

REPORT TO JWAAC ON 11th MARCH 2020

SUBJECT: BOGNOR REGIS TOWN CENTRE PUBLIC REALM SCHEME – FINAL EVALUATION REPORT

REPORT AUTHOR: Caroline Gosford, Arun District Council

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EXTN: 01903 737854

PORTFOLIO AREA: Economy Group, Place Directorate, Arun District Council

EXECUTIVE SUMMARY:

The report details the evaluation of the overall public realm scheme and the impact that it has had on town centre improvement.

1. BACKGROUND:

1.1 National picture for town centres/High Streets

Since the increase of out-of-town shopping and widespread internet availability, how people shop, bank and use their town centres has been changing. Internet shopping has risen rapidly and sharply from 14% of total in 2014 to 25% of total in 2018 which is more than 10% increase over 4 years, and this will grow year on year. The high street is in decline and has been for many years as evidenced by the demise of hundreds of high street brand names. Vacant town centre retail space needed to be repurposed and refreshed. Different functions, other-than-shopping, were needed to attract people to spend time and money there to enable them to survive and flourish.

Central government has produced research that documents the demise of retail and advises best practice for future town centre sustainability and vibrancy such as Portas Report 2011 and 2016 and Grimsey Reports 2013 and 2019. All agree that while retail still has a place, a wider diversity of service-based activities that require a customer to be present such as food and drink, leisure and culture e.g. gyms and theatre and health and beauty outlets e.g. dentists, barbers and nail bars is required for economic sustainability. Town centres need to become social hubs with increased residential accommodation to provide new footfall. All agree that creating town centres that are a “nicer place to visit”, especially in respect of public spaces, is a priority.

The public realm improvements have taken place against a backdrop of the worst retail trading conditions in living memory which has severely dented business confidence and stunted investment.

Some years back Arun District Council prioritised work to improve its town centres.

1.2 Town Centre History

In 2011 the Arun District Council was instrumental in drawing together a stakeholder partnership, the Town Centre Management Group, to look at how to improve Bognor Regis town centre.

In 2012 an independent survey of traders was commissioned by the Council to establish their priorities for improvement, and a Walking Tour of the town undertaken with Members from all tiers of local government to understand their priorities. From these data sources, two key priorities were identified: improvement of the public realm and proactive management of all aspects of the town centre. A previous report outlined

progress in respect of town centre management and the introduction of the Business Improvement District (BID) between 2012 and 2018.

From 2013, the Council focused on the public realm improvements which have been delivered for the core town centre area.

1.3 Strategic fit

The need to improve and upgrade the town centre public realm and create stronger linkages between seafront and town have been identified in other strategies and consultations such as the Bognor Regis Masterplan (“The town centre vision will create a quality environment of integrated, people-friendly streets and open spaces for people to live, rest and enjoy and to provide a new piece of townscape responding to the 21st century”) and the Trader consultation mentioned above.

Public realm improvement work is aligned with both Arun District Council and the Coast to Capital Local Enterprise Partnership priorities, and Ministry of Housing Communities and Local Government national policy.

1.4 Project governance and development

To ensure collective agreement and approval of any public realm scheme, a partnership Project Development Group was formed comprising members and relevant officers from town, district and county councils. This Group worked together throughout the design process and prioritised delivery of the first phase in the London Road precinct. An officer Project Delivery Group led the delivery phase.

The design process was strongly consultation-led and is set out here. A Design Brief with the emphasis on quality, distinctiveness and connectivity between station, town and seafront was compiled and tendered to appoint to the landscape design contract. [LDA Design](#) were appointed as landscape architects; their previous experience includes the Olympic Park and the East Bank riverside walkway in Littlehampton. LDA Design held a Key Stakeholder workshop to get local input about the needs, issues and constraints in the town centre which led to the outline designs that emerged. Public consultation on the outline designs was held in March 2013. Support for the designs was overwhelmingly positive; over 300 people attended the manned exhibitions, 94 people completed the questionnaire and 81% of those surveyed agreed that the proposals would raise the quality of the town centre environment and experience.

1.5 Project delivery

The Project Group had prioritised the first phase of works to be the London Road precinct which is the core retail area of the town centre. Other phases were Station Square aka the station forecourt, to create a fitting gateway to the town centre and Station Road to make pedestrian access and crossing points easier and create strong intuitive links towards the precinct and seafront.

The designs also included Place St Maur as the obvious link to the seafront. High Street was also included however only very basic designs could be undertaken pending information from JWAAC on future traffic flows in this area, as was the open space adjacent to Morrisons store which had a live planning application for store expansion that did not expire until 2014, so designs were also basic here.

Traffic Regulation Order (TRO) changes were required including parking restrictions within the London Road pedestrian precinct to tackle the many vehicles that drove and parked illegally in the precinct.

Funding was required to deliver the first phase in the London Road precinct, and this was collated from a variety of different sources set out below:

- Sainsbury's S106 – £376,620
 - WSCC Kickstart - £180,000
 - Arun District Council various sources - £81,330
 - Bognor Regis Town Council - £9,747
 - Portas Pilot funds - £7,500
- Total cost - £655,917

The first phase of work was completed and transformed the precinct into a bright modern stylish and largely vehicle-free space. There is more seating and dwell spaces, and intuitive walking links towards the seafront and railway station. The new layout enables large scale events such as speciality markets and the Aerial Birdman zipwire and there is allocated space for café tables and chairs to spill outdoors, creating a vibrant and animated street scene.

The work to the precinct was used as “match funding” for a large £1.649m bid to the Coastal Communities Fund in 2013. This funding was awarded in early 2014, and between then and 2017 it delivered Station Square as a transformed and beautiful gateway to the town and a fitting setting for the Grade II listed station building, Station Road with a new dwell space, wider pavements, less and slower traffic making easier road crossings and intuitive navigation plus stylish new monolith wayfinding signs across the town centre and seafront. At the same time, West Sussex County Council delivered the High Street enhancements to complement the recently completed key public realm route between station and towards the seafront. Other areas of High Street were uplifted using Coastal Communities Fund monies with high quality new pavements, road surfaces and street furniture to draw people along this key east-west retail/food and drink axis.

A series of “before” and “after” photos are available as Appendix A which will be presented at the meeting to demonstrate the transformational nature of the public realm improvements.

2. IMPACT ASSESSMENT:

This section of the report sets out the original objectives and desired outcomes from the public realm improvements and evaluates of the impact of the public realm improvements.

2.1 Scheme objectives

A key objective of the enhanced public realm was to attract more and higher-spending visitors to come more often, stay longer and spend more. This has been achieved as will be evidenced below. This objective is a proxy for creating new jobs because more spend means greater turnover which in turn requires additional staff. While it is not possible to measure actual growth in jobs, this has been tested through monitoring activity set out below.

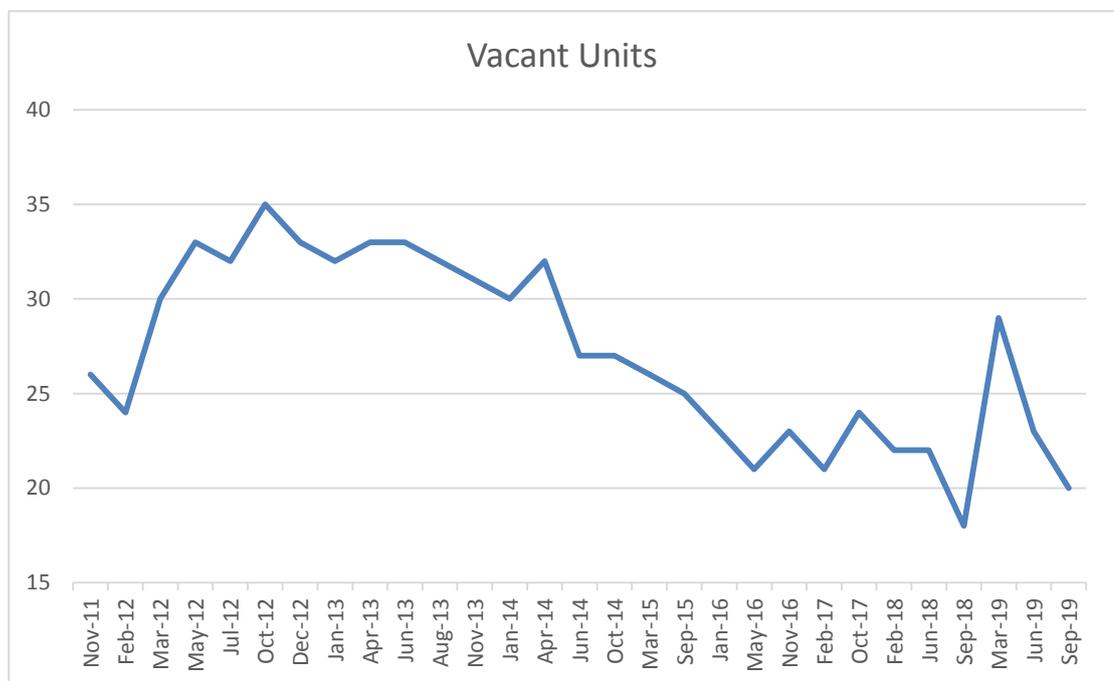
Other key objectives were to reduce vacant units from the high of 35 units (13.3%) before the project commenced in 2012, and also to attract a higher quality of businesses to choose the town to locate their businesses. This objective inherently enables the creation of new businesses and therefore new jobs within the vacant units, especially those that are service-related to drive footfall. Again, both objectives have been met as is evidenced below.

In terms of softer outcomes, there was a clear desire to make Bognor Regis town centre a nicer place to live, work and visit and to generate greater civic pride in a town. There was also a need to ensure that future working between all relevant the agencies was more joined up and co-ordinated to ensure the standard of the public realm was maintained to a high quality and prevent the re-cluttering of the street scene with unmatched and lower quality items.

2.2 Data and Evidence

There is clear and measurable evidence underpinning the improvements delivered in the town centre. Some of this evidence is listed below with the data source in brackets:

- Vacancy rates across the town centre for a defined town centre area with records going back to 2011 halved between October 2012 from 13.3% to 6.7% in September 2018 which was well below national averages. This has since risen slightly to 7.5% in September 2019, and 10.5% for the wider BID area.

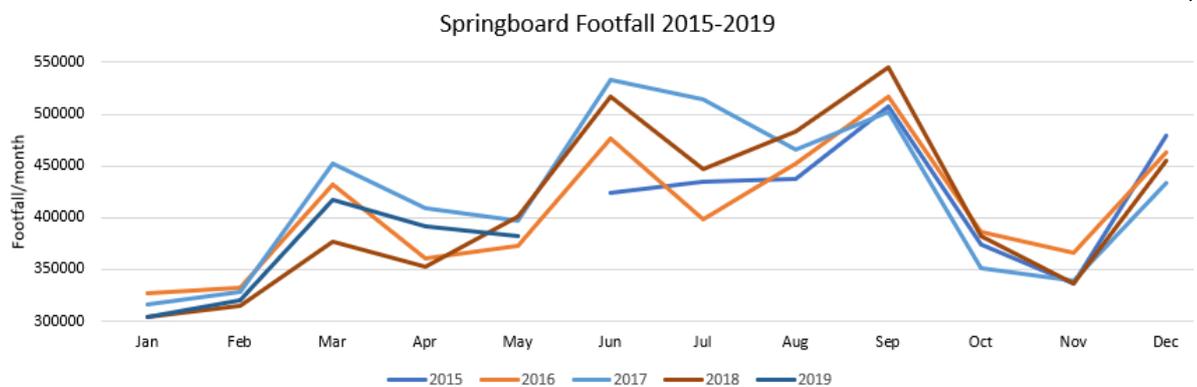


The national average is 10.3% (Springboard: August 2019) and rising again, so the town centre is outperforming the national average, and Springboard's coastal towns index shows higher vacancy rates for coastal town centres than the national average. (Regular Shop Audits).

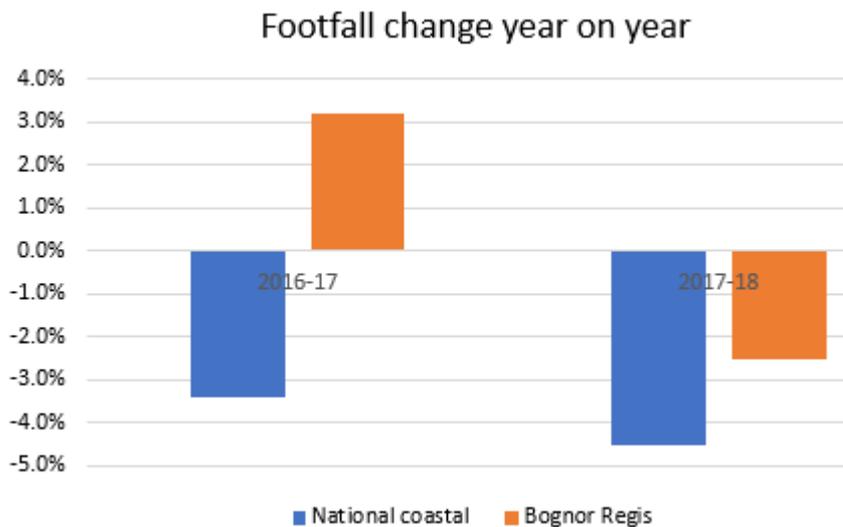
- Shop front condition improved since 2013 from an average of 2 out of 4 to 3 out of 4. The scale used is 1 – “Poor condition, grubby, untidy”, 2 - “Average condition, OK”, 3 - “Good condition, clean”, 4 - “Very good, near perfect”. Improvement has been so marked since audits started that the measurement scale had to be recalibrated for the BID baseline in April 2018 to provide a spread of results. (Shop Audit)
- Increase non-retail outlets: This is changing as retail premises fall vacant, often in more peripheral town centre locations, and non-retail service-led businesses move in, bringing guaranteed footfall because customers have to visit the premises to

collect the service. Recent changes of this nature are an Oxfam charity shop to new orthodontist, Condor Blinds to new barbers. In 2011 52% of town centre premises were retail, and in 2019 this has reduced to 46%, with the food/drink/leisure sector now increased to 15%.

- Visitor numbers increased: day visits up by 7% and overnight/staying visits by 10% between 2013-16 (Tourism SE: latest data 2016). This outperforms the performance of the South East and England overall.
- Visitor spend increased: day visit spend up 2.5% and overnight/staying spend up 3% between 2013-16 (Tourism SE: latest data 2016)
- Footfall increased: Footfall records show that footfall increased by 3.2% year on year between 2016 and 2017, dropped by 2.5% between 2017 and 2018, mainly due to very poor weather in Mar and April 2018, and is showing signs of recovery in 2019 as the first 5 months are 4% up on 2018 figures.



This is against a national backdrop of annually reducing footfall with the national coastal town index showing 3.4% drop 2016-17 and 4.5% drop 2017-18. (Springboard)



This indicates that Bognor Regis is “punching above its weight” against its peers in terms of footfall in these tough trading conditions.

The new public realm has enabled large scale regionally-important town centre events to be held within the redesigned precinct such as specialist markets (which attract approximately 10,000 extra people per day according to footfall monitoring)

and the Aerial Birdman zipwire (which attracted an additional 20,000 people per day). These quality events are designed to appeal to higher-spending visitors and this was anecdotally borne out, with stores reporting record sales on the weekend of Aerial Birdman.

2.3 Before and After surveys with the public and traders

To enable monitoring of the impact of the public realm improvements, independent research surveys were carried out with both traders and the public across the life of the project to create a “before” and “after” snapshot of how the town centre is used and perceived. The “before” survey was carried out in September 2014 to create a baseline, and the “after” survey in September 2018, two years after the completion of the works with the aim of recording the change in satisfaction with the town since the 2014 baseline. The samples in each case were as close to “like for like” as possible to enable meaningful comparisons to be drawn. Around 250 members of the public and 200 traders were interviewed each time.

An important factor in both surveys has been the impact of external influences. When the surveys are compared the difference in time between these two surveys and the impact that external variables could have on the data must be considered, especially those relating to consumer shopping habits and spend, and the rapid demise of the retail sector nationally.

A key change has been the move away from shopping in person towards internet shopping which is particularly true for non-food items. Data shows that in 2014 16% of non-food spend was on the internet, and in 2017 that has risen sharply to 25% of spend¹. This drop in non-food spend is reflected in the data collected in 2018 which shows a fall in spend on both household goods and clothing sales. These changes to how people shop are also clearly reflected in the survey results where online spend in 2014 was around 10%, and in 2018 this was around 25%.

Data reported by Visa in 2017 highlighted that British households had cut back their spending for the first time in four years (i.e. since prior to the 2014 survey) and that this included spending on “*clothing, household goods, food and transport*”².

It is against this backdrop that the findings of this research should be considered, especially when comparing the results from 2014 to those from 2018.

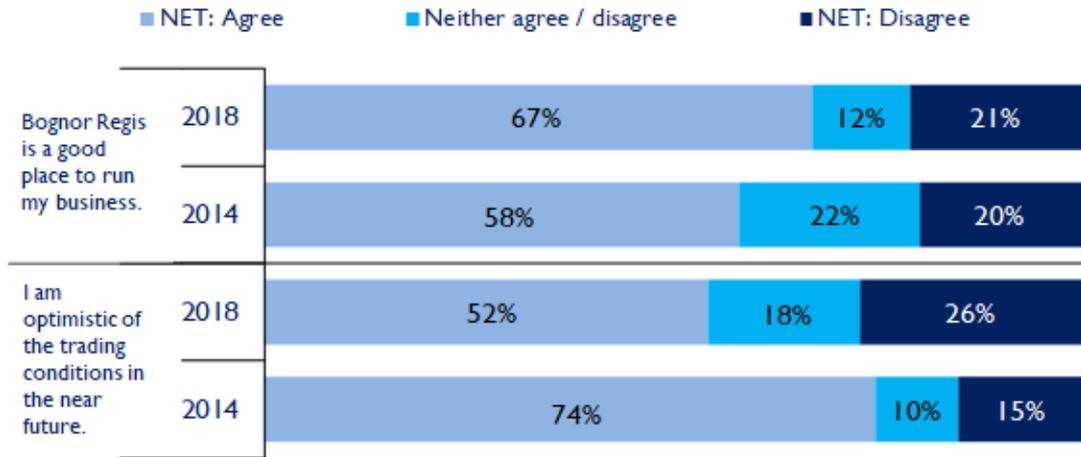
The full survey reports are attached as Appendix Bi and ii, but some highlights are listed below.

- **Trader Surveys: Business confidence:** The survey indicated that business confidence as expressed in the likelihood of employing more staff remained consistent between 2014 and 2018 which is pleasing given the decline in retail and retail employment nationally. The same is true of those businesses indicating growth in turnover.

¹ Financial Times; Online retail sales continue to soar (11 Jan 2018)

² The Guardian; UK household spending falls for first time since 2013 (12 June 2017)

Q10. Lastly, how far do you agree or disagree with the following statements...



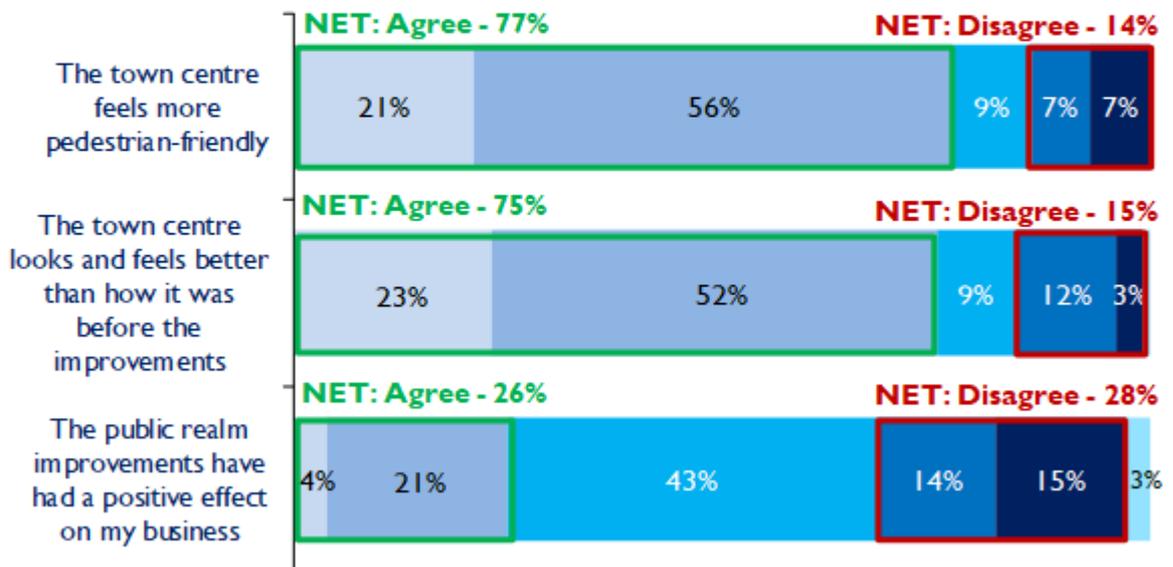
Source: Qa Research 2018 Base: 2018: 117, 2014: 105 (all respondents)

When asked if Bognor Regis was a good place to do business there was strong improvement from 58% agreeing with this statement in 2014 to 67% in 2018 which is pleasing given the ongoing national decline in retail business confidence. This is an endorsement of the improvement work delivered by public realm and Town Centre Management Initiative/BID. The result of the wider business confidence question about being optimistic about trading conditions in the future was reversed with 74% agreement in 2014 reducing to 52% in 2018 which aligns with national trends.

- Impact of public realm: Businesses were positive about the public realm improvements with 75% agreement that it looked and felt better than before, and 77% agreeing that the work had made the town centre more pedestrian-friendly.

Q3c. Thinking about the public realm improvements, how far do you agree with the following statements...

Strongly agree Agree Neither/Nor Disagree Strongly disagree Don't know



Source: Qa Research 2018 Base: 2018: 117 (all respondents)

They were less sure that it has had a positive effect on their businesses with the highest response “Don’t know” and 68% thought it had made “no noticeable difference” to footfall which is borne out by footfall data that shows small actual changes. However again this evidence must be viewed against national and coastal town footfall performance which shows year-on-year decreases, meaning the town is performing better than its competitors.

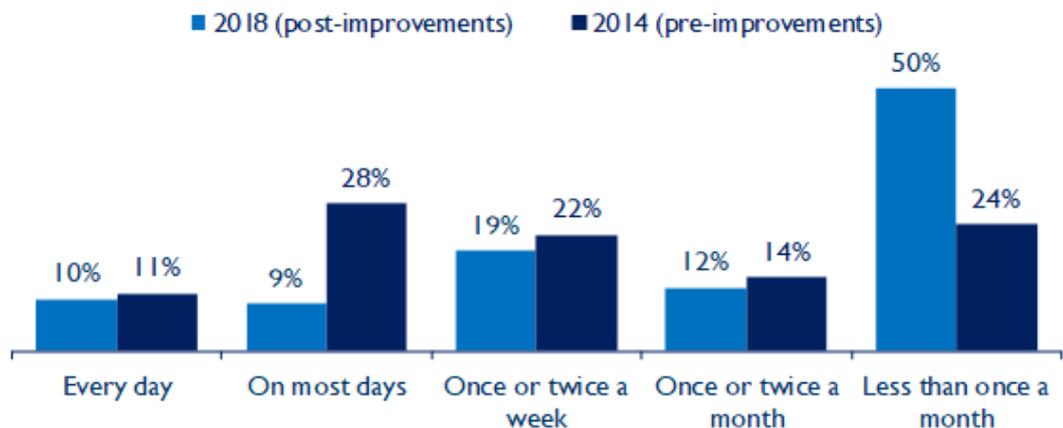
- Employment changes: The survey evidence was inconclusive in respect of increasing employment within the town centre. It needs to be remembered that nationally retail employment has been in decline since 2017. In keeping with national trends, the survey indicated that the larger chains seemed to reduce employment between 2014 and 2018 whereas local stores retained the same or slightly increased employment. Smaller independent businesses are more resistant and resilient to national declining trends than national chains, so it is pleasing to note that most of the new businesses locating in Bognor Regis are good quality independents.
- Public Surveys: Satisfaction with town and new public realm
The surveys of the public visiting the town centre “before” and “after” the public realm work both show improvements in satisfaction with their town centre experience.

Satisfaction with the town centre				
	2014 (pre-improvements)		2018 (post-improvements)	
	Residents	Visitors	Residents	Visitors
NET: Satisfied	61%	74%	65%	88%
NET: Dissatisfied	26%	9%	19%	7%
Base	156	102	121	137

Residents rose from 61% to 65% and visitors from 74% to 88%. In terms of the question “The town centre looks and feels better than how it was before the improvements” 88% agreed that it did which indicates strong satisfaction with the public realm improvements.

- Number of visits and dwell time – from the surveys these measures would appear to have dropped which would be in line with changing shopping habits and reducing disposable incomes within the resident population.

Q3a. How often do you usually/ would you plan to visit Bognor Regis Town Centre for shopping or for leisure?



Source: Qa Research 2018 Base: 2018: 258, 2014: 258 (all respondents)

Comparison between the “before” and “after” public surveys showed that residents who visited the town centre on ‘most days’ has reduced from 58% in 2014 to 36% in 2018. This data is skewed by a higher percentage of out of town visitors in the 2018 survey and the small sample sizes.

The average length of visits as measured by the survey has also fallen:

	2014 (pre-improvements)		2018 (post-improvements)	
	Residents	Visitors	Residents	Visitors
Mean average length of visit (mins)	92	151	64	120
Base	156	102	121	137

This is countered by the Tourism South East evidence above that demonstrate that more visitors are being attracted to come to the town.

- Visitor spend – from the public surveys there is a clear reduction in household goods spend between 2014 and 2018, especially from residents which is indicative of reducing incomes locally.

	Mean average spend in the town centre			
	2014 (pre-improvements)		2018 (post-improvements)	
	Residents	Visitors	Residents	Visitors
Food and drink in cafes, restaurants, bars, etc	£1.82	£5.01	£2.86	£8.50
Shopping for clothes or shoes	£4.62	£7.12	£5.00	£7.33
Household goods shopping	£13.00	£6.06	£8.09	£5.48
Souvenirs or gifts	£1.38	£2.44	£1.31	£2.04
Attractions and entertainment activities	£0.02	£0.33	£0.00	£1.74
Getting beauty treatments	£0.23	£0.63	£1.07	£0.41
Other	£4.54	£0.80	£2.24	£1.13
Base	156	102	121	137

Conversely both resident and visitor spend on food and drink has risen significantly in the same period which is an endorsement of the improved food and drink offer in the town, and indicative of the changing way people use town centres. The Tourism South East data above endorses the surveyed increase in visitor spend.

2.4 Attraction of inward investment

The improvement of the public realm within the town centre has generated significant private investment in the town centre which may otherwise not have happened. This investment has been a key component in raising the quality “look and feel” of the town centre. Some examples are listed below, and there are some photos illustrating investment in Appendix C which will be presented at the meeting:

- Business premises improvements – as mentioned below the level of maintenance to external shop fronts has radically improved with well over 60% of town centre properties having made significant improvements to their outward appearance i.e. not just regular redecoration. There is a clear knock-on effect where a business upgrades their shop front, and their neighbours follow suit “to keep up with the Jones’s”. Small shopfront improvement grants have been made available to businesses in 2018 and 2019 via the Council to encourage and support this activity, with the money very appropriately coming from the West Sussex pooled business rates pot. The result is a very different outward appearance to all aspects of the town centre to 5 years ago. There has also been a lot of investment in internal shop-fitting and in the upper storeys of town centre premises. Examples of these works are Boots where their largest refurbishment contract on the country in 2018 was in Bognor Regis and radically uplifted the offer and store layout; New Look and Burtons having the stylish stone upper storeys cleaned of disfiguring pollution staining; many of the units in Queensway and High Street where upper storeys were largely untidy vacant office or storage space which has been converted into neat, good quality residential accommodation bringing new footfall into the town centre.

A conservative estimate of the value of the privately-funded improvement works to town centre premises is £5m. The total value of all public realm works including West Sussex CC High Street works was approx £2.8m delivering a good multiplier on the original public sector investment.

- Quality of offer and incoming businesses – It is pleasing to note that new good quality businesses are choosing to locate in Bognor Regis, and that many of them are in the service sector. In particular, the food and drink sector has expanded from a low start point both in terms of quantity and quality. Over 15 new good quality independent outlets have opened in recent years, for example Mustards and Mezze restaurants, Rainbows waffle and ice cream bar, Pinks Vintage Ice Cream and Warrens Bakery take-aways, and Tao and The Worst Kept Secret bars. This new competition has helped to raise the quality of the existing outlets. New retail chains locating in the town are now mid-range stores such as Trespass and Yours Clothing rather than the value-range Pound shops that may have come 5 years ago.
- New investment – the public realm work has directly resulted in significant investment in the town railway station. The relationships developed whilst undertaking the public realm works at Station Square on the station forecourt led to Southern Rail working with Network Rail, Rail Heritage Partnership and Rail Accessibility Forum to bid to the National Station Improvement Programme, using the Station Square and Station Road public realm investment as match funding. This elegant but neglected Grade II listed building was fully refurbished at a cost of well over £2m transforming the passenger experience while emphasising the heritage assets of the building and bringing the derelict flat back into use as staff space. West Sussex County Council are funding the £1m delivery of “The_Track” which is a creative digital shared workspace utilising the long-vacant large Booking Hall spaces in the station opening in 2020, and the first of two cafes, Hi Coffee Express has recently opened inside the station. This all creates new sustainable jobs and business space. It is highly unlikely that this investment would have been made had the public realm work not been undertaken.

2.5 Intangible benefits

These are benefits that have come out of the public realm scheme that are harder to measure or evidence apart from anecdotal stories.

- Civic Pride: Although this is subjective and hard to measure it appears this has been generated in both town traders and the public. Through the town centre management initiative, traders have been strongly engaged and involved in the many new events run in London Road precinct, from dressing up in Dickensian costumes during a themed Christmas market to being part of the shop window Advent Calendar, Community Clean-Up days to being part of Children’s Fun Days or live music events, handing out samples and leaflets to volunteering at other events.

It is hard to quantify civic pride, but the public seem more proud of, and positive about their town and less tolerant of those who chose to be negative about it. This is demonstrated by calls taken by the Council reporting flyposting defacing new street furniture in the town centre, and by the positive feedback about the public realm improvements noted in the surveys.

- Partnership and co-ordinated working: The town centre has many stakeholders and service providers who previously worked independently of each other. This resulted in a lack of co-ordination demonstrated by the 9 different styles of bollards used across the town centre and a prevailing sense of disrepair and neglect as it was everyone and no-one's responsibility. There was no agreed "big picture" to work or aspire to.

The Council-initiated work to improve the town centre has created strong relationships with partners who hold each other to account to maintain standards and work together to deliver continued improvements.

Joint working around events has created complementarity and increased the benefits they bring to the town, for example, running the ice rink, Christmas Markets and late-night shopping alongside the Town Council's popular Light Switch-On event, and promoting the town and seasonal events holistically rather than piecemeal drew sustained footfall into the town for the benefit of traders. This is demonstrated by the 5% year on year increase in December 2018 footfall despite unpleasant weather in the run-up to Christmas which fully bucked national trends which showed a 3% reduction for the same time period. (Springboard)

2.6 Conclusions

In conclusion, the public realm improvements have delivered against the original aims and objectives and more besides.

During the harshest retail and economic trading conditions in decades, the enhanced public realm in combination with the town centre management initiative has acted as a catalyst to enable the town centre to remain economically stable with modest growth and improvement when other towns locally and nationally are sliding backwards. This is evidenced by footfall, vacancy rates etc above.

This is clearly positive, however it is only a start as the retail decline will continue as shopping habits move further away from the high street. It is the role of councils as civic leaders to work in partnership with stakeholders to drive placemaking and change in our town centres to secure their sustained future prosperity.

An Expression of Interest was submitted to the Future High Streets Fund for the town however unfortunately it was unsuccessful.

3. BACKGROUND PAPERS:

Appendix A: Before and After photos of public realm improvements (to be forwarded after the meeting)

Appendix Bi: Public Survey Report

https://democracy.arun.gov.uk/documents/s1619/Appendix%20Bi%20Bognor_Regis_Public_survey_2018_V4f.pdf

Appendix Bii: Trader Survey Report

https://democracy.arun.gov.uk/documents/s1620/Appendix%20Bii_Bognor_Regis_Business_Survey_2018_V4f.pdf

Appendix C: Before and After photos of premises investment (to be forwarded after the meeting)