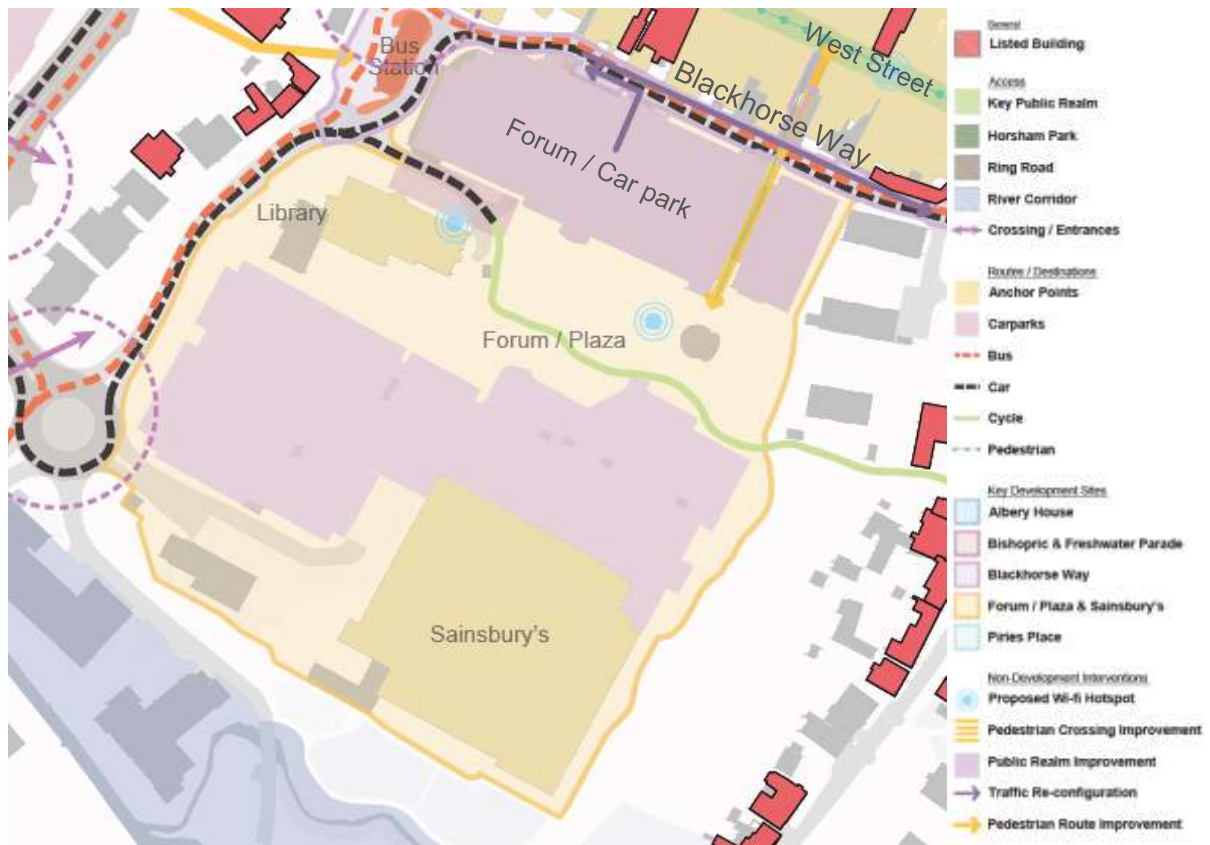
- 6.32 The western end of Swan Walk is within the identified Freshwater Parade, Bishopric, Springfield Road and Worthing Road North Opportunity Area. The western end is the worst performing part of the otherwise successful shopping centre, and the access through the centre, between Springfield and Worthing Roads and the Carfax, is poor. The necessary lifts and escalators are within the existing Wilkinson store rather than a shared mall environment, and overall the route is disjointed and meandering. The ground floor layout at Springfield Road also results in a long, blank façade.
- 6.33 The upper floors of the building form Albery House, which comprises office floorspace currently occupied by Trend (c 2,700sqm).
- 6.34 Aviva, the owners of Swan Walk, have recently obtained planning permission for the redevelopment of the whole building, comprising amalgamated retail units at first floor level, a multiplex cinema on the upper floors, and A3 restaurants at ground floor level facing West Street and Springfield Road with external dining areas with the resulting loss of the office accommodation.
- 6.35 The approved development is considered of benefit to the town centre. The cinema and leisure-retail combination will add to the evening economy and diversify the overall town centre offer. The proposals will also establish a much clearer, more direct route between Springfield Road and the Carfax through Swan Walk. There will also be a significant enhancement of active frontages in Springfield Road.



Visualisation of Aviva proposals, viewed from Bishopric

- 6.36 In order to maximise town centre benefits, however, the scheme should also contribute to local public realm enhancements, and there should be some visual consistency between this and other proposals nearby.
- 6.37 It is noted that the loss of 2,700 sqm of office floorspace is not insignificant, although this is not Grade A office space. Dependent on the conclusions of employment capacity studies in the coming years, it may be necessary to seek to replace this and other office floorspace lost through permitted development. Strategically the northeast corner of the town centre is the best location for new office floorspace and though there are no obvious current redevelopment sites, redevelopment of some of the buildings along North Street may be appropriate in time, as the buildings age.
- 6.38 The potential for the redevelopment or extension of Swan Walk more widely has also been considered. There is some potential for an upward extension of some stores, either into existing store areas or through additional storeys. However, aside from the structural considerations, it is considered that this form of development is unlikely to be viable. Upper floors of stores command less value than the primary frontage and therefore any enhancement is unlikely to cover the cost of such works. A more effective means of introducing larger store areas would potentially be to reconfigure and combine existing units. It is expected that Aviva will continually monitor the potential for such intervention as part of their asset management function, and hence such a change would be likely to come forward if viable, bearing in mind the lost income and potential compensation to tenants which this would entail.
- 6.39 There may be further opportunities to enhance the role of Swan Walk as a retail and leisure destination by encouraging complimentary restaurant and other leisure uses so enhancing the diversity and competitiveness of the town centre. While supportive of a diverse offer this should not be at the expense of Swan Walk's primary function as a comparative shopping destination.

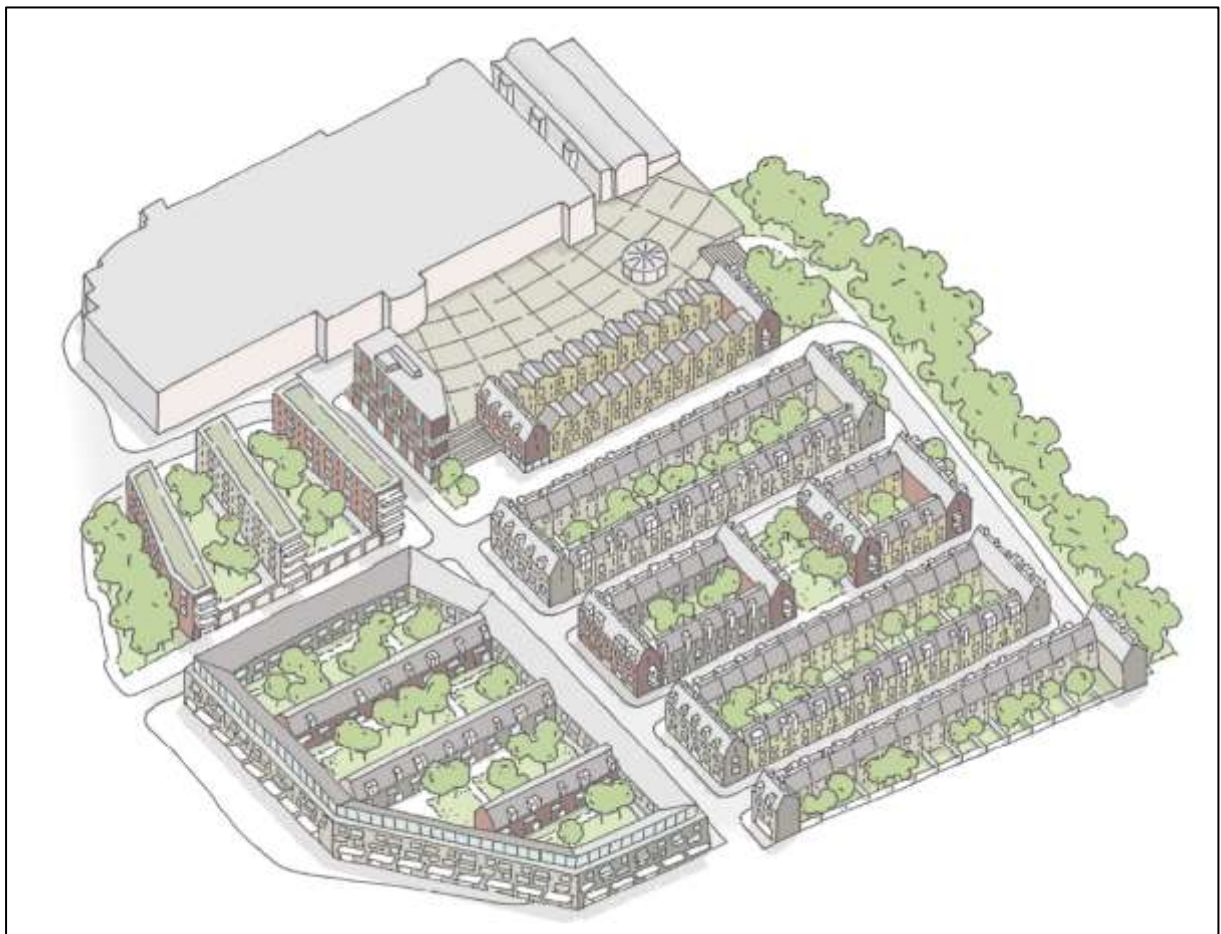
Black Horse Way / The Forum / Sainsbury's



- 6.40 This area is identified as an Opportunity Area due to its proximity to the retail core of the town centre and as in large part it represents an inefficient use of space. There is the potential for a comprehensive development approach in this location, combining the car park with the requisite re-provision of the Sainsbury's store, as well as redevelopment and re-provision of Horsham library.
- 6.41 While analysing the development potential to include the whole of the Forum it was considered that full redevelopment of this element would unlikely be viable. There is a high latent value in the building through a combination of the retail, residential and car parking uses. In addition, obtaining vacant possession of the residential units would be difficult and time consuming as well as costly. It would most likely require a Compulsory Purchase Order (CPO) to acquire the site and potentially re-provision of existing uses. There may be the potential, however, for reconfiguring parts of the ground floor retail provision to improve connectivity and visibility for pedestrians.
- 6.42 As part of the Council's wider asset management strategy they have just acquired the freehold interest of the Forum comprising the car park and four retail units - Dunelm, TK Maxx, Blacks and Benson for Beds.

- 6.43 The potential to include the bus station was also considered. However, the facility is considered to be ideally located for access to the town centre as it is. Moving the bus station is also likely to be costly, with relatively little balancing upside in terms of enhancing values, further impacting on the potential viability of comprehensive approaches.
- 6.44 The potential for redevelopment in this area has instead focussed on three main areas:
- South of Forum piazza (Phase 1);
 - Library and west of Forum piazza (Phase 2); and
 - Sainsbury's supermarket and car parking (Phases 3 and 4).
- 6.45 The area immediately to the south of the Forum piazza is considered suitable for residential and retail development. Development in this location would provide enclosure to the Forum, maintaining its quality as an attractive, open public area, but providing greater definition and shielding the piazza from wind. This development would also add to retail capacity in this central location, reinforcing the role of the core retail area and providing an opportunity to deliver more modern, larger units attractive to occupiers.
- 6.46 The library could be redeveloped for residential use, but also re-provision of the library itself in a modern facility, and potentially other community uses e.g. a GP surgery. The new block could meet the demands of a modern library in providing greater IT and study areas, and it could provide flexible space for local community groups, schools or businesses, including re-provision of the Citizens Advice Bureau.
- 6.47 If the redevelopment of the Sainsbury's store and car parking were considered appropriate, it could be divided into phases. The first would be the relocation of the existing store to a more prominent location at the southwest corner of the site. This could potentially provide a store larger than the current facility, and would also integrate multi-storey car parking within the same structure. Given the current trading position of the Sainsbury's store the option to develop the store and car park is not viable at this time and Phases 3 and 4 will not be progressed as part of the town centre Vision.

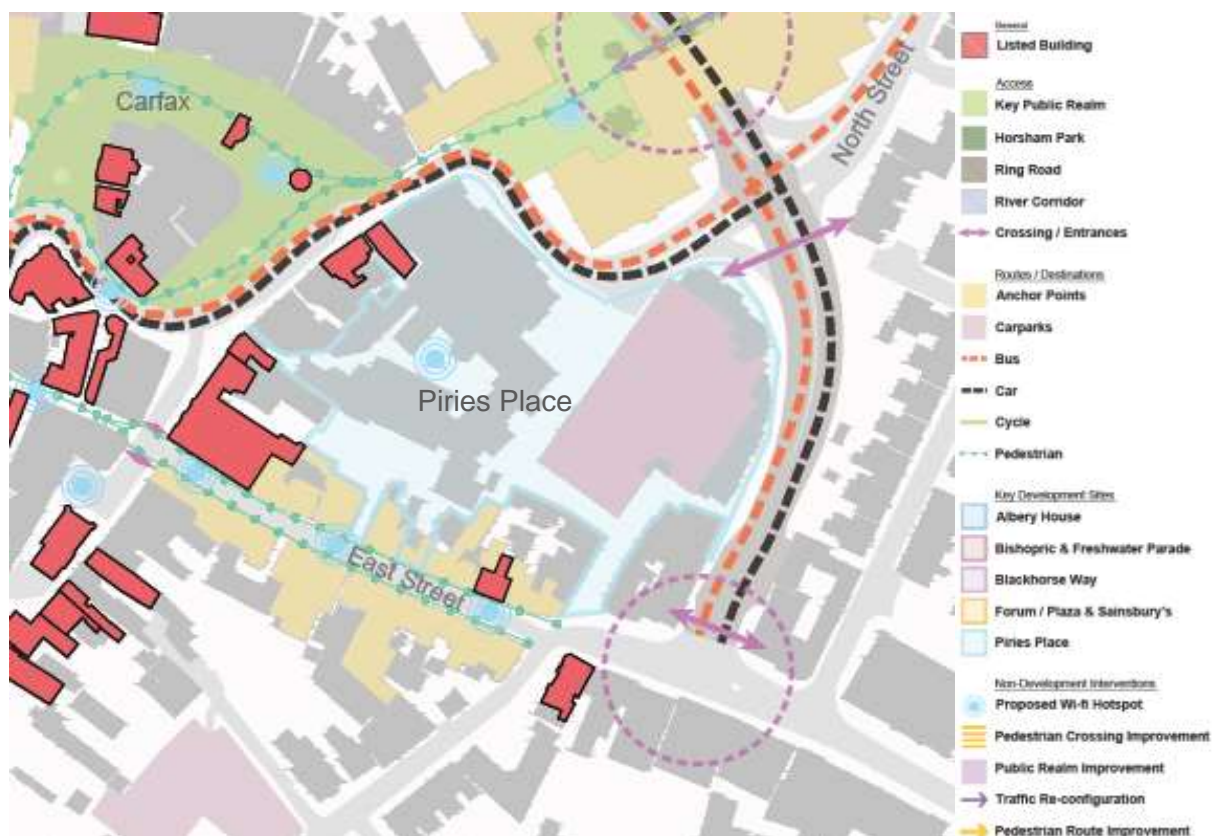
Phasing Plan



A sketch impression of how redevelopment the Forum, Library and Sainsbury's could look

- 6.48 The site also includes Black Horse Way. Potential interventions in this regard are primarily discussed in the preceding chapter. The potential to incorporate these changes with the wider redevelopment should be explored as there is the possibility of using the value created by the development to cross-subsidise some measures, e.g. the purchase of existing units to widen the West Street access, and visual improvements.
- 6.49 There is potential to introduce additional traffic measures along Blackhorse Way. Currently traffic exiting from the Forum car park must turn left back to Worthing Road. It is recommended that re-introducing one way traffic from west to east should be investigated. This would reduce town centre traffic flows, and improve pedestrian safety at the crossing between West Street and the Forum. Further than this, it may be possible to restrict traffic west of the car park to bus-only (except for servicing) at some times of day. This could further reduce traffic flows over West Street and through Carfax, enhancing pedestrian priority in these spaces. It may also improve bus journey times. Detailed traffic modelling would be required to confirm the feasibility of these approaches.

Piries Place



- 6.50 As an Opportunity Area, leisure, hotel, office, residential and retail were all identified as potentially acceptable uses in this location. A development scheme has recently received

planning permission at this site, for a mix of flexible retail, restaurant, refurbished office, hotel and cinema uses.

- 6.51 The scheme proposes to redevelop the vacant unit previously occupied by Waitrose, refurbish a number of existing retail units, introduce a new build hotel, open up the central square including with better access, and improve the public realm including with new paving and street furniture.



- 6.52 This scheme is considered positive for the town centre in that it is bringing a major vacant unit back into use and introducing new uses at the eastern end of town, where there may otherwise be a danger of stagnation. The retail units proposed are generally more substantial than others in the town centre, diversifying occupier choice. The introduction of the hotel also helps to meet the need identified in earlier sections, and this is considered a suitable location for this use in the context of the wider town centre.

- 6.53 The cinema is intended to be operated by Everyman, and will have 3 screens. This is considered to be a different offer from the proposed multiplex cinema at the western end of Swan Walk. Recent survey work undertaken as part of the Horsham Town Retail & Leisure Study 2016 also confirms that much of the potential local cinema trade it lost to other centres,

particularly Crawley. As such, it is considered that there is room for both of these cinemas in the town centre. The Council will, however, need to consider the potential impact on the Capitol Theatre. Whilst new film screenings are only a part of the programming at the Capitol, Everyman itself offers more than just new blockbuster releases, and there will inevitably be an element of competition. The Council should carefully review The Capitol's cultural offer to diversify and broaden its appeal.

- 6.54 In terms of office floorspace, overall the scheme represents essentially a re-provision of existing space, some of which will have flexibility for other uses, albeit all the space will be refurbished. Due to its proximity to the North Street/Station Quarter, this site could offer potential for a greater provision of employment space, particularly flexible working space. The site may also have offered the opportunity to provide town centre residential units. It is acknowledged, however, that there is a limit to the number of different uses that could feasibly all be promoted.
- 6.55 As with proposals at Albery House, care must be taken to ensure that this scheme integrates well into the town centre. Access between Piries Place and the Carfax, Copnall Way and East Street should be enhanced and made clearly legible, and materials and massing should not detract from the overall historic character of the town centre.
- 6.56 The proposals do not include the Council-owned Piries Place car park. The Council is investigating the potential to reconfigure this car park (to meet modern space requirements) and also to add additional decks to increase capacity to meet future demand forecasts.
- 6.57 There is the potential to do more with the car park, e.g. add residential development either at the top of the structure or around the outside. However, such development would be something of a compromise with uses which would be unlikely to sit comfortably together. There are also likely to be structural issues which it would be expensive to resolve. If alternative uses were to be proposed for the car park, a comprehensive redevelopment solution would be more likely to be successful. This would, however, likely result in the loss of car parking, whereas the opposite is projected to be required.

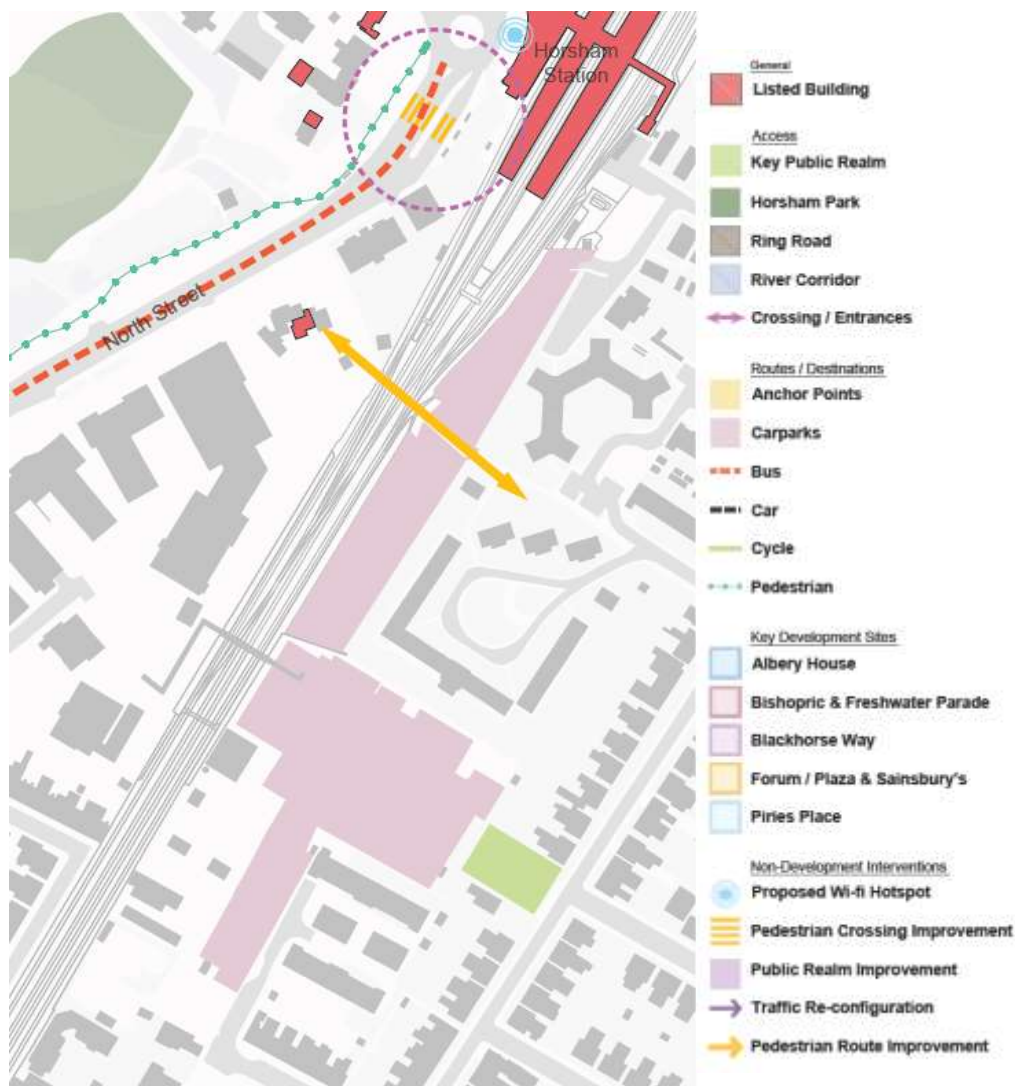
Office Outlet / Currys



- 6.58 The siting and context of this plot would lend itself to further retail development, especially following the arrival of John Lewis and the prominent nature of the site. It is understood that the current leases expire in less than five years which could lend itself to redevelopment at that point.
- 6.59 Having assessed the site, it is considered that redevelopment would not comprise greater plot coverage than is currently the case, as it is a constrained site. However, there is potential to introduce 2-storey development in the place of the current 1-storey buildings. This could provide modern, double-height with mezzanine retail space, which could provide for an increase of c 1,640sqm net retail floorspace. The current buildings are single storey and sit on lower ground adjacent to the river Arun and screened by mature trees.
- 6.60 Such space would typically be attractive to occupiers who are comfortable in both in-town and out-of-town locations with flexible formats. These include major clothing and craft occupiers such as Next, TK Maxx and Hobbycraft. This is likely to be an attractive pitch for these occupiers, and could assist in attracting them to this town centre location as opposed to out-of-town pitches and adding to the overall Town Centre retail offer.
- 6.61 It will be important to ensure that sufficient car parking and servicing arrangements are available at the site, hence the assumed consistent site coverage. There may be an

opportunity to utilise the levels of the site to increase parking provision. The site slopes significantly downwards from north to south, and therefore it may be possible to construct part of the southern portion of the redevelopment over a podium, with parking beneath. It is estimated c 25 additional spaces could be provided in this manner. This will increase the construction cost of the development to some extent, but should also enhance value. The increased provision would also result in a net increase of car parking in the town centre, though increase the overall storey height of the southern part of the scheme.

Royal Sun Alliance and Station Car Parks



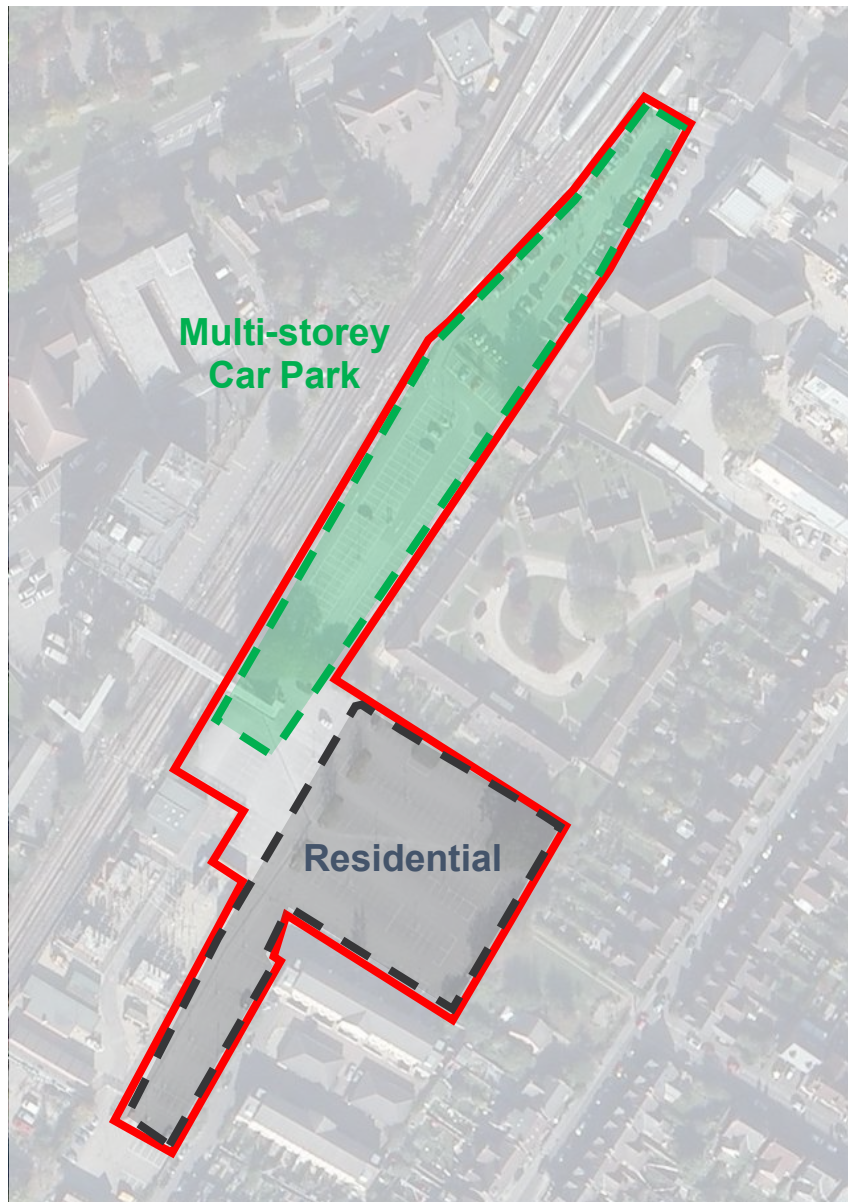
- 6.62 In assessing the RSA car park portion of the site, this may be suitable for part residential redevelopment, with the addition of multi-storey parking to the remainder to re-provide the spaces lost. Discussions with RSA confirm that it would require at least the retention of the current number of spaces in order to release part of the site for redevelopment. Through the

development of a 3 storey car park element at the west of the site, it should be possible to replace car parking spaces lost through redevelopment of the east of the site, approximately 145 spaces, resulting in no net loss of spaces. These areas are illustrated in the plan below:



- 6.63 Development of the site in this manner would require the provision of additional access. The site is currently accessed only from the south, via Victoria Street. There is land, owned by the Council, which RSA already enjoys a right of way over, to the east of the site. If this could be included in the site then this could provide separate access to the site, opposite Devonshire Road. Residential development would not be practicable in the absence of this separate access.

- 6.64 Alternatively, a scheme to increase car parking provision alone, thereby potentially making parking available for general public use, may be deliverable on the RSA car park site, allowing for provision for public use. This is not considered to be re-development per se, but would require negotiation of access and terms of use to be delivered.
- 6.65 The size and shape of the site does not appear to allow for all potential aspirations for the RSA site to be delivered together. RSA themselves require the retention of the same number of spaces; with this constraint, the site could either be part developed for residential use with a multi-storey added to the remainder to preserve RSA's spaces, or be used to intensify the car parking use for a net gain of spaces, potentially opened up for the public, but not both.
- 6.66 Considering the station car park, it may be possible to promote part of this site for residential development. However, the layout of the site does not appear to lend itself to being able to accommodate residential development and to maintain the present number of car parking spaces through addition of a multi-storey. It would not be suitable for residential development in the northern section given this would isolate the remaining car parking from the station. However, the northern section does not appear to be of sufficient size to provide for replacement of lost space if the southern section were to be developed for residential use.
- 6.67 When considering the RSA car park and the station car park in combination, the site can be treated more flexibly. A greater proportion of the RSA car park is likely to be capable of residential development, potentially not having to rely on the provision of access through the park area, is a multi-storey could be built over all of the station car park and part of the RSA car park. This is illustrated below. Combining the two sites in this manner will require the agreement of both landowners, and arrangements between them for joint use of the car park would be required.



7. Steps to Delivery

- 7.1 This chapter summarises approaches to deliver the proposals presented in this report. It deals firstly with specific sites where development proposals may come forwards. This is followed by other areas of potential future development focus and non-development interventions, and concludes with more general town centre improvements.

Key Development Sites

- 7.2 Delivery approaches for the Key Development Sites identified in previous chapters are discussed below. Where there are already proposals by private developers for a site, i.e. Albery House and Piries Place, delivery approaches are not considered. Section 6 does, however, include discussion of how these schemes should be integrated into the town centre.

Black Horse Way / The Forum / Sainsbury's

- 7.3 Proposals for this site necessarily require the agreement of Sainsbury's in order to progress. Though the scheme is divided into a number of phases, any one of these would require the cooperation of Sainsbury's to be promoted, given Sainsbury's is the freeholder of the entire site, including beneath the Forum piazza. As such, early and continued engagement with Sainsbury's is required.
- 7.4 Any scheme involving significant disruption to the Sainsbury's store is unlikely to be viable, given its strong trading position. Phases 1, 2 and 4 are viable in themselves, and there is some potential to promote schemes including these elements in these locations, but it would need to be undertaken in a manner with minimal disruption to the food store. Phases 3 and 4 are therefore unlikely to be progressed, but there is the potential to undertake Phases 1 and 2 in isolation.
- 7.5 Undertaking phases 1 and 2 would still require the agreement of Sainsbury's. However, this could be forthcoming given the development could be undertaken with minimal disruption to the food store, given construction access could be from Worthing Road. The disruption would likely comprise temporary loss of access to car parking spaces beneath the Forum piazza, and reduced pedestrian access between the food store and the town centre/West Street. Careful construction management and phasing could, however, preserve alternative pedestrian access routes. Phases 1 and 2 in isolation generate a development surplus, some of which could be used to compensate Sainsbury's and other local stores for this disruption.

- 7.6 To progress Phases 1 and 2, engagement should be held with Sainsbury's and West Sussex County Council (WSCC) to understand any concerns it may have, and legal and structural due diligence checks should be undertaken to understand the feasibility of undertaking development on the Forum piazza, including reference to the existing ownership structure and the nature of any rights parties may hold. The relative rights and interests held by the parties have not been reviewed as part of this study but it is understood that Sainsbury's owns the car park beneath the Forum and the Council owns the piazza, presumably on a leasehold basis, and WSCC owns the library freehold.
- 7.7 Sainsbury's' interest in the parking area south of the piazza could potentially be purchased for the development at market value. Development above/on the piazza may, however, require amendments to the existing ownership documents, e.g. amendments to leases to enable development. Again, there may be a cost associated with this.
- 7.8 The interest of WSCC could be dealt with through a sale and leaseback of land where the current and new libraries will be sited. Alternatively, it may be possible to form a Memorandum of Understanding between WSCC and Horsham District Council to jointly promote the development.
- 7.9 Following this, the Council can engage in soft market testing, informally at first with reference to forming ideas, and then more formally with worked up designs before putting the proposals to market. This can be undertaken simply by telephone or informal meeting, and then through a more formal process of questionnaire and written response. As these phases are not straightforward residential-only proposals, it will be important to establish a list of relevant developers who are likely to be interested in the opportunity before starting the process. If possible this should comprise both local and national organisations to ensure a broad range of views is taken into consideration.
- 7.10 Reviewing the results of the recently completed Horsham Town Centre Retail and Leisure Study (2017), and its identification of retail floorspace need in the town centre, there may be the potential for an alternative approach for the Sainsbury's car park site, i.e. the areas comprising Phases 3 and 4 of the residential-led scheme. It may be possible to promote an alternative retail-led scheme in this location. This could comprise a deck over the existing car park, preserving the existing number of spaces, with new retail frontage above, along the key pedestrian route between Sainsbury's and West Street.
- 7.11 This could potentially help to meet some of Horsham's anticipated future retail floorspace capacity, and would not entail the moving of the existing Sainsbury's store. There would still be disruption to the store, but not on the same scale as currently envisaged. Such a scheme

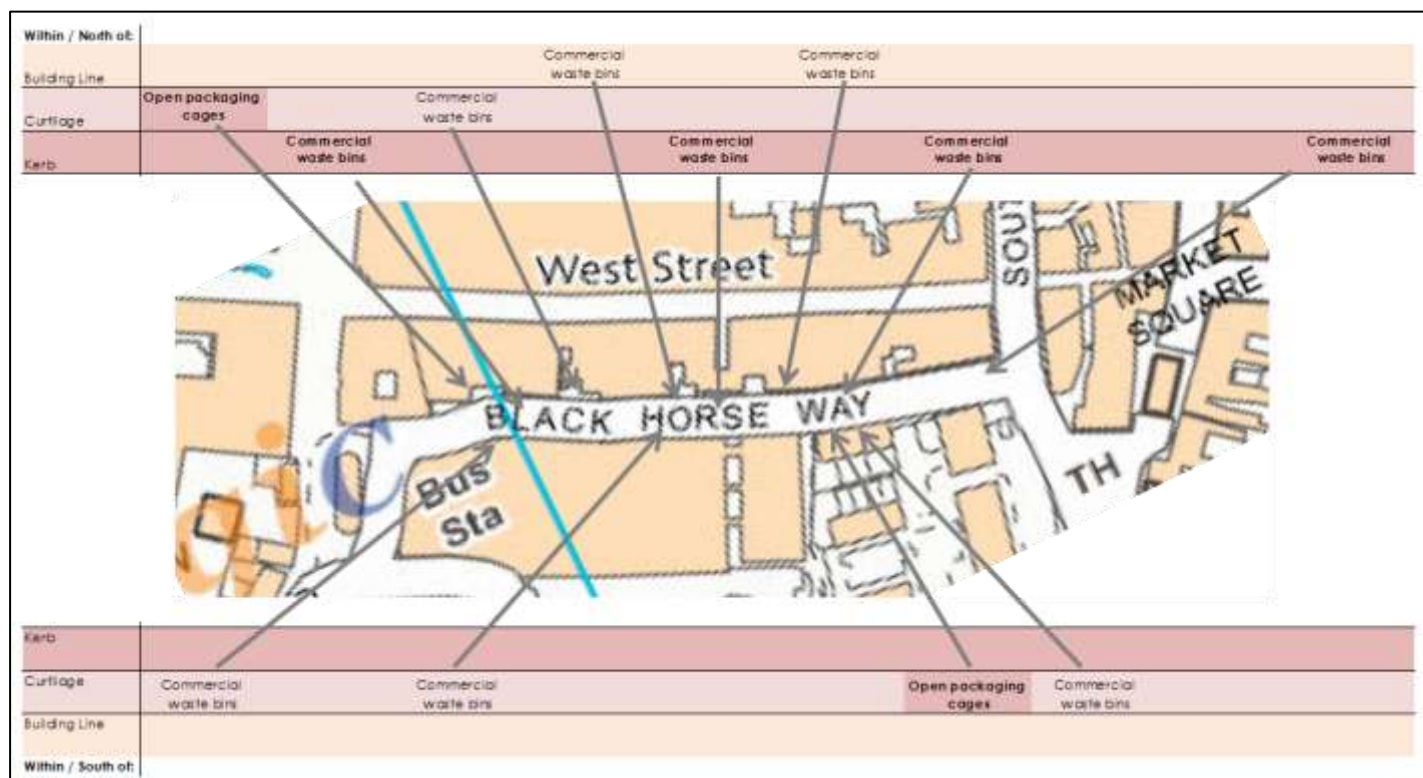
could also feasibly comprise some flatted residential development to help meet some of Horsham's housing need. It is noted that the overall density/scale of the development would be greater than currently envisaged, but given retail floorspace requirements it may be appropriate for this town centre site to include a greater proportion of retail than proposed under the residential-led approach.

- 7.12 The potential for this and other alternatives on this part of the site could be considered whilst still promoting Phases 1 and 2, as development of the earlier portion would not prejudice that of the latter, though it is important that key routes are preserved.
- 7.13 It should be noted that, whilst there may be significant viability issues with the development of the Sainsbury's store itself, the food retail sector changes rapidly, and the current overtrading Sainsbury's store may not continue indefinitely in its current form. It is feasible that in the future, with changes to the sector, demand for large format food stores may fall, and hence the preceding analysis could change significantly. This should be kept under periodic review.

Black Horse Way

- 7.14 A number of issues have been identified with Black Horse Way, with the combined effect that this street detracts from the town centre. Waste storage in the street is spread across both sides, including in open containers and not within defined areas. There is also a lot of informal car parking. The street is also used for servicing, provides access to the Forum car park, has numerous bus routes along it and provides general vehicular access to the Carfax and Causeway. There is also a pedestrian crossing between West Street and the Forum, which is the primary route through to Sainsbury's, but is cramped and offers poor visibility of oncoming traffic.
- 7.15 In terms of waste management, the exiting situation is summarised in the plan below:

Figure 16: Blackhorse Way Waste Analysis



- 7.16 The response to this should primarily be one of enforcement, to ensure that all traders store refuse within their curtilage only. In addition, all waste should be stored within closed bins and not in open containers including packaging cages. Enforcement could simply be by way of engagement with nearby occupiers in the first instance, to draw attention to the Council's wish to improve the situation. Only if the situation persists would more punitive measures be considered.
- 7.17 Enforcement in this manner would also seek to restrict the use of the street for car parking. Occupiers could feasibly continue to park within their respective curtilages but not if this would have a knock-on impact on refuse, and parking cannot occur on public areas. Stricter parking enforcement could rectify this latter point.
- 7.18 Should issues persist, the Council may want to consider intervening more directly by installing bin store boxes and fences. This could clearly demarcate areas intended for refuse as distinct from the remainder of the street. Numerous storage fences/boxes would also offer the opportunity to introduce coordinated street furniture design and colour along the street. Some public funding may be required to provide for this. Stores could be located where bins are already placed, but have partitions added to separate and screen the bins. There is also

the potential opportunity to introduce new stores through the acquisition of currently vacant retail units.

- 7.19 There may also be benefits to introducing street decoration more widely, including introducing murals to blank facades or banners to street lighting. This would have the effect of brightening the street aesthetic and diverting the eye away from street level.
- 7.20 Regarding the pedestrian crossing, the route is along a narrow passage from West Street, which includes a number of heritage assets, and so alteration to this is unlikely. Towards the end of this passage, however, is a more modern retail unit, which could feasibly be altered to widen the route at the point it meets the crossing. This would require the purchase of the unit; engagement with the owner should take place as a starting point to determine the potential for this. Negotiation could then commence regarding the purchase, which the Council would need to secure funding for via a business case.
- 7.21 The route could also benefit from improved lighting, potentially to include feature lighting along the internal wall north of Black Horse Way, and new paving. A shared surface could be laid for pavement and the crossing itself, to encourage slow driving and reinforce the sense of pedestrian-primacy.
- 7.22 Finally, traffic could be reduced on Black Horse Way by making it part one-way. If two-way traffic were only permitted up to the entrance to the Forum car park, from Worthing Road. Traffic from the other direction, from Carfax, could be limited to the junction with Hewells Court and not allowed further. The combined effect of this would be to reduce traffic flows at the point of the pedestrian crossing, again further strengthening the impression of this as a key walking route. These changes would also enable the width of the road between the Forum car park and Hewells Court to be reduced. This would provide more space for formalised parking and refuse storage, and the potential for wider pavement space and potentially even some street planting. Implementing this would require traffic modelling in the first instance, but would be relatively straightforward to introduce through new road signage.
- 7.23 A sketch impression of how Black Horse Way could look with these improvements is provided below.



- 7.24 The overall effect of these changes would be to improve the impression of the street. This is a key, well-used pedestrian route which currently detracts from the overall historic, market town impression of Horsham that a visitor may otherwise have. Improving the view and feel of the street as experienced from the north-south pedestrian route would be of significant benefit.

Office Outlet / Currys

- 7.25 Whilst an improved retail offer in this location is likely to be attractive to occupiers, the scope for increased density is limited and it is therefore unlikely that the site has very significant redevelopment value. For that reason, it is perhaps more likely that such a scheme could be delivered by the existing owner, rather than a third party.
- 7.26 The exiting occupational leasehold interests are due to expire in June 2022. This suggests that this scheme would most likely come forward at this time, rather than before. There would, however, be the potential for earlier development depending on changes in the occupier market, e.g. the changes that are currently taking place in respect of Office Outlet, which could feasibly drive consolidation on the part of the existing occupiers. Earlier development also becomes more likely the closer one gets to lease expiry, as the latent value in those leases falls.
- 7.27 Our analysis does suggest, however, that a rational owner may at that time seek to renew leases or re-let, rather than redevelop. Clearly this will depend entirely on the nature of the occupier market at the time, and this should be kept under review. Retail trends are

developing at a pace, and as a result there may be opportune times to engage with the landowner before the lease expires, or it may be preferable to wait.

- 7.28 Fundamentally, the location and the prominence of the site should make retail intensification an attractive development option. Should the Council wish to incentivise continued retail use, therefore, engagement should be held to this effect. The Council may also wish to consider the use of planning policy to secure this, through allocation of the site for retail use and extension of town centre and retail frontage boundaries.

Royal Sun Alliance and Station Car Park

- 7.29 There may be viability challenges with the development of these sites for residential use, whilst also retaining the existing number of car parking spaces through the development of multi-storey car parks. There are a number of potential options to address this. The most simple would be for the Council to provide public funding to meet any shortfall. However, it may be difficult to justify a business case for this, given there is no direct benefit to the Council, and there may be state aid implications.
- 7.30 One of the schemes envisaged in this report assumes alternative access is available to enable the residential development of the RSA car park, through the parcel of land to the east of the site, between the car park and New Street. This land is in the Council's ownership. There is already some form of right of access over this land held by RSA. However, this would need to be modified to enable the residential development, or preferably the land sold into the scheme. The Council therefore has a potential stake in the promotion of this site, which could form part of negotiations with RSA. It would appear, however, that values would need to rise for this to be attractive to RSA.
- 7.31 Whether or not residential development is promoted, there is also the potential for the car parking at this site to be opened up for public use. Feasibly this could be at defined times at evenings and weekends, when one would expect the car park is less well used by RSA staff. This arrangement could potentially be relatively straightforward to implement, with the agreement of RSA. Discussions would be required to agree an approach, but feasibly an agreement could be struck whereby RSA allowed public access at given times, including use of the footbridge, and in return receive income from charging for the service. This may require some upfront investment, but would not require the direct participation of or contracting with the Council. This would provide an increase in public parking, at given times, of about 350 spaces, i.e. the full extent of the existing car park.
- 7.32 As an alternative to residential development, the Council may prefer to focus on car parking at this site, not only increasing public provision by arranging for public access, but by

intensifying the use by adding a deck to increase car parking spaces. To facilitate this, one would envisage an agreement whereby the Council constructed additional decked parking (through a contractor) and took a lease from RSA of the new spaces. This would leave the original spaces to be used by RSA, so it had no net loss, with public provision introduced with the new spaces. The agreement would need to provide for the construction period, perhaps through a building licence, and would need to provide for public access over common parts. Public access would also be required over the footbridge to make this a more attractive car park for users seeking to visit the town centre. This approach could provide approximately 150 public spaces on one deck.

- 7.33 The advantage of this approach would be that in theory the Council could own (via long lease) and operate the public element, and receive the income for it. The downside is that this would require significantly more upfront investment, including funding the construction cost of the deck element, as well as compensating RSA for the disruption including temporary loss of spaces and on-going sharing of the site, which may be more significant given RSA would not have the benefit of the public car parking income.
- 7.34 The Council should consider whether it wishes to prioritise housing delivery or increased public parking provision at this site. With a decision made, the Council should then liaise with RSA further regarding its preferences and potentially to negotiate potential compensation, depending on the option taken up.
- 7.35 It remains to be determined which of the parties would lead in promoting the site should an option including some form of development be preferred. Should the residential-led option be preferred, it may be possible simply to advertise that part of the site for sale, given this element is relatively straightforward residential development. Separate access would be required to do this, and some form of planning brief or planning allocation may be useful, though not essential. The proceeds from this sale could be used to fund the car park construction separately.
- 7.36 An alternative to the RSA car park site development is the joint development of the RSA and station car parks. In order to facilitate this option, firstly engagement should be undertaken with the landowners to explore the potential for a shared car parking facility between them. This will clearly carry issues relating to securing and use, but with good management it should not be difficult to arrange.
- 7.37 One can envisage a simple division of spaces between the two uses, with the use of card access or similar for the RSA portion, or a more dynamic management regime where the share of spaces could flex in response to relative demand from RSA staff and station

customers. This latter approach may allow for greater public use of the RSA spaces, effectively increasing public car parking in the town. The opportunity could also be taken to improve pedestrian links to the town centre, either through the pedestrian underpass in the station car park, or through the RSA bridge access, or both.

- 7.38 If parties would potentially be amenable to such an arrangement, then the next step beyond agreement in principle would be to establish likely car park usage, both in terms of quantum of spaces needed and the likely distribution of demand between the two groups of users at different times. This would establish the potential for dynamic use of the car parks, or otherwise that spaces would need to be permanently allocated for one use or the other. With that established, designs could then be worked up to reflect the intended use of the car park.

Areas of Focus

- 7.39 Some parts of the town centre have been identified as areas where improvements or interventions could be focussed, but where there are no clear discrete development sites at the present time. Below each are discussed in turn, including the form of future development that would be beneficial in each case as sites become available, and other non-development interventions that could be implemented.

Civic Quarter

- 7.40 The Civic Quarter has been identified as an area where office use is already well established, and where it should remain as the strategically logical location for the town centre, being situated on the fringe of the core town centre, on the railway station side.
- 7.41 Some conversion of offices to residential use has already occurred and one would anticipate that this will continue as lease terms expire in the future. It will be important to try to resist this change, in order to preserve employment use in this strategic location, and more generally in the town centre, as commercial uses provide knock-on benefits for town centre activity. The Council is limited in its ability to resist residential conversions due to the permitted development rights regime, which allows conversion without planning permission.
- 7.42 However, one issue which the Council can still consider and use to refuse conversion, if appropriate, is traffic impacts. It is therefore important that the Council has robust traffic modelling for this area, which is kept regularly updated, to provide an evidence base for any resistance to conversion applications, should there be genuine concerns.
- 7.43 The Council may also have a softer role in engaging with existing owners and occupiers of the commercial premises in this area, to understand remaining lease terms, intentions on expiry,

and should an occupier be forced to relocate, the potential to retain that occupier within the town. This could take the form of direct liaison, but also through questionnaires and engagement workshops. It will be important to understand what measures may convince owners and occupiers to retain employment use and operations in the town. The Council could also engage with local business groups, including in assisting in cross-industry networking and knowledge-sharing, particularly for the businesses in the Civic Quarter, encouraging on-going participation.

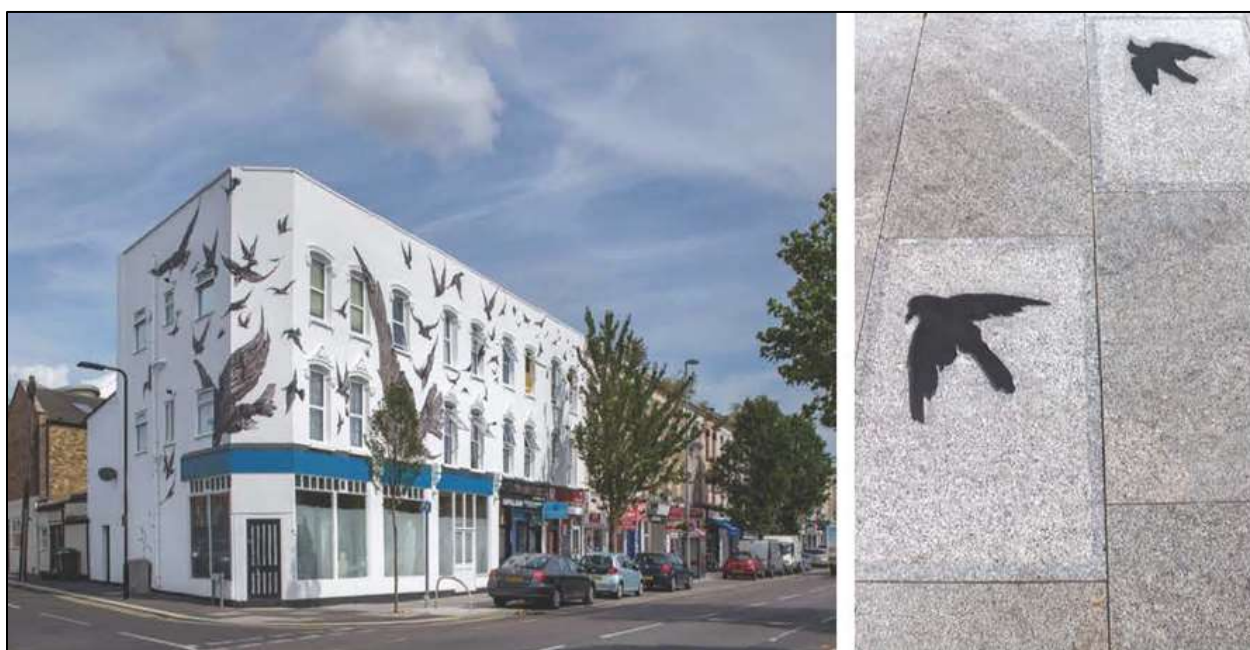
- 7.44 Through the planning policy process, the Council could also seek to allocate this area as one where commercial uses take precedence, to encourage new commercial development where possible, and discourage residential conversion where a full planning application is required, and hence full planning consideration can be applied. This should encourage new, flexible workspace offerings to provide for SMEs and modern ways of working, including start-up incubator space, potentially looking favourably on the promotion of such schemes even where there is a small net loss in office floorspace.

Queen Street

- 7.45 As identified above, Queen Street is a secondary retail area, but that is entirely appropriate given its location relative to the town centre. The retail parade is diverse and includes a number of independent stores. This point of difference should be celebrated, and could be enhanced through frontage, paving and street furniture improvements.
- 7.46 Frontage improvements can be relatively straightforward to implement if funding is in place. With the agreement of occupiers and owners, something as simple as a fresh coat of paint and some new awnings can help to enhance an area's image. Building on this, through engagement and the use of design teams it can be possible to curate a coordinated aesthetic across a whole street, using a consistent palette of colours or fonts etc. These kinds of visual enhancements can serve not only to improve appearance, but also to provide an identity to a particular area. This could be particularly useful in the case of Queen Street in establishing an identity distinct from the main town centre.
- 7.47 In terms of other improvements, whilst the existing street furniture is attractive in parts, it could be improved, particularly with the introduction or limited tree planting and paving improvements. The paving could be coordinated with frontage improvements to ensure aesthetic consistency. Examples of interventions similar to this are shown below.



Frontage improvements with branding at Nunhead, London



Coordinated frontage and paving improvements at Leytonstone, London

- 7.48 Funding for these improvements will clearly require a business case. The justification for this should make reference to the potential enhanced trade generated, and the strategic importance of establishing an identity for this area to preserve its secondary retail role into the future. It should also be possible to secure contributions to the improvements from the local owners and occupiers, using public funds to leverage private investment.
- 7.49 A sketch impression of how Queen Street improvements could look is given below.



River Arun Corridor

- 7.50 The River Arun Corridor represents an opportunity to open up an under-utilised asset, the River Arun, to the wider town centre.
- 7.51 The Office Outlet / Currys site has been discussed above. Moving eastwards over Worthing Road, there are some office buildings fronting onto the river, of which one is currently undergoing residential conversion. Whilst loss of office floorspace should be resisted in general, as above the North Street/Station Quarter is considered to be the best strategic location for offices. If new floorspace can be added here, then loss of space elsewhere is less of an issue.
- 7.52 Development of these offices should ideally take the form of comprehensive redevelopment, to make the most of the river, rather than simple conversion. Development could also contribute to enhancing the river, both through direct works and financial contributions.
- 7.53 Improvements to the river could include clearing of excess vegetation, path and cycleway improvements, and the addition of features including bridges.
- 7.54 Moving further east, into the park around the river, no development of the park itself is proposed, but there may be improvements as above. In particular, lighting improvements to cycle paths would be beneficial. Reinforcing this cycle route would help to establish this as a key route into the centre of town for cyclists, a viable alternative to the main roads. This route could also be linked through the centre of town, along existing routes by Sainsbury's to the Causeway, and up to Carfax, and on to Horsham Park via Medwin Walk (for more on Medwin Walk see below). This would require cycle path improvements through the centre of town,

along Carfax. The designation of a dedicated cycle route, including separate paving and signage, would assist in this.

- 7.55 Delivering these improvements would require funding, but much could be provided through developer contributions, including CIL when implemented. There is also a range of public funding sources available for cycling-related improvements in particular, which the Council may be able to utilise.

General Improvements

- 7.56 A number of non-development interventions are identified in section 6, including wayfinding and signage, public realm, crossings and other improvements.

Wayfinding and Signage

- 7.57 Wayfinding and signage could be improved in Carfax and at Freshwater Parade / Worthing Road to improve legibility of the town centre including awareness of the locations of key anchors and the ease of walking between them. Delivery of these improvements would be relatively straightforward, requiring allocated funding from the Council and simple planning permissions. The time should be taken, however, to strategically consider which key elements of the town centre peoples' attention should be drawn to. From the preceding analysis, routes to Horsham Park are considered to be underused, and that the link across Albion Way between West Street and Freshwater Parade could be better used, so these may form a focus of the signage. The signage could also be used to highlight key heritage assets within the town centre, but at the same time communicate modern, coordinated branding for the town centre (more below).

Public Realm

- 7.58 In terms of public realm improvements, there is the potential to rejuvenate the street furniture around Carfax, and utilise new paving to emphasise the link between Piries Place and the rest of the town centre, and in the process align public realm with that around West Street for consistency. Currently there is a disjointed approach between the two areas, which adds to the impression that Carfax is somewhat secondary to West Street. The use of more modern

materials, whilst still sympathetic to the historic assets in the area, would help to communicate a refreshed image for the town centre.

- 7.59 To maximise the benefits of this intervention, the Council should consider what image the town centre should project going forwards, and select materials and designs which meet it. Through consultation in preparing this report it became clear that local stakeholders wanted to retain the historic image of the town centre, but also communicate its more modern elements, including a nascent computer gaming industry, and potential to diversify and expand its night-time economy. It may be worth employing specialist place-marketing consultants as part of this exercise.
- 7.60 With an approach and designs agreed, again delivery of these elements would be relatively straightforward, though funding requirements are likely to be more significant than for signage. Clearly, a business case will be required as justification. This could focus on how public realm improvements would complement and enhance town centre marketing strategies, presenting a coherent overall message. The improvements would also, in conjunction with the Piries Place proposals, serve to reinforce the importance of Carfax as part of the town centre and mitigate any risk of this area declining in the face of new developments at the western end of the town centre. Contributions towards these improvements could also potentially be secured from development, either through S106 payments or CIL once introduced.
- 7.61 Public realm improvements can also be made at Bishopric. The Council is considering options for enhancing the public realm following the recent temporary provision of tree planting at the junction with West Street. Whilst it may be helpful to maintain landmark public realm to some extent, to provide identity and improve wayfinding, this can also be achieved through more understated street furniture which is designed well, to encourage use and hence enhance visual memory of the area. Replacement public realm may potentially focus on seating to encourage dwell times in this location. .
- 7.62 'The Bishopric survey responses confirmed the need to improve connectivity between the town centre and John Lewis at Home and Waitrose. Also businesses in the area and footfall in general would benefit from some of the existing vegetation being removed, however, overall the public are keen to retain as much soft landscaping and water features as possible. Noting all the survey responses received the Council proposes, at section 9.5, to develop and consult on a detailed scheme to improve the Bishopric public realm'

Road Crossings

- 7.63 A number of potential opportunities are identified for new or improved crossings over Albion Way. It is acknowledged that these interventions carry potentially significant implications for

traffic flow which will require detailed modelling with West Sussex County Council, and that these may be a more long term proposition for that reason.

- 7.64 However, the town centre could benefit significantly from improved links to Horsham Park and to Bishopric. As such it is worth continual review of the potential for these crossings with the County. Relatively lighter touch interventions could be to introduce an additional crossing over Albion Way at the northern side of the junction with Bishopric as well as to the south. This would not significantly restrict traffic flows given it would entail the addition of a crossing at an existing junction which is already traffic light controlled. It would reinforce the link between the western side of Bishopric/Freshwater Parade and the town centre, providing an additional desire line for pedestrians.
- 7.65 The other potentially less onerous intervention is improvements to the underpass link between Horsham Park (at the Park Surgery) and Medwin Walk. Public realm at either side of the link is not of poor quality, but the underpass itself could benefit from improved lighting and general uplift e.g. railing, paving and decorative improvements. Access could also be improved with the addition of a wheelchair lift, and cycling could be encouraged if painting were added to communicate the route and cycle racks were added on the town centre side.
- 7.66 This would improve the link without disrupting traffic flow, and hence may be a deliverable intervention in the shorter term.
- 7.67 Another valuable link could be provided with the addition of a crossing at the eastern end of the pedestrianised section of East Street, over to the southern side of East Street where it meets Denne Road. Subject to highways assessments, this could feasibly comprise a relatively simple zebra crossing. The Council should investigate the potential for such a crossing by conducting appropriate studies, as this would improve links towards West Street.
- 7.68 More generally, the potential for crossing improvements over Albion Way should be under periodic review by commissioning traffic modelling. Engagement with the County should be continued to ensure that its views are well known and to keep the dialogue open. In the meantime, however, the above may be potential interventions with a greater prospect of delivery in the shorter term.
- 7.69 Whilst the retail core of the town centre functions well, enhancements around Swan Walk and Carfax could nevertheless be made, focussing on improving way finding through both enhanced signage and more coordinated (and better quality) public realm treatments. There are opportunities at Carfax to greatly improve the setting and prominence of the town's key heritage assets in creating an authentic sense of place, e.g. through reducing ad hoc

business signage, ensuring consistency of high level signage ,and incorporating feature lighting of heritage assets in the evenings;

- 7.70 Crossings across Albion Way should be reviewed for all the key gateways to the town centre. Currently, links between the town centre and Horsham Park are poor, which diminishes the potential mutual reinforcement between the two. There may be the potential to improve existing crossings, and/or introduce new ones. More radical options may also be available, implementing traffic management measures or realignment to Albion Way. The potential for this should be investigated; and
- 7.71 Besides the various public realm and signage improvements suggested for the town centre, other 'soft' improvements may include the provision of town centre Wi-Fi hotspots, or 'pop-up' stores. As the popularity of internet shopping continues, and as Horsham's catchment population shifts to include a greater proportion of younger residents, it is important that the town centre diversifies its role. Wi-Fi hotspots would be a relatively low cost addition which would increase dwell times. In addition, well-regarded markets are already established at Carfax and this principle could be extended to other parts of the town centre, e.g. Bishopric and to a broader range of goods, e.g. street food, bars or clothing.
- 7.72 A Delivery Schedule in Section 9 provides a summary of all the supported interventions proposed.

8. Conclusions

- 8.1 Horsham is performing well as a town centre within its regional context, and is viewed as an attractive market town with a good range of shops and a compact centre. However, it is important to continually review performance and assess what opportunities exist for future development, to steer the town in a desired strategic direction.
- 8.2 Horsham should look to build on its success, diversifying its image from a market town to a *modern* market town, catering for a full range of ages and incorporating the highest quality development and materials in public spaces.
- 8.3 The town is also facing a number of pressures to meet forecast requirements for housing delivery, car parking and retail floorspace, which it will be important to try to accommodate in the town centre rather than out-of-centre locations.
- 8.4 A number of development sites have been identified in this study which between them could help to meet some of these demands. Increased public car parking provision could potentially be accommodated at Office Outlet / Currys (c 25 spaces) and at the RSA Car Park (c 150 – 350 spaces, depending on development options and extent of public access). The Council is also investigating the potential to increase car parking provision at Piries Place Car Park.
- 8.5 Regarding residential development, the RSA Car Park could accommodate about 20 houses, depending on the development option pursued, and approximately 250 units could be accommodated through the redevelopment of the Forum / Sainsbury's site, though there are significant viability concerns with comprehensive redevelopment of this site .
- 8.6 There are few sites available in the town centre to accommodate significant new retail development, without resorting to increased height. In GVA's view, upwards extension of Swan Walk is unlikely to be viable. Retail intensification at Office Outlet / Currys could deliver an increase of c 1,640sqm net retail floorspace. Besides this site, the Sainsbury's site is the other major town centre opportunity. With residential-led redevelopment and re-provision of the food store, an increase of c 2,092 sqm net retail floorspace could be delivered on this site. There may be the potential, however, to increase this with a retail-led scheme as an alternative to the residential-led scheme envisaged in this report. This potential should be considered further in conjunction with feasibility to work up the first phases of this development.

- 8.7 This report also proposes a range of other interventions in the town centre, including public realm, cycle path, street furniture, public Wi-Fi and stakeholder engagement proposals. To take these to the next stage, the Council should consider availability of funding, both from internal resources, potential developer contributions, and central public funds. Some of these may be, subject to funding, relatively straightforward to implement. Others will require further feasibility investigations, particularly including traffic modelling.
- 8.8 The Council may wish to consider establishing a dedicated internal team to implement proposals contained in this report, including engagement, in order to maintain momentum. It is important to define a programme of improvements, based on realistic internal capability and funding, with clear accountability to really drive change.

9. Delivery Schedule

- 9.1 The Horsham Town Centre Vision has been prepared to provide a clear vision and framework to support and sustain the town centre in the light of planned residential growth; demographic change; shifting retail shopping patterns; to protect and enhance Horsham's historic environment and to take advantage of potential development and improvement opportunities. The realisation of the vision will create a more vibrant, sustainable and successful town centre that meets the needs of residents, visitors, businesses and employees.
- 9.2 Horsham District Council is committed to working in partnership with key local and statutory organisations. At a time of constraints in public and private sector funding, it will be necessary for the partners to work hard to access potential sources of external funding. The partners should be alive to funding opportunities and be prepared to respond quickly and positively. Flexibility might be required amending projects and timescales to fit with emerging funding opportunities. The promotion of projects within a comprehensive vision and framework with clearly defined outputs and benefits will assist in accessing funding.
- 9.3 Current potential funding sources include S106/S278/CIL contributions, European Union funding and Local Enterprise Partnership funding, alongside any existing District Council funding. There are also opportunities for private sector contributions towards projects where commercial benefits result.
- 9.4 Based on the public exhibition and consultation surveys conducted in May and June 2017 the following Strategic Directions and improvement projects for the town centre were supported:

Ref	Direction	Outputs
SD1	Respond to demographic change	Provide more and better leisure and retail opportunities for families and a growing younger population.
SD2	Strengthen retail and leisure, support employment growth and the economy	Provide a larger choice of town centre uses and experiences, including leisure and a range of space sizes, including flexible employment space.
SD3	Increase and diversify housing provision	Provide new, high quality housing developments to meet local needs and increase town centre visits.
SD4	Expand hotel provision	Provide a contemporary offer for business travellers, weekend tourist and family occasion visitors, with potential for both budget and a smaller up-market 'boutique' hotels with potential for a Horsham conference venue.
SD5	Support new cultural and	Provide and improve town centre cultural and

Ref	Direction	Outputs
	community infrastructure	community facilities to create more activity, improve the nighttime economy and increase sense of community. Support and diversify The Capitol's cultural offer.
SD6	Enhance access and movement	Focus on improving gateways into the town centre, make it easier to find your way around, improve the appearance of the town, improve cycling facilities, upgrade appearance of car parks and provide additional car parking to meet demand.
SD7	Evolving image and identity	Define and promote Horsham's identity as a modern market town. Encourage use of historic forms and materials; reduce blank facades and unsightly servicing and large bin storage areas.

9.5 Flowing from the directions above the town centre Vision has identified strategic development opportunities which have the potential to come forward over the vision period. The following Delivery Schedule provides a brief overview of Key Projects, linked strategies and Key stakeholders. All schemes will need to be developed, designed, tested and refined using evidence and be subject to business cases, consultation and all relevant statutory processes:

Delivery Schedule

Ref. No.	Project name & description	Strategic Direction Ref/Linked Strategies/Projects	Key Partners
1	Public realm strategy: Develop a 'holistic' town centre public realm strategy that addresses: <ul style="list-style-type: none"> • Character spaces • Linkages, connectivity and movement between spaces • Wayfinding and signage • Development and design guide • Public realm materials and street furniture palette • Gateways, pedestrian crossings and underpasses • Public art 	SD6, SD7 Cycling & pedestrian strategy Economic strategy 2017-2027 Tourism strategy Opportunity sites	Horsham District Council ('HDC') West Sussex County Council ('WSCC') Horsham Society Neighbourhood Councils Horsham District Cycling Forum ('HDCF') Horsham Town Community Partnership ('HTCP') Horsham Unlimited Horsham in Bloom
2	Walking & Cycling strategy: Develop a strategy to improve and develop cycling and pedestrian infrastructure and	SD6, SD7, SD2 Tourism strategy Sport and physical activity	WSCC Neighbourhood Councils

Ref. No.	Project name & description	Strategic Direction Ref/Linked Strategies/Projects	Key Partners
	movement within and around the town centre including making better use of the River Arun area.	strategy 2016 to 2031	HDCF Horsham Society HTCP Horsham Unlimited Horsham in Bloom
3	Promote image and identity: Develop a tourism and marketing strategy for Horsham and Town Centre including options for extending public Wi-Fi.	SD7, SD2, SD6, SD5 Economic strategy 2017-2027	HDC Neighbourhood Councils Horsham Society Horsham Unlimited HTCP Horsham Unlimited Horsham in Bloom
4	Car parking strategy: Develop a car parking strategy to address future demand, management, access, usage and appearance.	SD6, SD2, SD1, SD3, SD5 Economic strategy Tourism strategy Retail strategy	HDC Neighbourhood Councils Horsham Society HTCP Horsham Unlimited
5	North Street/Station Quarter – Develop scheme to enhance public realm between Horsham Station and town centre including subways. Explore opportunities to expand hotel provision and assess options to market Park House as a 'boutique' hotel to be considered in conjunction with development proposals in Hurst Road.	SD2, SD6, SD7 Economic strategy Public realm strategy Hotel and Visitor Accommodation Study Tourism strategy	HDC WSCC Neighbourhood Councils Horsham Society HDCF Network Rail Horsham in Bloom
6	West St/Forum link – Improve connectivity and appearance including the Blackhorse Way crossing. Blackhorse Way (1) – Develop a waste and servicing arrangements strategy to address overall management and appearance. Blackhorse Way (2) – Assess one way traffic options and develop scheme to reduce traffic flows and improving pedestrian facilities, including the West Street to Forum link, and upgrading the public realm.	SD6, SD7 Economic strategy Public realm strategy Retail strategy	HDC WSCC Neighbourhood Councils Horsham Society HDCF HTCP Horsham Unlimited Horsham in Bloom

Ref. No.	Project name & description	Strategic Direction Ref/Linked Strategies/Projects	Key Partners
7	<p>Forum/Library (1) Western area – Explore potential and develop scheme to improve use of site with a Civic hub combining library, health and advice facilities and improve links to Worthing Road/Bus station.</p> <p>Forum/Piazza (2) Southern area – Explore potential and develop scheme to partially enclose with additional retail/residential uses and improve environmental conditions.</p>	<p>SD5, SD7, SD6</p> <p>Public realm strategy</p> <p>Economic strategy</p> <p>Retail strategy</p>	<p>HDC</p> <p>WSCC</p> <p>Neighbourhood Councils</p> <p>Sainsburys</p> <p>Surgery</p> <p>CAB</p> <p>Horsham Society</p> <p>HTCF</p> <p>HTCP</p> <p>Horsham Unlimited</p> <p>Horsham in Bloom</p>
8	<p>Bishopric (1) Eastern area (Albion Way-West Street, including Springfield Rd and Worthing Rd axis): Develop a detailed scheme to improve the public realm and increase connectivity to John Lewis@Home and Waitrose.</p> <p>Bishopric (2) – Western area (Albion Way-Rushams Rd): Progress a detailed scheme to enhance public realm, western gateway and support retail function.</p>	<p>SD7, SD6, SD5, SD2</p> <p>Public realm strategy</p> <p>Economic strategy</p> <p>Retail strategy</p>	<p>HDC</p> <p>WSCC</p> <p>Neighbourhood Councils</p> <p>Horsham Society</p> <p>HDCF</p> <p>Horsham Unlimited</p> <p>Horsham in Bloom</p>
9	Town Centre – East: Progress Queen Street/Iron Bridge improvements, eastern gateway and links to East Street to include supporting retail function and area identity.	<p>SD7, SD6</p> <p>Public realm strategy</p> <p>Economic strategy</p> <p>Retail strategy</p>	<p>HDC</p> <p>WSCC</p> <p>Network Rail</p> <p>Neighbourhood Council</p> <p>Horsham Society</p> <p>Horsham in Bloom</p>
10	Horsham Station/Royal Sun Alliance car parks – Explore options and develop schemes to increase parking capacity and potential for additional residential provision and explore options for public use of car park.	<p>SD6, SD3, SD2</p> <p>Car parking strategy</p> <p>Economic strategy</p>	<p>HDC</p> <p>WSCC</p> <p>Network Rail</p> <p>Royal Sun Alliance</p> <p>Neighbourhood Councils</p>