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A meeting of the **Cabinet** will be held in Committee Room 2 at East Pallant House on **Tuesday 10 January 2017** at **09:30**

MEMBERS: Mr A Dignum (Chairman), Mrs E Lintill (Vice-Chairman), Mr R Barrow, Mrs P Hardwick, Mrs G Keegan, Mrs P Plant, Mrs S Taylor and Mrs C Purnell

SUPPLEMENT TO AGENDA

BACKGROUND PAPERS TO AGENDA ITEM 6

TSE RESEARCH

The Visitor Economy of Chichester

Building the evidence base

September 2016

Prepared by:
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Contents

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1 Introduction

1.1 Evidence led decision-making

1.1.1 Chichester District Council is developing its vision for the City the wider district and this new vision will be at the heart of future economic and planning policy. Tourism is identified as a key growth area in the vision; latest figures show that tourism injects approximately £411.4 million pounds into the city and the wider district and sustains 14% of the total workforce.

1.1.2 To help the Council support the sector, Tourism South East's Research Unit (TSE Research) was commissioned to carry out an evidence collation exercise to provide the data and insights needed.

1.1.3 This report presents the findings of this research exercise.

1.2 Research activities

1.2.1 The project involved the following research activities.

1.2.2 **Industry audit:** A detailed review of open sources of business intelligence was carried out to pull together a database of all commercial visitor accommodation businesses and tourism attractions across the city. Open sources included the Non-Domestic Property Rates list, the Chichester BID business records list, the Valuation Office Agency website, holiday let websites, camping and caravanning websites and general internet searches.

1.2.3 A separate audit of accommodation and attractions was also carried out across the wider district to enable the Council to assess the scale of tourism supply in the city compared to the rest of the district.

1.2.4 **Economic impact of tourism:** The Cambridge Model was used to establish the volume and value of tourism in the district. The model calculates the value of tourism at district level through using a range of readily available local tourism data to disaggregate a range of regional/ county tourism statistics. As the level of analysis is at the district level, the model in its standard form is not able to separate out volume and value figures at city level.

1.2.5 **Economic impact appraisals of key city visitor attractions:** A modelling approach called PRIME was used to establish the economic importance of the Cathedral, Festival Theatre, Novium, and Pallant House to the local visitor economy. The model requires the input of a range of data about the attraction, including annual turnover, employment and visitor numbers to provide an estimate of the likely gross and net economic impacts arising from the attraction in terms of business turnover and jobs.

1.2.6 **Business survey:** A telephone survey was carried out with a sample of 252 tourism businesses from across the district to gather data on businesses performance. In addition to the core tourism businesses of visitor accommodation and attractions, the survey sample also included businesses from the wider hospitality sector including eateries, pubs and shops. Results are separately provided at city and wider district levels to enable the Council to assess performance in the city with that of the rest of the district. In total, 164 city tourism businesses and 88 wider district businesses provided feedback on trading levels, business confidence, key issues affecting performance and their perceptions of the city as a visitor destination.

1.2.7 **Visitor survey:** A face to face interview survey with a random sample of 889 visitors was carried out in the city centre to identify visitor profile, experiences of visiting the city and their perceptions of the city. The survey included both residents living in the city (PO19 postcode areas) and visiting the city centre area, and visitors living outside the city, including those who live in parts of the wider district.

1.3 Outline of report

1.3.1 Following the introduction, the results of the audit are presented in Chapter 2. Results of the Cambridge Model exercise are presented in Chapter 3 along with results of the PRIME modelling exercise.

1.3.2 The results of the business survey are presented in Chapter 4 and the results of the visitor survey are presented in Chapter 5.

1.3.3 In Chapter 6 we offer our concluding comments on key findings and implications for the Chi Vision.

2 Tourism business audit

2.1 Total tourism businesses

2.1.1 Based on data taken from the Inter-Departmental Business Register (IDBR)[1] there are a total of 6,355 businesses across the district. Tourism businesses account for 7.2% of all businesses in the district. Of this, 6.3% (401) are visitor accommodation businesses and around half of these are self-catering / holiday lets. Only 0.8% (54) businesses across the district are visitor attractions.

Table 1: Number and proportion of tourism businesses

	Number	% of total
Visitor accommodation		
B&Bs	82	1.3%
Camping and Caravan Site	42	0.7%
Guest Houses	1	0.0%
Group accommodation	24	0.4%
Hotel	12	0.2%
Pubs with rooms	35	0.6%
Self catering/holiday lets	202	3.2%
Serviced studios/ apartments	2	0.0%
Sub-total tourism businesses	*401*	*6.3%*
Visitor attractions		
Visitor Attraction, Gardens	4	0.1%
Visitor Attraction, Workplace Attractions	2	0.0%
Visitor Attraction, Museum / Art Galleries	10	0.2%
Visitor Attraction, Places of Worship	1	0.0%
Visitor Attraction, Museums / Art Galleries	7	0.1%
Visitor Attraction, Theatre	1	0.0%
Visitor Attraction, Activity operator	7	0.1%
Visitor attraction - Activity Operator	4	0.1%
Visitor Attraction, Wildlife Attraction	2	0.0%
Visitor Attraction, Farms	3	0.0%
Visitor Attraction, Leisure / Theme Parks	1	0.0%
Visitor Attraction - Racecourses & Tracks	1	0.0%
Visitor Attraction - Arts Centres	2	0.0%
Visitor Attraction, Historic Building/Houses/Other Properties	9	0.1%
Sub-total tourism businesses	*54*	*0.8%*
Total	**455**	**7.2%**

Table 2: Total number of business across district

Enterprises		
Micro (0 to 9 employees)	5,690	89.5%
Small (10 to 49 employees)	555	8.7%
Medium (50 to 249 employees)	95	1.5%
Large (250 plus employees)	15	0.2%
Total	6,355	100%

[1] *The Inter-Departmental Business Register (IDBR) contains information on VAT traders and PAYE employers in a statistical register which provides the basis for the Office for National Statistics to conduct surveys of businesses.*

2.2 Bedspace capacity

2.2.1 Visitor accommodation across the District has a capacity of almost 19,000 bed spaces. The sector with the greatest capacity is the caravan/camping/holiday park sector which has over 14,000 bed spaces (75% of all bed spaces across the District).

2.2.2 The serviced accommodation sector (Hotels, Guest Houses, B&BS, and pubs with rooms) provide 16% of total bed space across the District and 1,262 bed spaces (7% of the total) is provided by self-catering accommodation.

2.2.3 Chichester University also provides bed and breakfast accommodation from the end of June to first week of September each year. The Chichester campus offers a total of 456 single rooms to conference delegates and others staying overnight for business or other purposes. It also has a further 223 single room in its Bognor Regis campus site.

Table 3: Bed space capacity across Chichester District

	Rooms/Units/Pitches	Bed space
Serviced accommodation	1,874	3,060
Caravan/camping/holiday park accommodation	4,137	14,173
Self-catering/holiday let accommodation	281	1,262
Group accommodation	456	456
Total capacity	6,748	18,951

Figure 1: Bed space capacity by accommodation type

2.3 Tourism businesses in the City of Chichester

2.3.1 Of the 455 tourism business identified during this study, 77 accommodation businesses and 17 visitor attractions are located in the city. The IDBR does not publish results at tiers lower than Local Authority area so it is not possible to establish the size of tourism stock in relation to total businesses in the city.

2.3.2 However, for this study, the District Council did provide a list of all businesses paying business rates in the PO19 area which covers the city areas, and this established that there are 1,373 businesses paying business rates in the PO19 area. Whilst there are some types of businesses which do not pay business rates, e.g. farm buildings and businesses run from home, and thus will not appear on the list, it still provides a useful way for measuring the scale of tourism businesses in relation to total businesses in the city Based on the information available, tourism businesses in the PO19 area make up 6.8% of total businesses in this area.

2.4 Distribution of tourism businesses

Distribution of number of accommodation businesses

2.4.1 When we review the distribution of tourism business across the district, a fifth of visitor accommodation businesses are located in PO19 which covers the city boundary along with Fishbourne.

2.4.2 Well over a third (36%) of visitor accommodation businesses are located in PO20 which covers the towns and villages of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, and Eastergate.

2.4.3 PO18 which includes the towns and villages of Bosham, Boxgrove, Eartham, EastDean, Goodwood, Funtington, Nutbourne is home to a quarter (23%) of visitor accommodation businesses in the District.

Figure 2: Map of accommodation across District

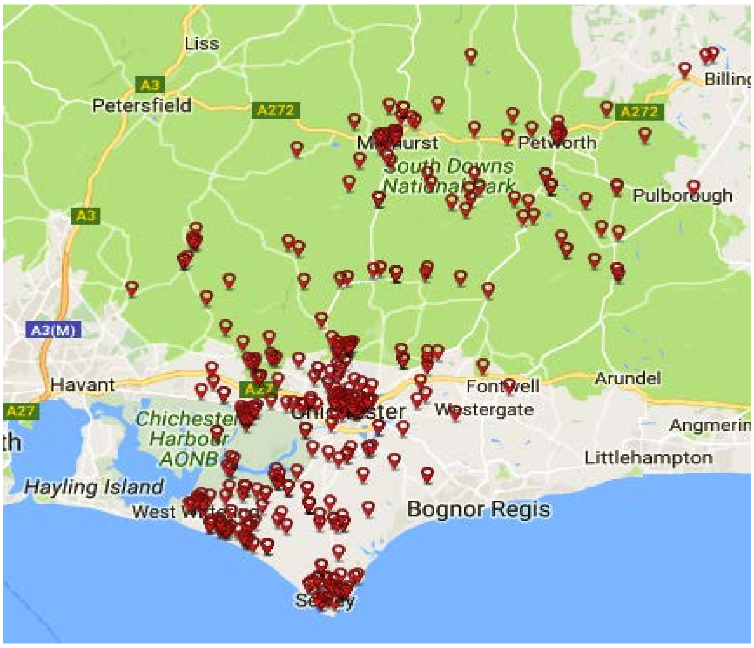
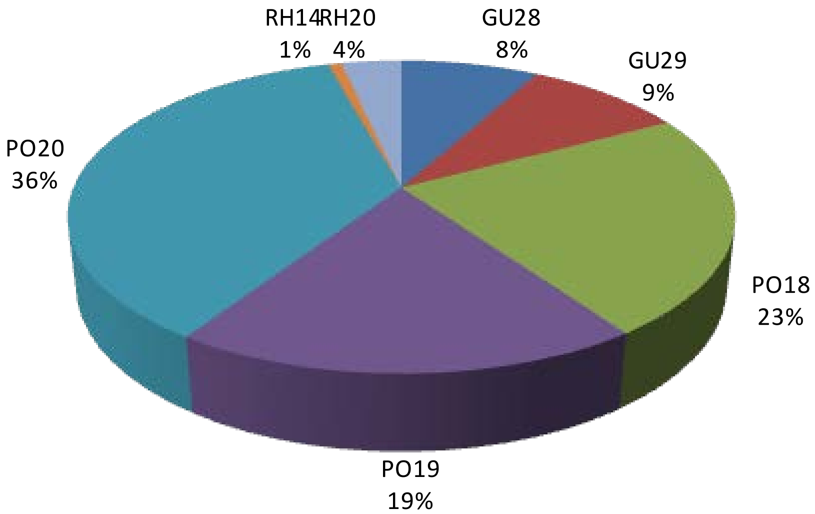


Figure 3: Distribution of total accommodation by postcode sector



2.4.4 The rural towns of Petworth and Midhurst are home to 8% and 9% respectively of the District's visitor accommodation businesses. Smaller proportions of visitor accommodation businesses are spread across the remaining parts of the District.

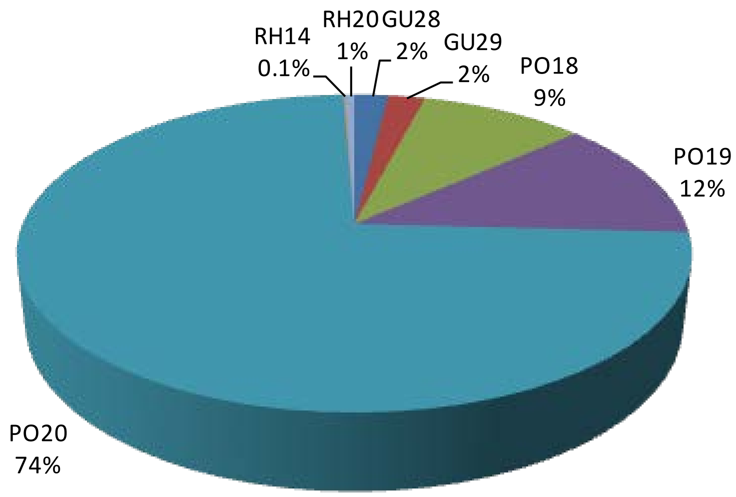
Table 4: Distribution of accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	10	12	20	19	13	1	7	82
Camping and Caravan Site	1	1	9	1	30	0	0	42
Group accommodation	0	0	0	1	0	0	0	1
Guest Houses	2	2	7	4	7	0	2	24
Hotel	0	3	2	5	2	0	0	12
Pubs with rooms	9	1	11	8	4	0	2	35
Self catering/holiday lets	10	18	43	37	89	2	3	202
Serviced studios/ apartments	0	0	0	2	0	0	0	2
Grand Total	32	37	92	77	146	3	14	401

Distribution of bed space capacity

2.4.5 Three quarters of total bed space across the District is in PO20. This heavy concentration is based on the fact that most of the District's camping, caravanning and holiday parks are based in the PO20 area and these include large sites like Bunn Leisure Holiday Park, Scotts Farm Caravan park, Holdens Farm Caravan Park, and White Horse Caravan Park.

Figure 4: Distribution of total bed space by postcode sector



2.4.6 A half (53%, 1,163 bed spaces out of 3,060) of all serviced accommodation bed space in Chichester District is located in the city/PO19 areas.

Table 5: Distribution of bed space by accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	37	62	100	107	71	4	39	420
Camping and Caravan Site	180	20	779	75	13,119	0	0	14,173
Group accommodation	0	0	0	456	0	0	0	456
Guest Houses	41	28	170	666	66	0	13	984
Hotel	0	187	335	718	73	0	0	1,313
Pubs with rooms	57	8	102	102	14	0	40	323
Self catering/holiday lets	56	93	303	195	590	14	11	1,262
Serviced studios/ apartments	0	0	0	20	0	0	0	20
Grand Total	371	398	1,789	2,339	13,933	18	103	18,951

2.4.7 Comparisons with other similar local authority areas, shows that the district has a similar number of serviced accommodation businesses and bedstock as Canterbury. It also shares with Canterbury a similar number of non-serviced accommodation and bedstock.

Table 6: Bed space capacity benchmark table

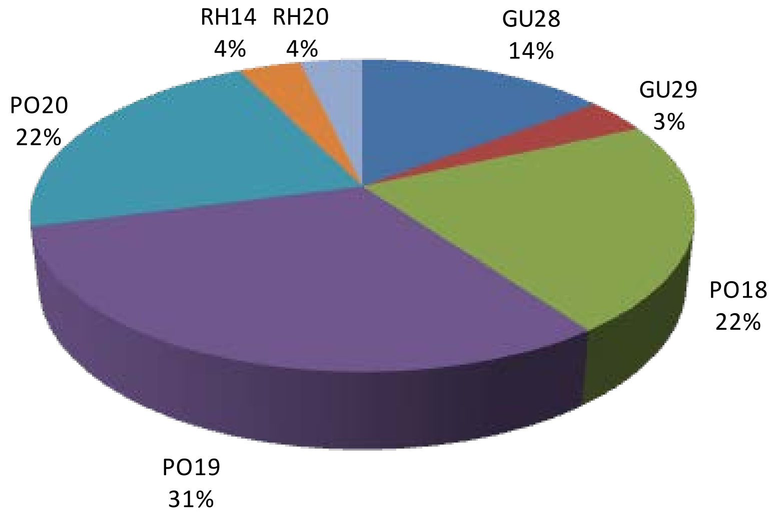
	No. of serviced accommodation businesses	No. of non-serviced accommodation businesses	Total bedspace capacity in serviced accommodation	Total bedspace capacity in non-serviced accommodation
Chichester	**155**	**245**	**3,060**	**15,891**
Bath	230	245	7,826	4,192
Canterbury	153	356	3,190	15,741
Exeter	89	68	5,941	6,055
Lewes	89	58	1,459	2,420
St Albans	45	7	2,145	31
Stratford on Avon	169	89	8,479	729
Winchester	180	59	5,110	4,220
York	250	201	10,581	4,274

Note: The comparative data is based on district boundaries for each local authority.

Distribution of visitor attractions

2.4.8 A third (17 attractions) of all visitor attractions are located in the City/PO19 area. A fifth are located in the PO20 area and a further fifth are located in the PO18 area.

Figure 5: Distribution of visitor attractions by postcode sector



2.4.9 The distribution across the district by postcode sector and type of attraction is presented in Table 7 overleaf.

Table 7: Distribution of visitor attractions by type by postcode sector

Postcode sectors	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
Activity Operator	2		2					4
Arts Centres				2				2
Racecourses & Tracks			1					1
Activity operator			2	2	2	1		7
Farms					2	1		3
Gardens		1	1		1		1	4
Historic Building/Houses	3	1	1	3			1	9
Leisure / Theme Parks	1							1
Museum / Art Galleries	1		1	5	3			10
Museums / Art Galleries	1		2	3	1			7
Places of Worship				1				1
Theatre				1				1
Wildlife Attraction					2			2
Workplace Attractions			2					2
Grand Total	8	2	12	17	11	2	2	54

3 Economic importance of tourism

3.1 Volume and value of tourism – national and regional picture

3.1.1 Results from GBTS reveal that 102.7 million domestic overnight trips were taken in England in 2015, an increase of 10% compared with 2014. The value of domestic overnight trips increased by 8%, from £18 billion to £19.6 million in 2015. Reflecting the national trend, the volume and value of domestic overnight trips in the South East also increased in 2015 compared to 2014. The volume of domestic overnight trips increased by 5% and trip expenditure also increased by 5%.

3.1.2 According to results from IPS, overseas visitors made a total of 31.8 million overnight trips in England, an increase of 7% compared with 2014. Trip expenditure increased by 2% at the national level. Overseas visitor trip volume was also up for the region; total overnight trips taken by visitors from overseas to the South East increased by 11% and trip expenditure increased by 4%.

3.1.3 Figures published in the Great Britain Day Visits Survey (2015) indicate that there were 1.3 billion Tourism Day Visits undertaken in England during 2015 (down 3% compared to 2014). Despite a small drop in volume, spend per head was slightly up, leading to an increase in day trip expenditure of 1%. The picture at regional level was rather different; the region saw a far greater fall in tourism day trips in 2015 compared to 2014. Day trip volume at regional level dropped by 5% and day trip expenditure dropped by 12%.

3.1.4 Overall, total trip volume in the South East (overnight and day) dropped by 4% and total trip expenditure dropped by 6%.

Table 8: Tourism trip volume and expenditure: national and regional

Trips by domestic overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	17,040,000	16,200,000	5%	102,730,000	93,000,000	10%
Nights	45,560,000	43,700,000	4%	299,570,000	273,000,000	10%
Spend	£2,570,000,000	£2,448,000,000	5%	£19,571,000,000	£18,085,000,000	8%
Trips by overseas overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	5,141,000	4,648,000	11%	31,820,000	29,824,000	7%
Nights	37,350,000	34,645,000	8%	241,427,000	232,846,000	4%
Spend	£2,242,000,000	£2,160,000,000	4%	£19,427,000,000	£19,081,000,000	2%
Trips by day visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	216,000,000	227,000,000	-5%	1,298,000,000	1,345,000,000	-3%
Spend	£6,696,000,000	£7,571,000,000	-12%	£46,422,000,000	£46,024,000,000	1%
Total trips						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	238,181,000	247,848,000	-4%	1,432,550,000	1,467,824,000	-2%
Spend	£11,508,000,000	£12,179,000,000	-6%	£85,420,000,000	£83,190,000,000	3%

3.2 Volume and value of tourism – Chichester

3.2.1 At destination level, tourism volume and value is monitored using tourism impact models. In West Sussex and across the South East, the Cambridge Model is used to help destinations track trends. Regular tracking has not been carried out for Chichester, and to establish a baseline, a new study was commissioned.

3.2.2 Based on the findings of the Cambridge Model, an estimated 571,000 overnight trips were taken to Chichester District in 2015 and overnight visitors spent approximately £132.3 million on their visit to the District. Day trips amounted to 5.6 million and generated a further £189.2 million in trip expenditure. In total, around £321.5 million was spent on trips to Chichester in 2015 by overnight and day visitors.

Table 9: Tourism trip volume and expenditure across District

	Total visitors	Total visitor expenditure
Domestic overnight visitors	447,701	£76,131,324
Overseas overnight visitors	123,352	£56,150,214
Day visitors	5,657,883	£189,240,307
Total visitors	6,228,936	£321,521,845

Note: Results based on 2015 Cambridge Model study

3.2.3 With the addition of multiplier expenditure and other trip-related expenditure, the total value of tourism activity across the District in 2015 is estimated to have been around £411.4 million.

3.2.4 This income to the local economy is estimated to have supported around 5,810 Full-Time Equivalent Jobs across the District. Many of these jobs are part-time or seasonal in nature and translate into an estimated 8,037 Actual Jobs. According to the Office of National Statistics, there were 56,900 employee jobs across the District in 2015. Based on these estimates, total tourism related expenditure supported 14% of these jobs.

Table 10: Total trip value (incl. Multipliers) across District

Total business turnover (incl. multiplier)	£411,429,000
Total jobs sustained	8,037
% of jobs in district	14%

Note: Results based on 2015 Cambridge Model study

3.2.5 Comparative data reveal that overall volume and value (see Table 9) is similar to Canterbury and Exeter.

Table 11: Tourism volume and trip expenditure benchmark table (1)

	Number of overnight domestic trips	Number of overnight overseas trips	Number of domestic day trips	Overnight domestic trip expenditure	Overnight overseas trip expenditure	Domestic day trip expenditure
Chichester	**447,701**	**123,352**	**5,657,883**	**£76,131,324**	**£56,150,214**	**£189,240,307**
Bath	803,000	236,000	5,680,000	£179,000,000	£103,132,000	£194,000,000
Canterbury	427,000	175,000	5,960,000	£58,000,000	£76,475,000	£178,200,000
Exeter	530,000	110,000	5,890,000	£85,000,000	£48,070,000	£221,680,000
Lewes	228,000	63,000	3,011,000	£31,191,000	£25,495,000	£90,077,000
St Albans	199,000	64,000	1,270,000	£16,000,000	£27,968,000	£38,000,000
Stratford on Avon	499,000	144,000	4,360,000	£98,000,000	£62,928,000	£131,000,000
Winchester	285,000	71,000	5,401,000	£48,261,000	£32,361,000	£193,609,000
York	1,250,000	223,000	10,320,000	£327,169,000	£313,758,000	£400,160,000

Note: The comparative data is based on district boundaries for each local authority.

Note: Visitor volume and expenditure data for other local authority areas comes from District level breakdowns we obtained from the national tourism surveys specifically for this exercise and not from Cambridge Model studies.

Table 12: Tourism volume and trip expenditure table (2)

	Total trip volume	Total trip expenditure
Chichester*	**6,228,936**	**£321,521,845**
Bath	6,719,000	£476,132,000
Canterbury	6,562,000	£312,675,000
Exeter	6,530,000	£354,750,000
Lewes	3,302,000	£146,763,000
St Albans	1,533,000	£81,968,000
Stratford on Avon	5,003,000	£291,928,000
Winchester	5,757,000	£274,231,000
York	11,793,000	£1,041,087,000

3.3 Economic impact of city attractions

3.3.1 There are 54 visitor attractions across the District, and 17 of these are based in the City/PO19 area. The main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium.

3.3.2 A study of the economic impact of these attractions on the economy show that in together these attractions generate £15.7 million annually for businesses across the City, District and the wider region.

Table 13: Economic impact of city attractions

Expenditure	Chichester Cathedral	Festival Theatre	Pallant House	The Novium	Total
City	£5,213,920	£7,700,328	£1,258,170	£471,619	£14,644,037
Wider district and region	£454,414	£519,073	£87,480	£50,676	£1,111,643
Total	£5,668,334	£8,219,401	£1,345,650	£522,296	£15,755,681
FTE jobs					
City	78.5	87.7	21.1	7.1	194.4
Wider district and region	7.4	8.4	1.4	0.8	18.0
Total	85.8	96.2	22.5	7.9	212.4

Chichester Cathedral:
Generates £5.6m/Sustains 85.8 FTE jobs

Festival Theatre:
Generates £8.2m/Sustains 96.2 FTE jobs

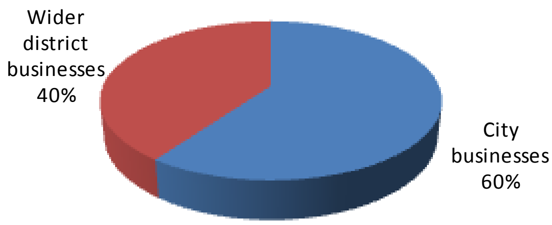
Pallant House:
Generates £1.3m/Sustains 22.5 FTE jobs

The Novium:
Generates £522,300/Sustains 7.9 FTE jobs

4 Tourism business survey

4.1 Respondent business profile

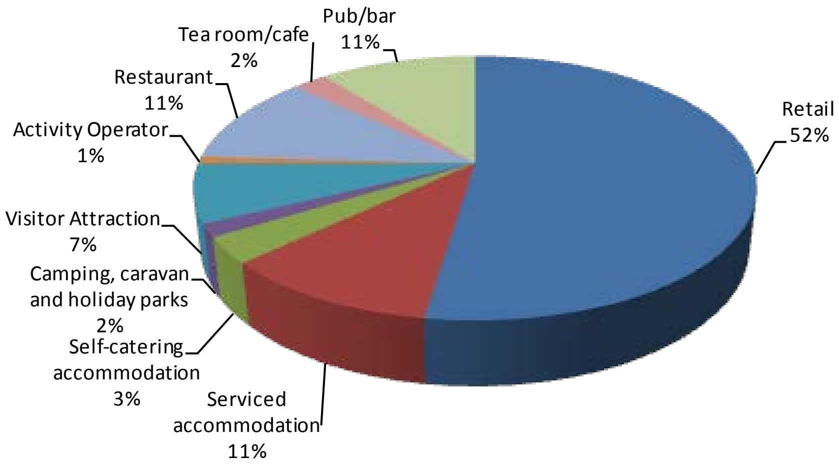
Figure 6: Distribution of business sample by city and wider district



4.1.1 Tourism and hospitality businesses from across the district were contacted by phone and invited to take part in a survey to find out about their trading levels and city businesses are additionally asked about their perceptions of the city.

4.1.2 In total, 252 businesses took part in the survey. 60% were city businesses and 40% were businesses operating elsewhere in the district. Around half of the sample was made up of retail businesses and many of these were shops based in the city.

Figure 7: Distribution of business sample by business type



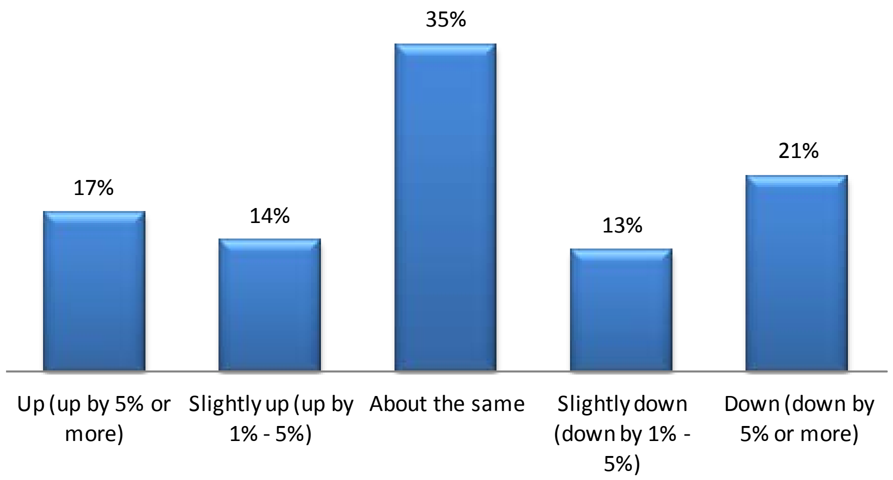
4.1.3 Around half of the sample was made up of retail businesses and many of these were shops based in the city (65% of all the retail businesses taking part in the survey were based in the city).

Figure 8: Distribution of business type by city and wider district

4.2 Business performance

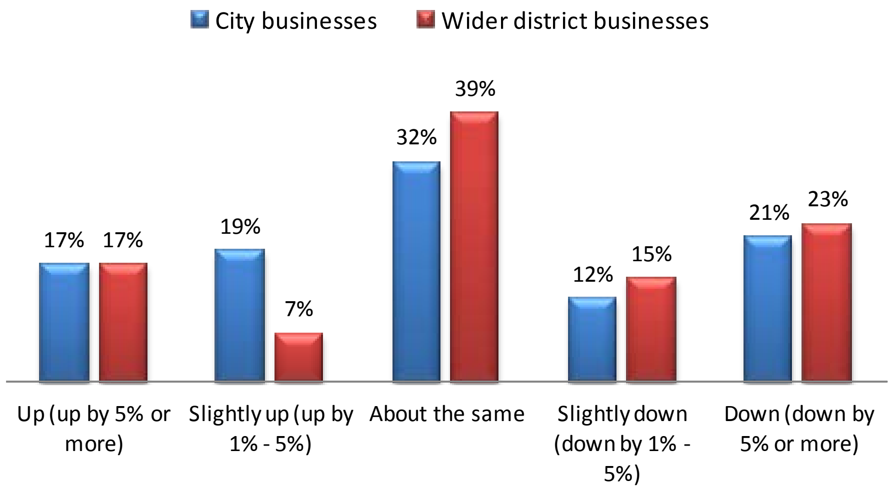
4.2.1 Feedback from businesses on trading levels from the start of the year to end of July compared to the same period last year, reveals that around a third (31%) saw performance go up or slightly up, another third (35%) experienced no significant change, and a third (34%) saw performance go down or slightly down.

Figure 9: Business performance Jan to Jul 2016 compared to last year



4.2.2 Results split between city and wider district businesses reveal that performance was generally higher among city businesses.

Figure 10: Business performance Jan to Jul 2016 compared to last year by city and wider district



4.2.3 Results by business type are presented in Table 11 below. However, it is not possible to draw any clear cut insights as the samples for some business types are very small.

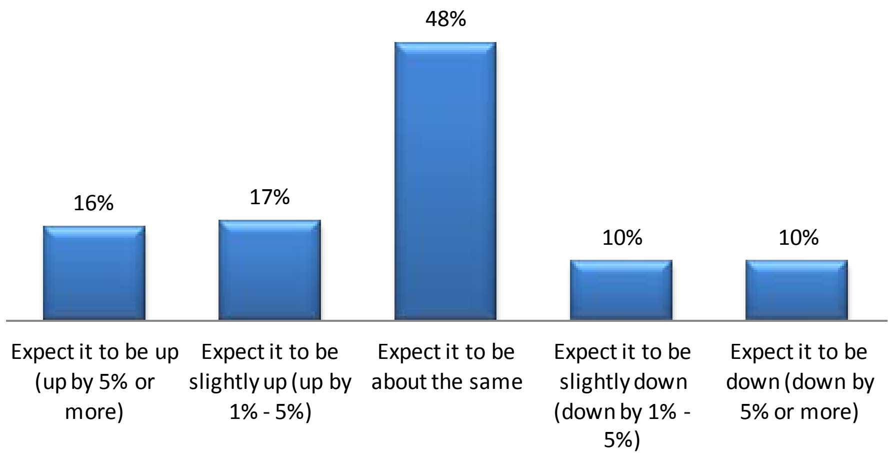
Table 14: Business performance Jan to Jul 2016 compared to last year by business type

Performance has been:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	15%	13%	25%	28%	50%	21%	0%	22%
Slightly up	17%	7%	0%	0%	6%	0%	21%	33%	4%
About the same	29%	33%	25%	50%	61%	50%	36%	33%	44%
Slightly down	17%	15%	13%	0%	0%	0%	11%	0%	11%
Down	23%	30%	50%	25%	6%	0%	11%	33%	19%

4.3 Expectations for rest of year

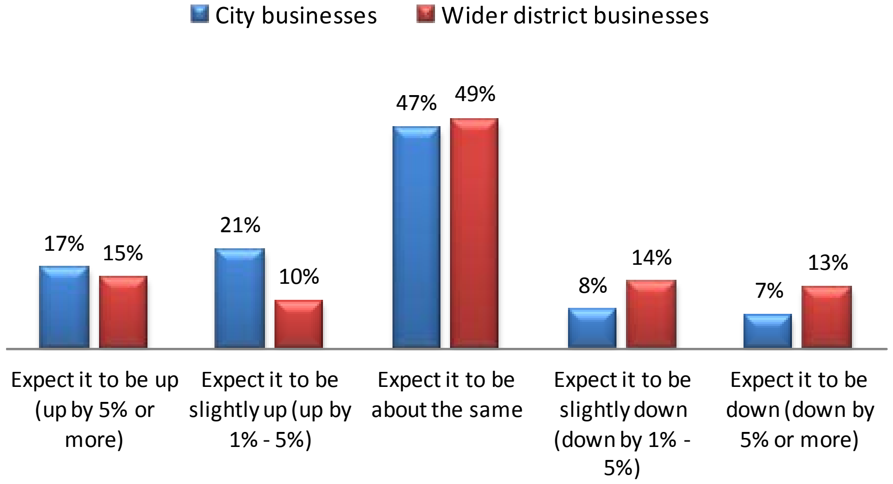
4.3.1 Looking ahead to the rest of the year, just under half (48%) of all businesses expect performance to be similar to the year before.

Figure 11: Expectations of business performance for the rest of the year



4.3.2 The same results split between city and wider district businesses reveal that city businesses are generally more optimistic about the year ahead.

Figure 12: Expectations of business performance for rest of this year by city and wider district



4.3.3 Results by business type are presented in Table 12 below. As indicated earlier, caution needs to be applied in the interpretation of the results given the small samples for some business types.

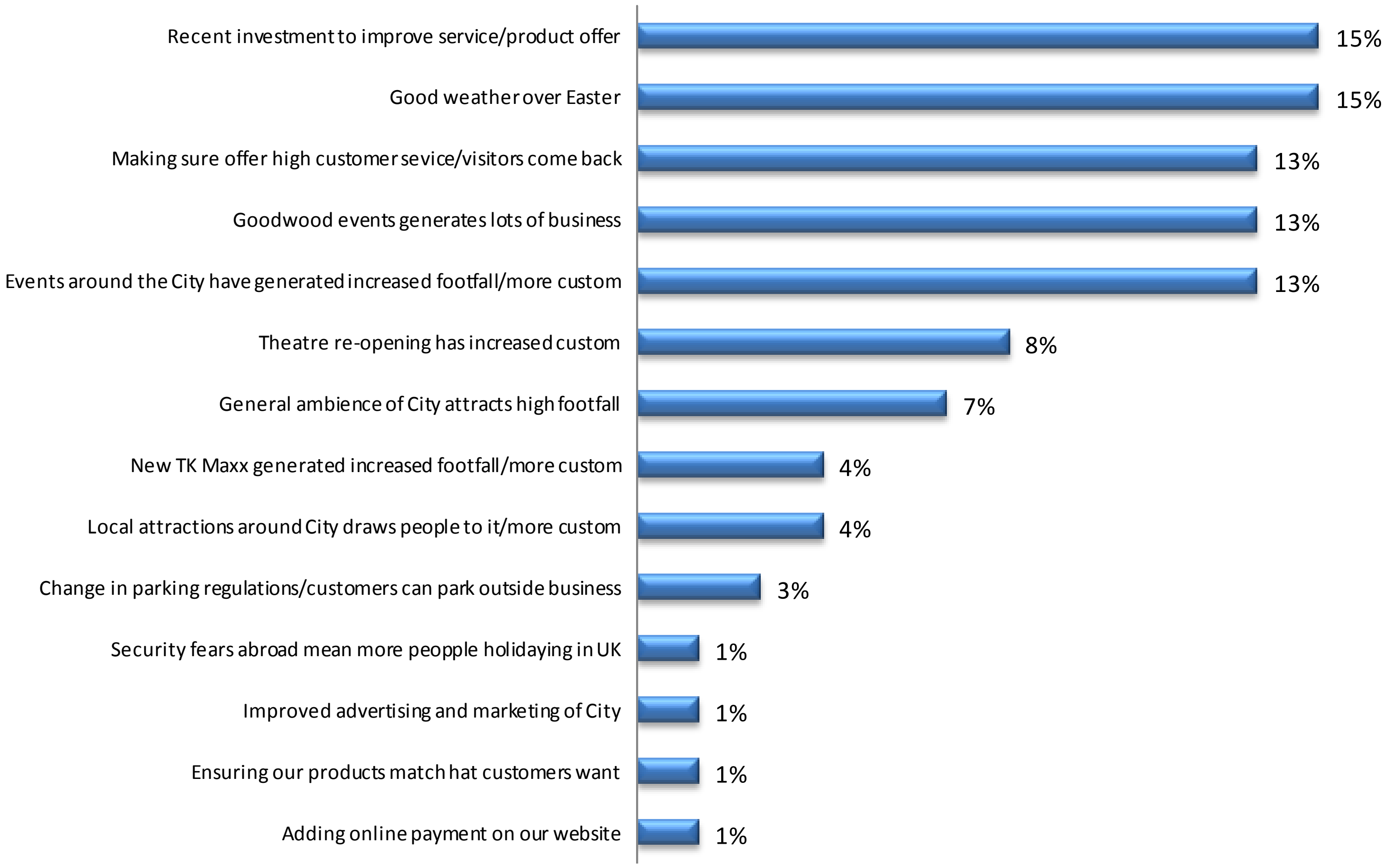
Table 15: Expectations of business performance for rest of this year by business sector

Expect performance to be:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	7%	0%	25%	11%	50%	36%	17%	19%
Slightly up	20%	15%	38%	0%	11%	0%	14%	0%	7%
About the same	47%	59%	13%	25%	67%	0%	39%	50%	52%
Slightly down	9%	11%	25%	50%	11%	0%	4%	17%	11%
Down	10%	7%	25%	0%	0%	50%	7%	17%	11%

4.4 Main factors behind increase in performance

4.4.1 Recent investments in the business and good weather over Easter were to two main factors mentioned the most often by businesses for the improvement seen in performance since the start of the year.

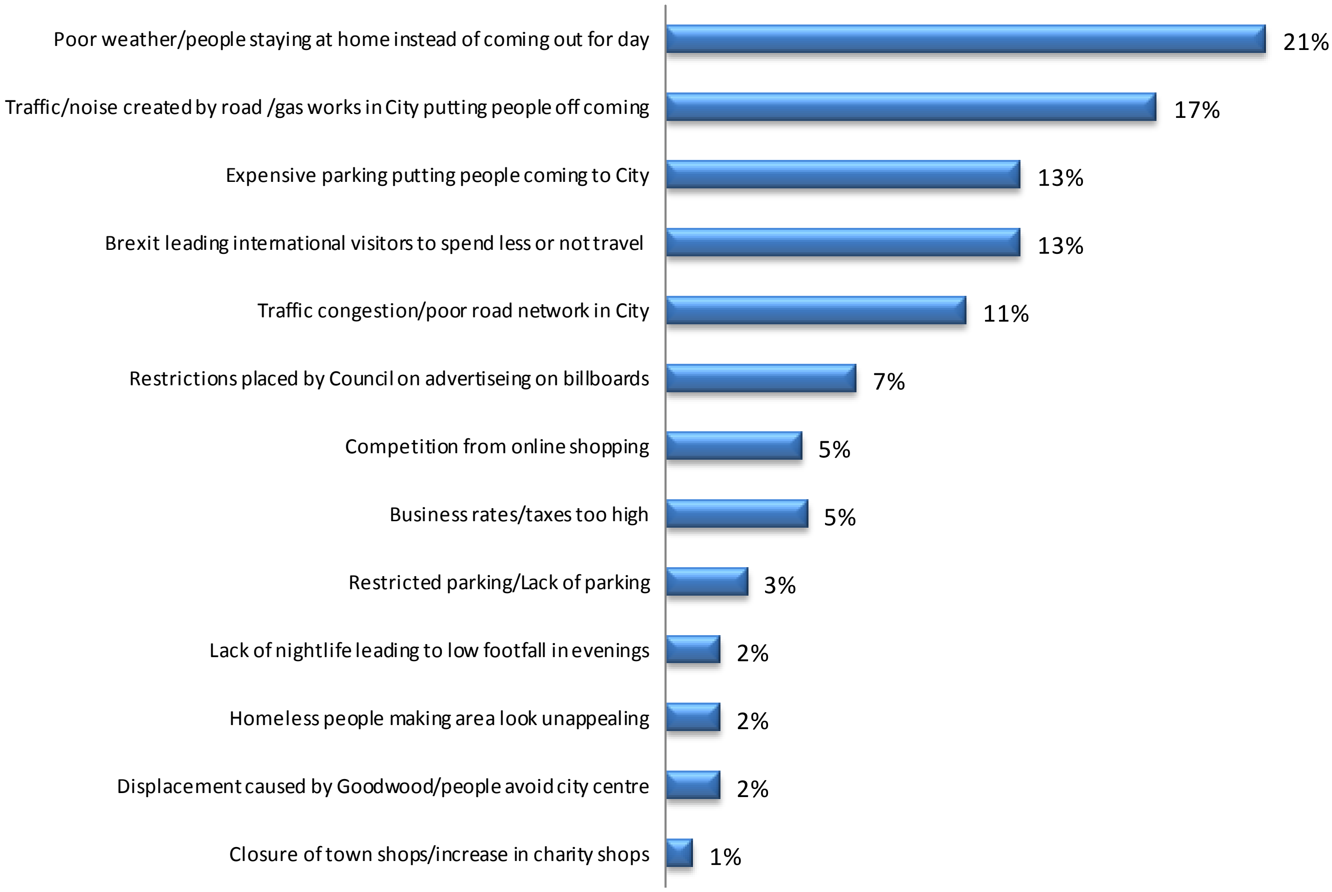
Figure 13: Main factors behind increased in performance



4.5 Main factors behind drop in performance

4.5.1 With the exception of good weather over parts of the Easter period, the country generally experienced an unseasonably cold spell up to May and the month of June is claimed by some to have been the wettest June since records began. July too experienced unsettled weather conditions for much of the first half of the month, with a short hot spell between the 17th and 23rd. In view of this, it is not surprising to see that a fifth of businesses blamed the weather on a fall in trade over the first six months of the year.

Figure 14: Main factors behind drop in performance



4.6 Key issues likely to affect future trade

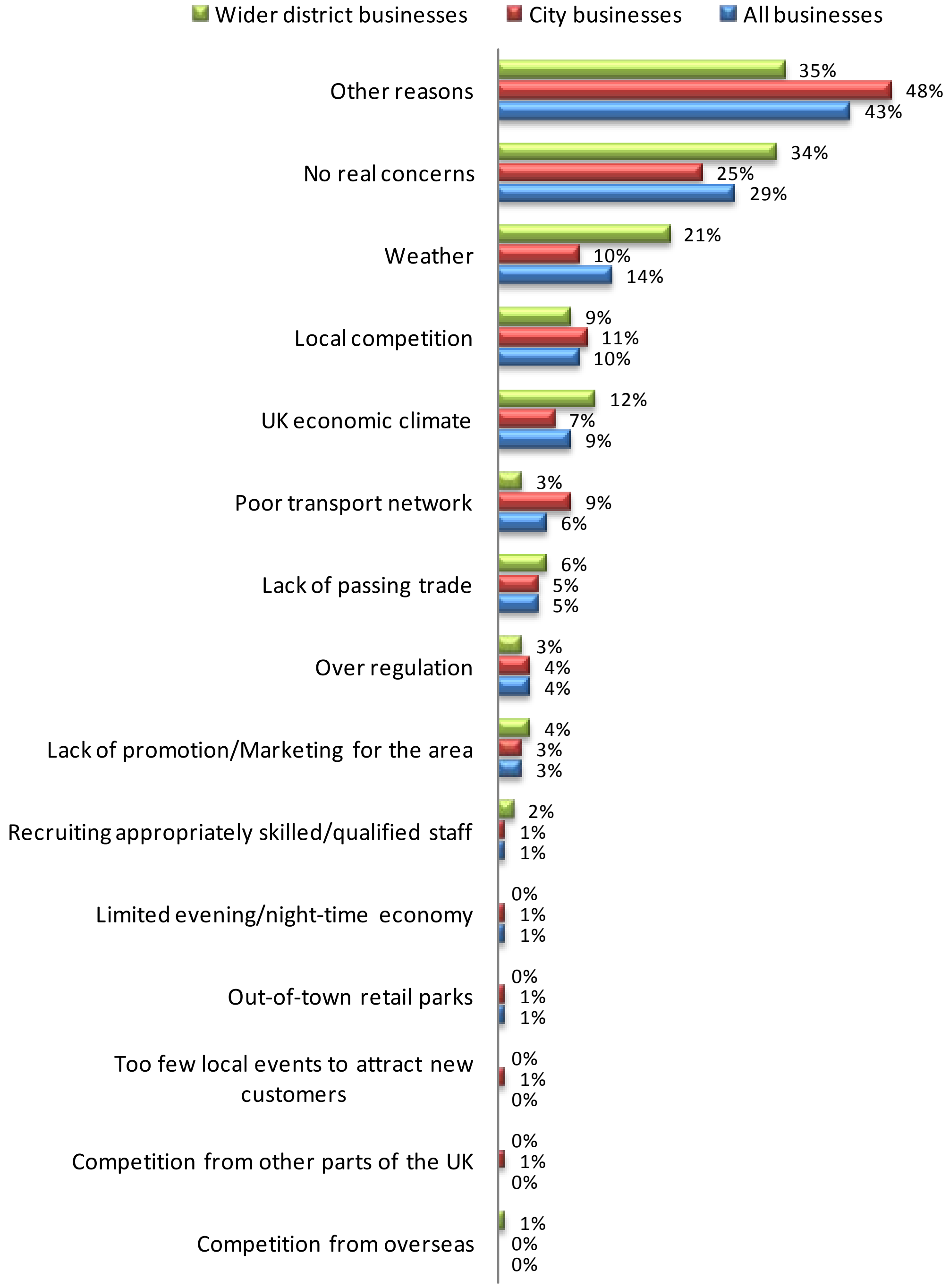
4.6.1 Businesses were asked about the key issues they felt would affect the future performance of their business. To help manage responses a number of possible factors affecting performance were presented on a list and businesses were asked to select those that applied to them.

4.6.2 Just under a third of all businesses (29%) replied that there were no specific issues they could see which would affect their future performance.

4.6.3 Overall 14% of businesses replied that they are affected by weather conditions and would continue to be so in the future. The proportion is higher for wider district businesses where more are outdoor attractions and camping/caravanning parks which are more seasonal in their operations are located. Local competition and the state of the UK economic climate are factors which 1 in 10 businesses believe will affect their future performance.

4.6.4 Overall 5% of businesses believe that a lack of passing trade will affect future performance. The main reason for the lack of passing trade among city businesses is the belief that fewer people will visit the city centre in the near future as a result of more online shopping and out of town shopping centres. Other reasons blamed for the lack of passing trade is the perceived lack of parking for visitors and expense of parking.

Figure 15: Key issues believed to affect current and future business performance



4.6.5 Overall, a third of businesses (87 out of the 252, 35%) felt that there were ‘other’ factors which would impact on future performance. Verbatim responses were taken and the analysis of these reveals that a fifth feel that the cost of parking in the city would put visitors off coming.

4.6.6 The EU referendum took place during the survey period and the immediate impact was very strong for a proportion of tourism and hospitality businesses; 14% of those businesses providing ‘other’ responses felt that leaving the EU could lead to economic uncertainty, as a result of existing customers spending less and fewer new visitors from EU member countries.

4.6.7 An equal proportion also felt that the disruption to trade caused by the ongoing road works on A27 was affecting current performance and would do so until the road works were completed.

4.6.8 The perceived high costs of business rates and business rents and the traffic congestion in and around the city were also other factors affecting trading levels mentioned by a number of businesses.

Table 16: ‘Other’ issues believed to affect current and future performance

Expensive parking which is putting visitors coming into the city centre	20%
Impact of Brexit/creating uncertainty/could be fewer foreign visitors	14%
The ongoing road/gas works which is causing significant disruption	14%
High cost of business rates and rents	13%
Traffic congestion in and around city and on A27 putting people coming to city	10%
Competition from online retailers	8%
Council forcing us to remove our front of building A frame advertising	8%
Lack of parking in this area/nowhere convenient to park so customer don’t stop	6%
Absence of a nightlife means footfall is very low in the evenings	1%
Customers are becoming more demanding/struggling to meet those demands	1%
Lack of large department stores which draw people to the city centre	1%
Lack of signage - people don't know we are here	1%
Large out of town events like Goodwood Festival take people away from the city centre	1%
Rising staffing costs	1%
The amount of homeless people on street which is putting people off visiting city centre	1%

Note the responses in Table 16 are based on the 35% of businesses which mentioned ‘Other’ issues.

4.7 Changes seen in profile of customers

4.7.1 Business were asked if they had seen any changes in their customer base in recent years. The vast majority, 87% reported that no significant changes had been observed.

4.7.2 Among the 13% of businesses who had experienced changes, a third observed that customers have been generally spending less than they use to.

Table 17: Changes seen in customer profile

Base	33
Customers generally spending less than they use to	32%
fewer young visitors/students	14%
customers getting more demanding	11%
Customers getting younger	11%
Fewer foreign customers	7%
B&Bs old fashioned for young/customers are now 50 plus	4%
Customers expect us to stay open for longer/open in evenings now	4%
More customers from London	4%
More customers shopping with us online	4%
More last minute bookings/customers leaving it until last minute	4%
More retired customers	4%
More wedding business	4%

Note low sample – only 33 businesses

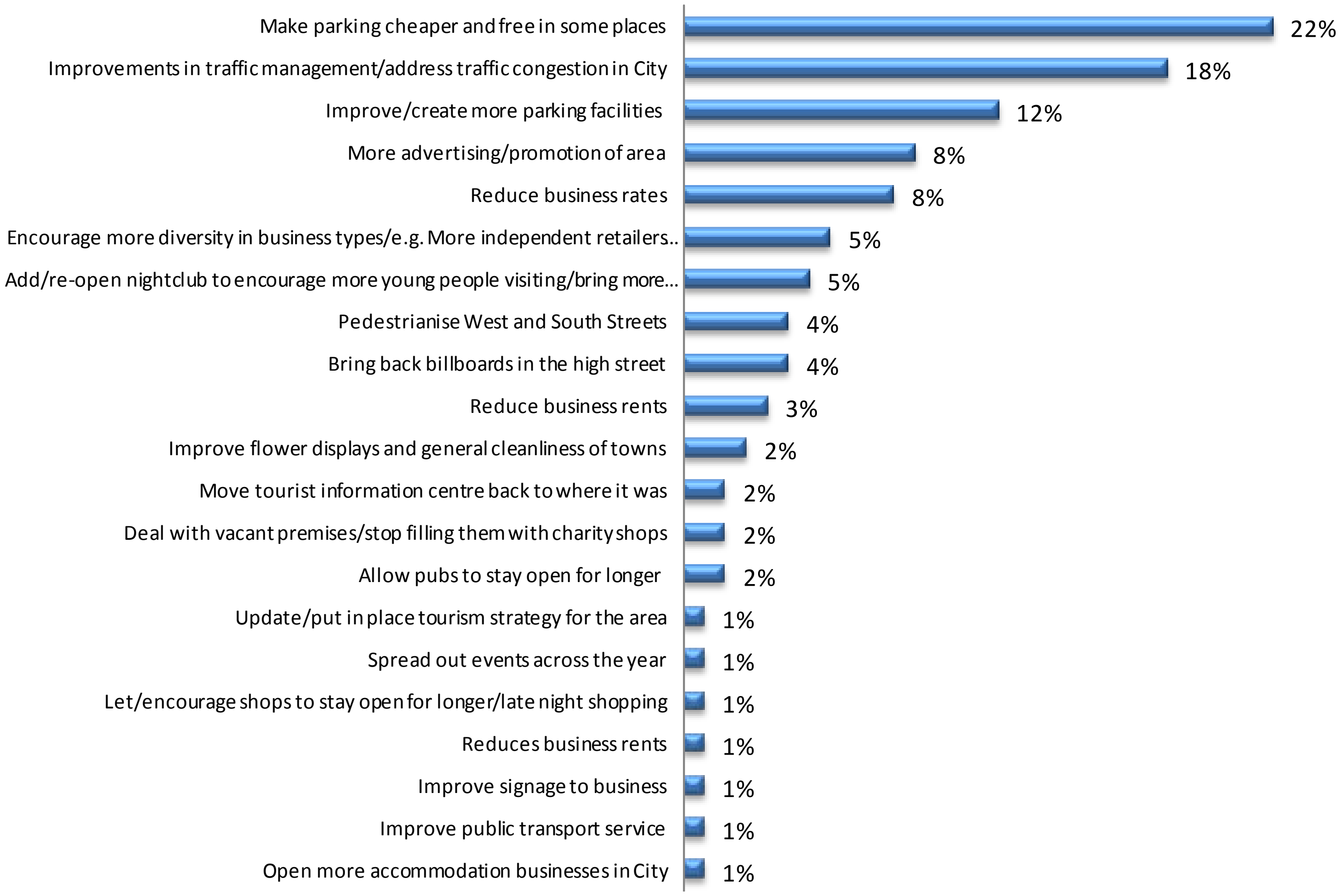
4.8 Key changes businesses would like to see implemented

4.8.1 Businesses were asked which changes if implemented they believed would improve the performance of their own business and the local economy more generally.

4.8.2 A fifth believe that making parking cheaper and free in some places would encourage more visitors to the area and by improving footfall would enhance the opportunities for more trade.

4.8.3 Just under a fifth wanted to see improvements to managing traffic and improving the road network to address the traffic congestion and bottlenecks seen at particular times of the day.

Figure 16: Key changes business would like to see implemented



4.9 Business perceptions of Chichester City

4.9.1 City businesses were asked a specific set of questions about their perceptions of the city. They were asked what they thought were the best and worst things about the city. This was an ‘open-ended’ question and the verbatim results were analysed and grouped into specific areas. The results presented in Fig. 17 and Fig. 18 have been weighted by the frequency in which they were mentioned to reveal the aspects of the city that are seen to be the most important.

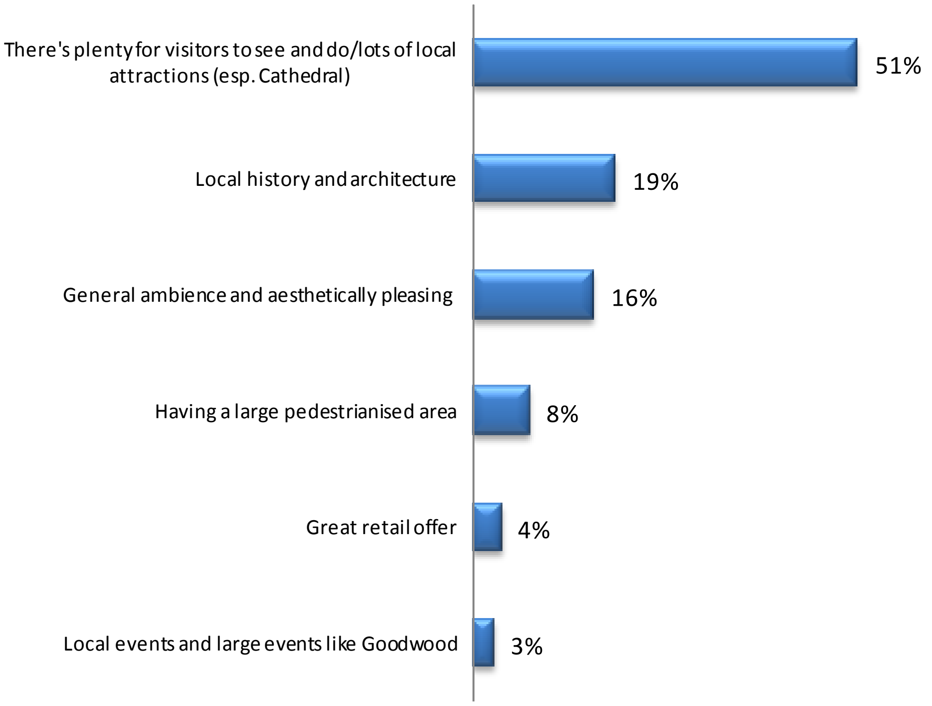
4.9.2 From the perspective of city businesses, the wide range of things to do and see in and around the city was the top ‘best’ thing about the city. Mentioned by a half of all city businesses, this aspect was seen as a positive feature that benefited everyone visiting the city – both locals and tourists. Many references were made to city attractions, particularly the Cathedral and the range of events.

There's a cinema and a gym and good historical things to visit, it's got everything a tourist would want really.

The best things are the tourist attractions. The Cathedral is a big draw. The Festival Theatre and Goodwood motor circuit always bring people in.

The Cathedral, the Festival Theatre, Pallant House, its proximity to the coast and South Downs, and easy access to London.

Figure 17: Best things about the city



4.9.3 For a fifth of city businesses, the heritage and historical architecture of the city is the best thing about the city. Other ‘best’ things mentioned were the ambience and attractiveness of the city (mentioned by 16% of businesses), the advantages offered to visitors and shoppers of a large pedestrianised area, making it easy to get around on foot (mentioned by 8% of businesses), the diverse and high quality shops (mentioned by 4% of businesses) and the hosting of local events and large events like Good Festival (mentioned by 3% of businesses).

4.9.4 When businesses were asked what they thought was the worst thing about the city, a wider range of responses was provided. The most frequently mentioned aspect was the view that the city suffers from very heavy traffic congestion which many felt acted as a deterrent to people visiting the city.

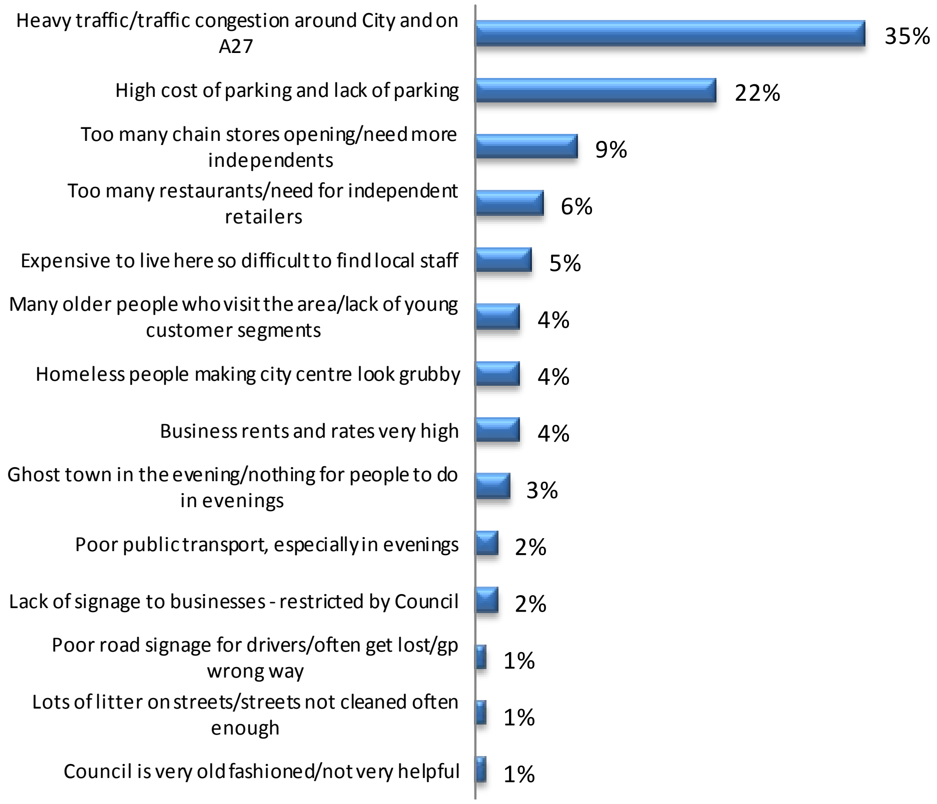
4.9.5 The perceived high cost of parking, a view which was often combined with the opinion that the city lacked adequate parking provision was the second most ‘worst’ thing about the city (mentioned by a fifth of businesses).

The A27 is a nightmare. It is always snared up. It needs to be more fluid and they need to stop talking and put their plans to tackle it into practice.

The main issue is getting people into the city. The A27 is not fit for purpose anymore and so it makes it very hard to get in and out of Chichester.

The car parking is very bad. It’s too expensive and inconvenient.

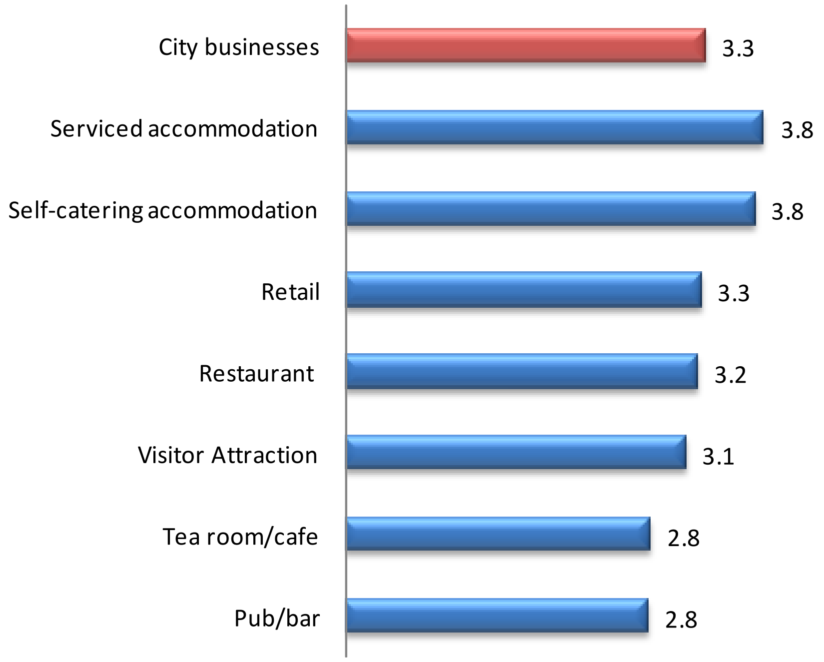
Figure 18: Worst things about the city



4.9.6 The final perception question posed to businesses was where on a scale of ‘vibrancy’ (ranging from 1 to 5) did they think Chichester City sits. The scale was ‘Behind the times/old fashioned’ at one end of the scale (rating of 1) and ‘vibrant and cosmopolitan’ is at other (rating of 5).

4.9.7 The overall average rating score provided by city businesses was 3.3 out of 5, indicating that most felt that the city sat somewhere in the middle of the vibrancy scale. Results by sector show that serviced accommodation businesses tend to see the city as being more cosmopolitan and vibrant than the other business types.

Figure 19: Vibrancy rating scale



5 Visitor survey

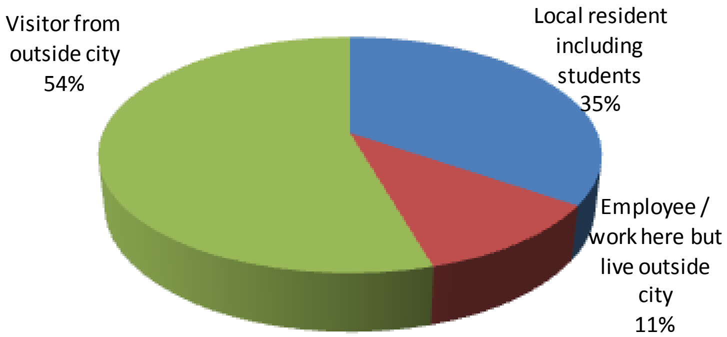
5.1 Visitor profile

Type of visitor

5.1.1 Just over half of the visitor sample is made up of visitors who live outside the City of Chichester (54%). Local residents including students living in the city (35%) and employees who work in the city but live elsewhere (11%) make up the other half.

5.1.2 The sample for employees is too small to provide separate results so for clarity and ease of reporting, residents, including students living in the city and employees are grouped together as 'Residents' in the tabulated results.

Figure 20: Type of visitor



Visitor origin/normal place of residence

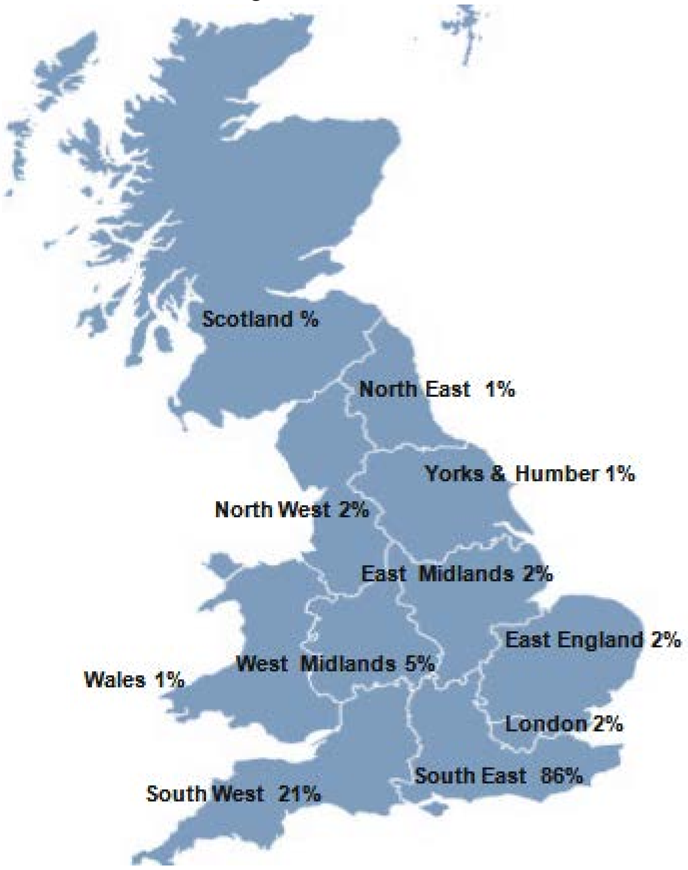
5.1.3 Among visitors from outside the city, the vast majority (95%) came from other parts of the UK and half of these come from Sussex and a quarter come from Hampshire. At regional level, 86% of visitors are from the South East.

5.1.4 At town level, around a fifth of city visitors were found to come from neighbouring towns within the district, mainly the PO20 and PO18 postcode areas of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, Eastergate, Bosham, Boxgrove, Eartham, East Dean, Goodwood, Funtington, and Nutbourne (see Appendices for a full list of towns).

Table 18: Top ten counties domestic visitors come from

	486
Sussex (East and West)	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%

Figure 21: Region of residence among domestic visitors



5.1.5 A relatively small proportion of visitors were from overseas and the main countries of residence are Australia, the USA and Germany. At only 5%, this is lower than a number of other historic cities, and lower than the 10% of overseas visitors found to make up the visitor market during the previous visitor survey in 2008. The proportion is, on the other hand, the same as that found in the 2005 visitor survey. In light of this, the proportion of overseas visitors appears to have returned to the 2005 level. We should highlight, however, that the 2005 visitor sample was only 223 and therefore, will carry a relatively high margin of error.

Table 19: Trends in proportion of overseas visitors

	% of overseas visitors
2016	5%
2008	10%
2005	5%

Source: City level visitor surveys carried out by TSE Research

Table 20: Proportion of overseas visitors in other historic cities

	% of overseas visitors
Bath	28%
Oxford	42%
York	15%

Source: 2015 vsurveys identified from open sources

Visitor age

5.1.6 The age profile of visitors is older than residents; 59% are aged 55 years and over compared to 38% of residents. Visitors to the city are also more likely to be retired than visitors who are city residents.

Table 21: Visitor age profile

	Overall	Resident	Visitor
Base	892	405	487
0-15 years	3%	1%	4%
16-24 years	14%	19%	9%
25-34 years	14%	20%	10%
35-44 years	9%	9%	9%
45-54 years	16%	15%	16%
55-64 years	18%	12%	23%
65+ years	32%	26%	36%

Table 22: Proportion of retired visitors

	Overall	Resident	Visitor
Base	892	404	488
Yes	30%	23%	36%
No	70%	77%	64%

Group size and composition

5.1.7 Two thirds of local residents visit the city centre on their own. A third of visitors from outside the city also visit on their own and another third visit with their partner/spouse.

Table 23: Group composition

	Overall	Resident	Visitor
Base	891	404	487
By myself	49%	69%	33%
With family	16%	12%	20%
With partner/spouse	24%	11%	34%
With friends and family	4%	3%	5%
With friends	6%	4%	8%
Work colleague/Business associate	0%	1%	0%

5.1.8 The average group size among visitors is 1.9 people.

Figure 22: Average visitor group size

Visitor socio-economic status

5.1.9 A quarter of resident and non-resident visitors to the city are from AB occupational grades (this includes retired people as the grade is based on their previous occupations). The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

5.1.10 The largest group come from the C1 grade which is made up of supervisory, clerical, and junior managerial and junior administrative occupations (42% overall, 45% residents and 40% visitors), and a further quarter are from the C2 occupational group (skilled manual works).

5.1.11 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 10% of city visitors.

Table 24: Visitor occupational grade

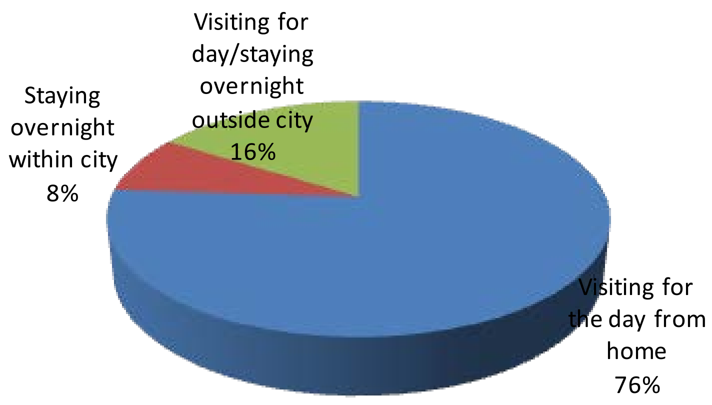
	Overall	Resident	Visitor
Base	856	388	468
AB	24%	24%	25%
C1	42%	45%	40%
C2	22%	16%	25%
DE	12%	15%	10%

5.2 Trip features

Day and overnight tourist visitors

5.2.1 The vast majority of visitors are on a day trip; 76% are visiting from their homes and a further 16% are visiting for the day whilst staying overnight outside the city during holiday and other purposes. Only 8% of visitors were found to be staying overnight in the city. This low in comparison to a number of other historic cities and a fall on the 13% found to be staying overnight in the city in 2008[2].

Figure 23: Proportion of day and overnight visitor



[2] *The earlier 2005 study found that 37% of visitors were staying in the city. However, as we have established the survey was based on a sample of only 223 visitors and the interviewing period also stretched all the way to October. In view of the small sample and different survey period, the results are not directly comparable and will contain a high margin of error and are not reliable to use for trend purposes.*

Proportion of overseas visitors in other historic cities

	% of overnight visitors
Bath	56%
York	49%

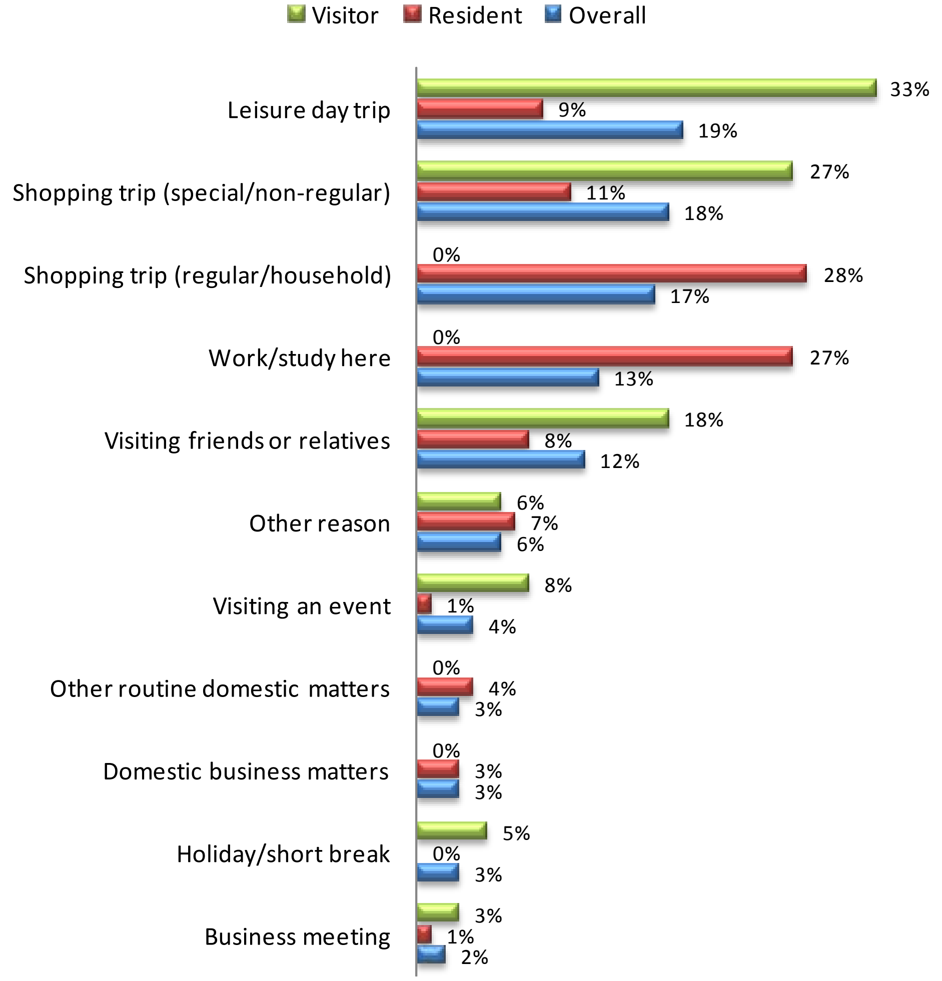
Source: recent surveys identified from open sources

Main reason for visiting

5.2.2 The survey found that there are two main reasons why visitors from outside the city visit the city; these are a leisure day out (33%) and a special shopping trip (27%).

5.2.3 The main reasons residents visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

Figure 24: Main reasons for visiting



Length of stay

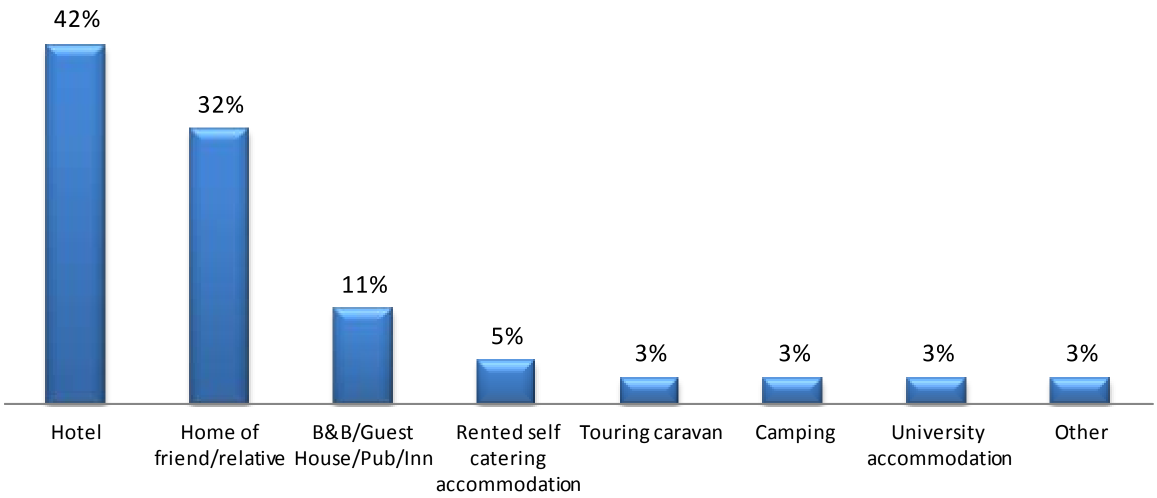
5.2.4 Day visitors spend on average 3.4 hours on their trip to the city and overnight visitors staying in the city spend on average 3.9 nights on their trip.

Figure 25: Average length of stay

Accommodation used

5.2.5 The types of accommodation used the most often by overnight visitors are hotels (42%) and the home of friends or relatives (32%).

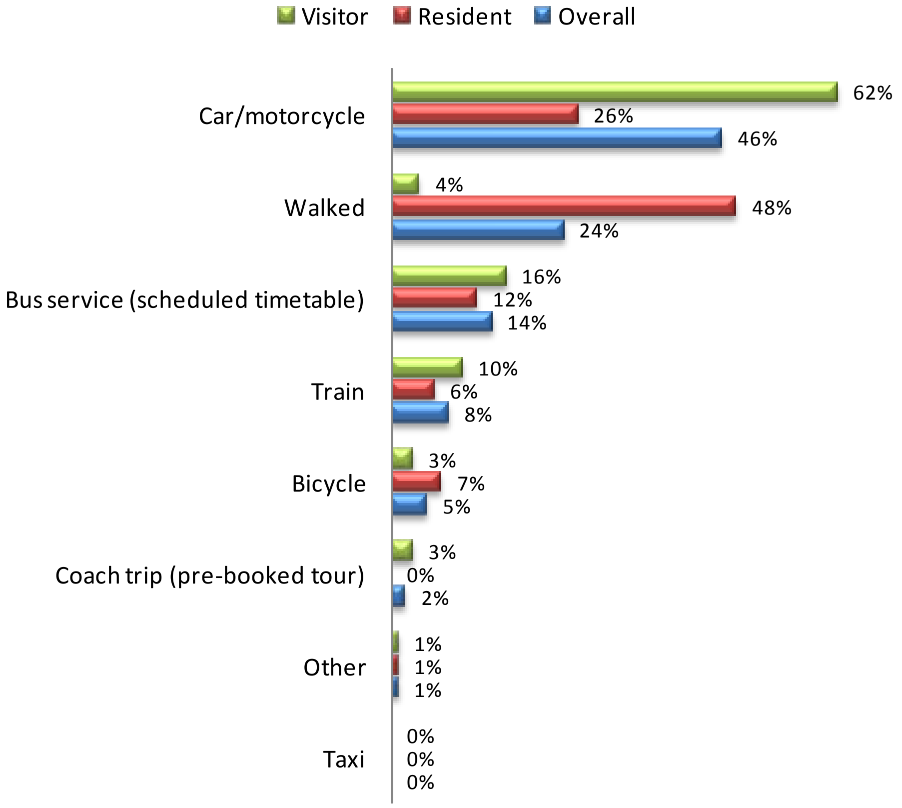
Figure 26: Type of accommodation used



Main mode of transport used to travel

5.2.6 The car is the most common mode of transport used to reach the city among visitors (62% of visitors travel by car). Residents are more likely to walk from their home in the city to the city centre (48% of residents walk), though a quarter travel to the city centre by car.

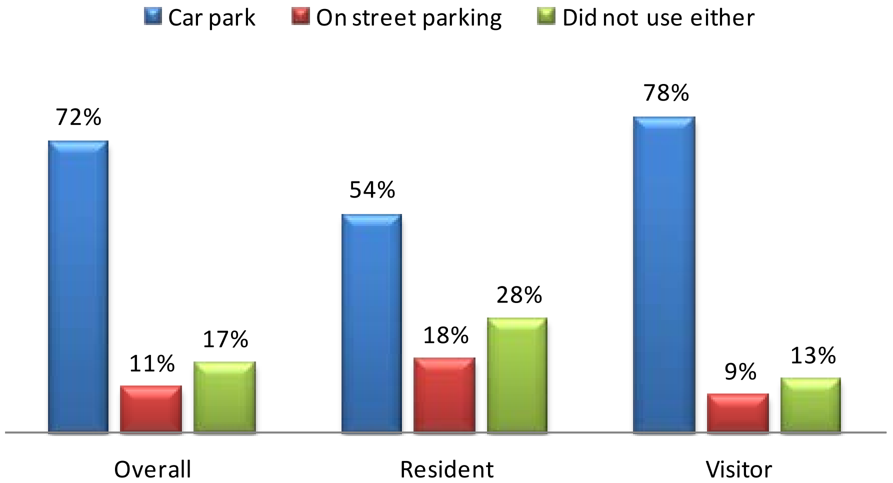
Figure 27: Type of accommodation used



Use of car parks

5.2.7 Three quarters of all visitors and just over a half of all residents who travelled by car used one of the city centre car parks during their visit.

Figure 28: Use of city parking



5.2.8 A wide range of city centre car parks were used, however, the two used most commonly used were Northgate and Cattle Market.

Table 25: City car parking used

	Overall	Resident	Visitor
Base	288	55	233
Northgate	26%	22%	27%
Cattle Market	23%	31%	21%
Avenue De Chartres	13%	13%	12%
Can't recall	8%	11%	8%
East Pallant/Cawley Priory	5%	4%	5%
New Park Road	4%	0%	5%
Little London	3%	4%	3%
Basin Road	3%	4%	3%
Baffins Lane	2%	2%	3%
Orchard Street	2%	2%	2%
St Cyriacs	2%	0%	3%
Market Road	2%	4%	2%
Westgate	2%	2%	3%
South Pallant	1%	4%	1%
Market Avenue/St John's Road	1%	0%	2%
Market Avenue/South Pallant	1%	0%	1%

Frequency of visits

5.2.9 As may be expected, frequency of visits to the city centre is relatively high among local residents with three quarters visiting the city centre every day.

5.2.10 Among visitors from outside the city, a fifth were found to be visiting the city centre for the first time.

Table 26: Frequency of visits

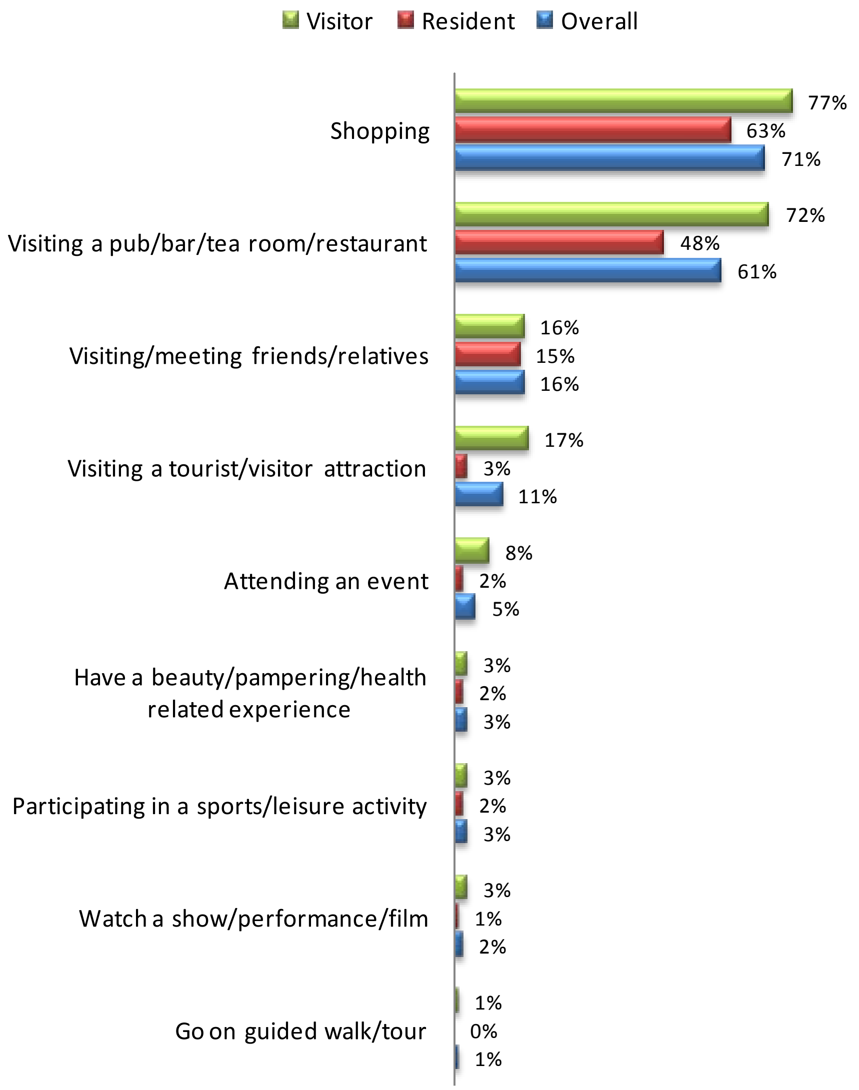
	Resident	Visitor
Base	403	486
Never, first visit	-	22%
At least once before	-	6%
2 to 4 times before	0%	10%
5 to 10 times before	0%	10%
Visit monthly	3%	19%
Visit weekly	18%	29%
Visit almost daily (live or work here)	77%	-
Last visit more than 12 months ago	0%	4%

Activities undertaken/plan to undertake

5.2.11 The most popular past time among visitors whilst visiting the city are shopping (undertaken by 77% of visitors) and visiting an establishment providing food and drink (71%). Both these two activities were also highly popular among residents.

5.2.12 Visiting a tourist attraction in the city was undertaken by 17% of visitors and only 3% of residents during their visit. A small proportion of visitors attended an event during their visit (8%, compared to 2% of residents).

Figure 29: Activities undertaken/planned to undertake



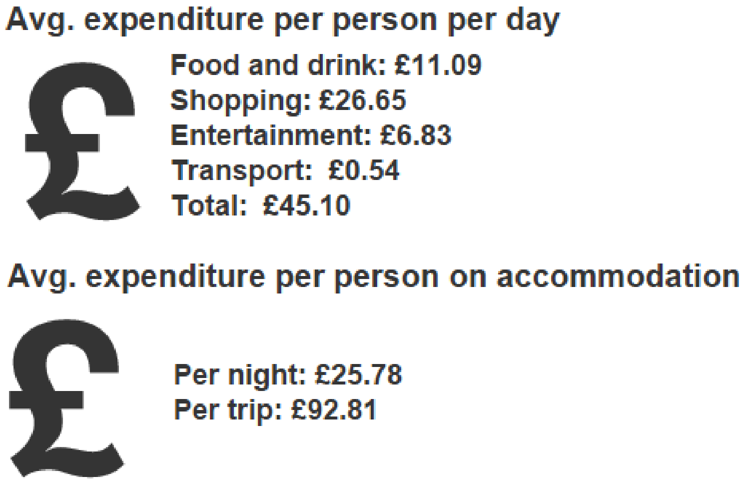
Average trip expenditure

5.2.13 On average, visitors from outside the city (excl. accommodation) spent £45.10 per day during their visit. The largest purchase area was shopping.

5.2.14 Visitors staying overnight in the city incurred an additional cost of £25.78 per night and £92.81 per trip on accommodation. With an average trip length of 3.9 nights, total average expenditure among overnight visitors per trip (incl. food and drink etc.) comes to £255.17.

5.2.15 It should be noted that these average expenditure figures per person per day are somewhat different to the Cambridge Model estimates for the district and are due to the differences in the methodology used to extract the figures.

Figure 30: Average trip expenditure



5.2.16 Comparable expenditure data from recent (2015) visitor surveys are available for two other historic cities. These are Bath and York. The total average expenditure per day per person is higher among Bath visitors but lower among York visitors.

5.2.17 Average expenditure on accommodation per night is much higher for both Bath and York.

Table 27: Average visitor expenditure in other historic cities

	Avg. spend per day (all visitors and excl. Accommodation)	Avg. spend per person per night on accommodation
Bath	£57.81	£44.94
York	£34.69	£44.60

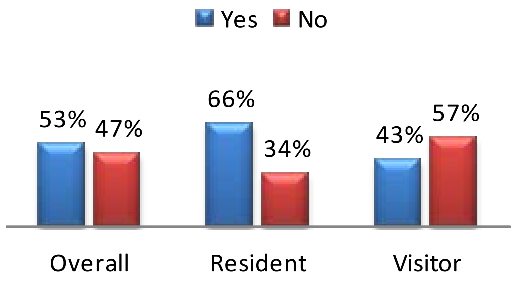
5.3 Evening economy

5.3.1 Two thirds of all residents and 43% of visitors from outside the city visit the city for leisure purposes in the evening.

5.3.2 The main reason for visiting in the evening is to have a meal in one of the city's restaurants followed by visiting one of its pubs or wine bars.

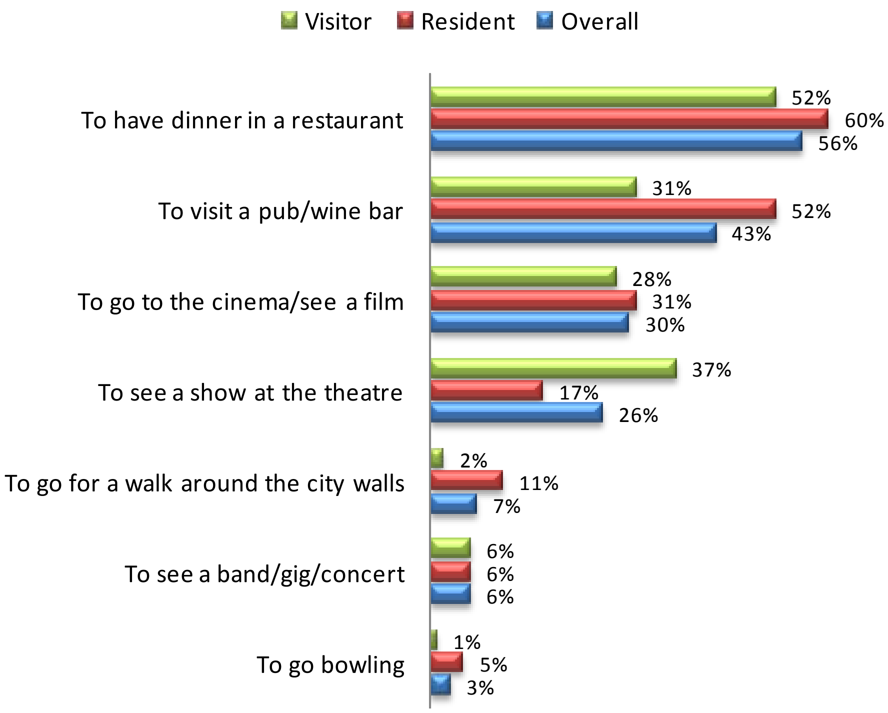
5.3.3 Around a third of all visitors (residents and visitors from outside the city) also come to visit one of its two cinemas.

Figure 31: Whether visit city centre in evening



5.3.4 Visiting Festival Theatre is popular among visitors from outside the city; 37% come to watch a show/performance at the theatre in the evenings.

Figure 32: Reasons for visiting city centre in evening



5.3.5 The main reason residents gave for not visiting the city in the evening for leisure purposes was that they do not generally go out in the evenings. A number of visitors from outside the city also gave this reason and the response needs to be set against the relatively older age profile of visitors.

5.3.6 The main reason for not visiting the city in the evening provided by visitors was that the city was too far to travel for a night out. This is a response that will have come from day visitors. Around 1 in 10 visitors have not visited in the evening simply because they are unaware about what there is to do in the city in the evenings and a similar number are prevented from visiting because of a perceived lack of public transport to the city in the evening.

Table 28: Reasons for not visiting city centre in evening

	Overall	Resident	Visitor
Base	413	137	276
I don't tend to go out in the evening	41%	55%	35%
Too far, prefer to go out in the evening close to where I live	32%	11%	42%
Don't know much about what there is to do in the evening here	9%	4%	11%
There is a lack of public transport to travel to the city centre in the evening	8%	4%	9%
Prefer to go elsewhere for evening leisure/entertainment/socialising	6%	9%	5%
Does not have enough things to do and see in the evening	4%	7%	3%
I am worried about my personal safety (fear of crime)	4%	9%	2%
Does not have the range or quality of places to eat and drink I would like	2%	3%	1%
Place simply does not appeal to me for a visit in the evening	1%	2%	0%
Simply have not had time to visit in the evening	1%	1%	1%
Other	1%	2%	1%
Shops not open late	0%	1%	0%

5.4 Visitor perceptions

5.4.1 When residents and visitors were asked about the factors which were the most important in influencing them to visit the city centre that day, two thirds of residents provided responses not already listed on the questionnaire. The main response from residents to this question was that the trip to the city centre was influenced by the simple fact that they lived close by and visited the centre to conduct routine domestic activities.

5.4.2 Among visitors, the most important factor influencing the visit was the fact that they had visited previously and enjoyed the visit enough to want to visit again (selected by 44% of visitors). The most important factor influencing the decision to visit for just under a fifth of visitors was the presence of specific shops they like to visit and for another 10% of visitors it was the fact that their friends and relatives live in the city. ‘Other’ factors influencing the visit provided by visitors included the fact that the trip was simply part of the itinerary of the coach tour they were on, or that they were in the area on business, or taking part in a sporting event.

Important factors influencing decision to visit

Table 29: Factor most important in influencing decision to visit

	Overall	Resident	Visitor
Base	889	403	486
Other influences to be specified	40%	69%	10%
Visited before and wanted to come back	27%	10%	44%
City has specific type of shops I like to visit	16%	13%	18%
Friends/family live here and visiting them	8%	6%	10%
Visiting an attraction/number of attractions	5%	1%	8%
Visiting to attend a specific event	3%	0%	5%
Recommended by friend/relative/colleague/others	2%	0%	4%
Passing through having visited a nearby attraction, town or event	1%	0%	2%

Best things about the city

5.4.3 As with the question posed to city businesses, residents and visitors were asked about the best and worst things about the city.

5.4.4 A range of factors were mentioned by visitors when they were asked to comment on the best things about the city. The factors mentioned the most often are listed in the table below and a full list can be found in the Appendices.

5.4.5 The best thing about the city centre mentioned most often was its shopping offer (mentioned by 37% of visitors overall (both residents and visitors from outside the city).

Table 30: Top 10 best things about city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Compactness of city centre – easy to get from one side to another	8%

Note results above are combined responses from both residents and visitors from outside the city

Worst things about the city

5.4.6 A relatively large number of visitors surveyed (residents and visitors from outside the city) did not have any negative comments to make about the city; overall 41% did not provide a response when asked to list the worst things about the city.

5.4.7 Among those who did provide a response, the worst things about the city are parking charges (mentioned by a fifth of all visitors) followed by traffic in the city (mentioned by 16% of all visitors). A full list of responses can be found in the Appendices.

Table 31: Top 10 worst things about the city

Parking availability and charges	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive place to live and visit	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27 – getting here is difficult	5%

Note results above are combined responses from both residents and visitors from outside the city

Aspects most strongly associated with Chichester

5.4.8 When visitors were asked about what they most strongly associated with the city, the response provided by the vast majority of residents and visitors was the Cathedral. Eight out of 10 visitors thought of the Cathedral when they thought of Chichester.

5.4.9 Shopping, Festival Theatre, Goodwood, the heritage of the city, its historical buildings, and its parks and open spaces are other aspects a significant proportion of residents and visitors associated with the city.

Table 32: Aspects most strongly associated with Chichester

	Overall	Resident	Visitor
Base	889	403	486
The Cathedral	83%	84%	82%
Shopping	39%	34%	43%
Theatre	37%	39%	36%
Goodwood	36%	45%	29%
Heritage/History	34%	34%	34%
Parks & Open Spaces/Gardens	27%	34%	21%
Arts & Culture	17%	21%	14%
The street markets	16%	18%	14%
The University	15%	19%	11%
Events	5%	5%	4%
Nightlife	4%	4%	4%
Outdoor sports	2%	3%	1%
Other associations to be specified	1%	1%	1%
Warmth of welcome	0%	0%	0%
Ease of access/strong transport links connectivity	0%	0%	0%

Visitor rating on vibrancy scale

5.4.10 When residents and visitors were asked to rate the ‘vibrancy’ of the city on a scale of 1 to 5 where 1 depicts the city as being ‘Behind the times/old fashioned’ and 5 depicts the city as ‘vibrant and cosmopolitan’, most went for an middle ‘average’ rating. The scores are broadly similar to that provided by city businesses.

5.4.11 Residents provided an average score of 3.0 out of 5 and visitors provided an average rating of 3.3 out of 5.

Figure 33: Visitor rating on vibrancy

5.5 Visitor satisfaction

Parking

5.5.1 Residents and visitors were found to be generally more satisfied with the ease of parking than the cost of parking. The latter received relatively average scores.

Table 33: Satisfaction rating on ease of parking

	Resident	Visitor
Avg. score out of 5	4.5	4.6
Very difficult	3%	1%
Quite difficult	3%	4%
Neither particularly difficult or easy	4%	2%
Quite easy	22%	24%
Very easy	68%	69%

Table 34: Satisfaction rating on cost of parking

	Resident	Visitor
Avg. score out of 5	3.1	3.7
Very expensive	15%	3%
Quite expensive	12%	10%
About average	31%	25%
Reasonable	31%	40%
Very reasonable	12%	22%

Accommodation

5.5.2 Among visitors staying overnight in commercial accommodation in the city, the majority described the range, quality and value for money of accommodation as ‘Very good’.

Table 35: Satisfaction rating on accommodation

	Quality of service	Value for money
Base	27	27
Mean	4.4	4.4
Very poor	-	-
Poor	-	-
Average	15%	15%
Good	26%	26%
Very good	59%	59%

Visitor attractions & other places to visit

5.5.3 Satisfaction with visitor attractions and other places to visit was generally higher among visitors than residents. Visitors gave the range, quality and value for money of places to visit average scores of 4 out of 5. Residents scored the quality of service found at attractions at a similar level as visitors, but range and value for money fell a little below this.

Table 36: Satisfaction rating on attractions and other places to visit - residents

Residents	Range	Quality of service	Value for money
Base	331	331	331
Mean	3.9	4.2	3.8
Very poor	1%	1%	1%
Poor	5%	1%	7%
Average	22%	15%	27%
Good	41%	44%	38%
Very good	30%	38%	27%

Table 37: Satisfaction rating on attractions and other places to visit - visitors

Visitors	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.2	4.4	4.2
Very poor	0%	0%	0%
Poor	2%	1%	2%
Average	15%	10%	17%
Good	44%	39%	41%
Very good	38%	50%	40%

Places to Eat & Drink

5.5.4 The mean average scores were generally high among both residents and visitors for places to eat and drink in the city. Residents and visitors where satisfied the most with the range of places to eat and drink; 73% of residents and 70% of visitors rated the range of places to eat and drink as 'Very Good'.

Table 38: Satisfaction rating on places to eat and drink - residents

Resident	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.6	4.4	4.0
Very poor	1%	1%	2%
Poor	2%	0%	4%
Average	5%	13%	22%
Good	19%	34%	37%
Very good	73%	53%	35%

Table 39: Satisfaction rating on places to eat and drink - visitors

Visitor	Range	Quality of service	Value for money
Base	426	403	406
Mean	4.6	4.5	4.3
Very poor	0%	0%	0%
Poor	1%	0%	2%
Average	6%	7%	15%
Good	24%	34%	37%
Very good	70%	59%	47%

Shops

5.5.5 Higher satisfaction scores on range, quality of shopping environment, and quality of service were provided by visitors than residents. A higher proportion of residents scored these three measures of shopping in the city as 'Average'. Overall, however, satisfaction was either 'Good' or 'Very good' among both residents and visitors.

Table 40: Satisfaction rating on shops - residents

Resident	Range	Quality of shopping environment	Quality of service
Base	396	396	396
Mean	3.9	4.2	4.2
Very poor	2%	1%	1%
Poor	8%	2%	1%
Average	23%	13%	15%
Good	34%	41%	42%
Very good	33%	43%	41%

Table 41: Satisfaction rating on shops - visitors

Visitor	Range	Quality of shopping environment	Quality of service
Base	456	456	456
Mean	4.4	4.5	4.5
Very poor	0%	0%	0%
Poor	2%	1%	1%
Average	11%	5%	4%
Good	34%	36%	39%
Very good	53%	57%	56%

Ease of finding way around

5.5.6 Resident's and visitor's satisfaction ratings on road and pedestrian signage were broadly similar – with most providing scores of 4 and over.

Table 42: Satisfaction rating on ease of finding one's way around - residence

Resident	Road signs	Pedestrian signs	Display maps and information boards
Base	320	320	320
Mean	4.3	4.3	4.3
Very poor	0%	2%	2%
Poor	6%	3%	5%
Average	13%	14%	12%
Good	23%	26%	25%
Very good	59%	56%	57%

Table 43: Satisfaction rating on ease of finding one's way around - visitors

Visitor	Road signs	Pedestrian signs	Display maps and information boards
Base	389	389	389
Mean	4.5	4.5	4.4
Very poor	1%	1%	1%
Poor	2%	1%	2%
Average	7%	9%	9%
Good	28%	28%	30%
Very good	62%	61%	58%

Public toilets

5.5.7 Among residents 62% rated the cleanliness of the public toilets as 'Good' or 'Very good' compared with 53% who said the same for the availability.

5.5.8 Three quarters of visitors rated the cleanliness of the public toilets as 'Good' or 'Very good' and 65% rated the availability of public toilets in the city as 'Good' or 'Very good'.

Table 44: Satisfaction rating on public toilets - residents

Resident	Availability	Cleanliness
Base	316	316
Mean	3.6	3.8
Very poor	7%	5%
Poor	13%	10%
Average	27%	23%
Good	24%	30%
Very good	29%	32%

Table 45: Satisfaction rating on public toilets - visitors

Visitor	Availability	Cleanliness
Base	302	302
Mean	3.8	4.1
Very poor	5%	2%
Poor	11%	5%
Average	18%	16%
Good	29%	34%
Very good	36%	43%

Cleanliness of streets

5.5.9 Satisfaction with cleanliness of the streets and upkeep of parks and open spaces was found to be high among both residents and visitors; 88% of residents and 84% of visitors rated the cleanliness of the streets as 'Good' or 'Very good' and 96% of residents and 98% of visitors rated the upkeep of parks and open spaces as 'Good' or 'Very good'.

Table 46: Satisfaction rating on cleanliness of streets - residents

Resident	Cleanliness of streets	Upkeep of parks and open spaces
Base	397	397
Mean	4.4	4.7
Very poor	1%	0%
Poor	1%	0%
Average	9%	3%
Good	37%	24%
Very good	51%	72%

Table 47: Satisfaction rating on cleanliness of streets - visitors

Visitor	Cleanliness of streets	Upkeep of parks and open spaces
Base	476	476
Mean	4.5	4.7
Very poor	1%	0%
Poor	1%	1%
Average	5%	1%
Good	38%	29%
Very good	55%	69%

Nightlife/evening entertainment

5.5.10 Whilst a significant number of residents and visitors had no experience of evening entertainment/nightlife in the city, among those who did, satisfaction was generally lower than many of the other aspects of performance rated.

5.5.11 A significant proportion of residents and visitors provided poor or average scores. Residents in general provided lower scores than visitors. For example, 35% of residents rated the range of evening entertainment as 'Poor; or 'Very poor', compared to 14% of visitors. That said, a significant proportion of both residents and visitors thought the range, quality of service and value for money for nightlife in the city were either 'Good' or 'Very good'.

Table 48: Satisfaction rating on evening entertainment - residents

Resident	Range	Quality of service	Value for money
Base	237	237	237
Mean	3.1	3.7	3.5
Very poor	12%	4%	5%
Poor	23%	7%	13%
Average	25%	27%	28%
Good	25%	40%	38%
Very good	15%	21%	17%

Table 49: Satisfaction rating on evening entertainment - visitors

Visitor	Range	Quality of service	Value for money
Base	164	164	164
Mean	3.7	4.1	3.9
Very poor	4%	2%	1%
Poor	10%	3%	7%
Average	23%	11%	23%
Good	38%	49%	39%
Very good	26%	35%	30%

Overall impression of the City

5.5.12 Satisfaction with the general atmosphere of the city was high among both residents and visitors; 92% of residents and 96% of visitors rated this aspect as either 'Good' or 'Very good'.

5.5.13 Satisfaction on feeling of welcome was also high; 88% of residents and 93% of visitors rated this aspect as either 'Good' or 'Very good'.

Table 50: Satisfaction rating on overall impression and welcome- residents

Resident	General atmosphere	Feeling of welcome
Base	403	403
Mean	4.5	4.4
Very poor	0%	1%
Poor	1%	2%
Average	7%	9%
Good	35%	36%
Very good	57%	52%

Table 51: Satisfaction rating on overall impression and welcome- - visitors

Visitor	General atmosphere	Feeling of welcome
Base	486	486
Mean	4.6	4.6
Very poor	0%	0%
Poor	1%	1%
Average	4%	5%
Good	30%	28%

Very good	66%	65%

Overall trip enjoyment

Just over a quarter of residents and a fifth of visitors rated their overall trip enjoyment as ‘Average’. For others, the trip was enjoyable; 72% of residents and 80% of visitors rated overall enjoyment as either ‘High’ or ‘Very high’.

Table 52: Overall trip enjoyment

	Resident	Visitor
Base	403	486
Mean	4.0	4.1
Very low	0%	0%
Low	1%	0%
Average	28%	19%
High	45%	50%
Very high	27%	30%

72% of residents report that overall enjoyment was high or very high

80% of visitors report that overall enjoyment was high or very high

6 Key findings and recommendations

6.1 Introduction

6.1.1 The findings of this research portray a positive picture of tourism in the Chichester District but have identified some specific areas for improvement in order to increase the volume and value of tourism. These are highlighted in blue in this section.

6.2 Value of tourism in the local economy

6.2.1 There are 455 businesses in the Chichester District directly involved in tourism. These are either accommodation providers (401 in total) or attractions/ places to visit/ activity providers (54 in total). Tourism-based businesses therefore represent 7.2% of all businesses in the Chichester District. Together these businesses generated an estimated revenue of £414.4 million in 2015 and supported an estimated 5810 FTE jobs. Taking into account the part-time and/or seasonal nature of many jobs within this industry sector, this rises to 8037 total jobs.

6.2.2 Tourism businesses and accommodation are spread across the District due to the presence of some major attractions away from the city of Chichester, notably Goodwood, Marwell Zoo, National Trust properties, Fishbourne Roman Villa and Arundel Castle plus the attraction of the coastline – together these help to distribute the industry and employment across the District.

6.2.3 Inevitably, there is a concentration in the city of Chichester: 77 accommodation businesses and 17 visitor attractions are located in the City/PO19 area. The four main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium. These four attractions account for 212.4 FTE jobs and generate £15.7 million annually for businesses across the City, District and the wider region. Whilst these are significant sums brought into the area by these four attractions, these represent only 3.7% and 3.8% respectively of the total jobs and revenue.

6.3 Bedspace available

6.3.1 Bedspace capacity is potentially one of the key constraining factors on the District's ability to increase revenue from tourism. The 401 accommodation businesses provide almost 19000 bedspaces but 75% of this is in caravan/camping and chalet sites making this primarily a seasonal provision. In addition, this is concentrated in the PO20 area.

6.3.2 A further 1262 self-catering bedspaces (7% of the total) are available through holiday lets and self-catering apartments.

6.3.3 Serviced accommodation accounts for 16% of the total accommodation available which equates to 3060 bedspaces. 53% of serviced bedspace is located within the city/PO19 area.

Recommended action: A seasonal occupancy survey is recommended to identify if this constrains the tourism market at certain times of the year. A web visitor survey is recommended to determine whether overnight visitors found the type of accommodation they required.

6.4 Volume and value of tourism in Chichester District

6.4.1 An estimated 6.3 million visits were made to this area in 2015 comprising:

- 5.7 million day visits with visitor expenditure estimated at £189.2 million
- 477.7 thousand domestic overnight visits with visitor expenditure estimated at £76.1 million
- 123.4 thousand overseas overnight visits with visitor expenditure estimated at £56.2 million.

6.4.2 This puts Chichester on a par with Canterbury in terms of visit profile and volume.

6.4.3 Looking at average spend per trip, this shows that Chichester outperforms Canterbury by approximately 8%. In addition, compared to the South East region, Chichester surpasses the Regional average spend in all trip types, as detailed overleaf (Table 53).

Comparison of Average Visitor Spend in Chichester vs. South East Region

	Chichester District Visitors	All South East Region Visitors	Comparison Chichester District vs. South East
Domestic overnight visitors	£170.05	£150.82	+12.7%
Overseas overnight visitors	£455.20	£436.10	+4.4%
Day visitors	£33.45	£31.00	+7.9%
Total visitors	£51.62	£48.32	+6.8%

6.5 Profile of visitors to the city of Chichester

6.5.1 Visitors to Chichester are primarily from Sussex and Hampshire – together these accounted for three quarters of all visitors in the recent survey. Only 5% came from Surrey. Noteworthy is the very low proportion originating in London – 3%: this represents a real opportunity to increase visits from this densely populated area.

6.5.2 Visitors from overseas residents were scarce – estimated at 5% in 2015 and much smaller than other UK cities such as Bath (28%) York (15%).

Recommended action: A campaign to increase the number of overseas visitors is recommended especially as these are higher value visitors due to their above average spend per visit (see table 53 above).

Visitors from overseas may need more assistance than domestic visitors when planning a visit. To attract their attention, collaboration with a well-known attraction is recommended to promote the area. Goodwood events and Portsmouth Historic Docks/Marie Rose Museum are well known attractions with the potential to attract attention on the international stage. Suggested itineraries are recommended for inclusion on the Visit Chichester website to demonstrate ease of visiting, proximity to London and ease of travelling around. For example, single day and two day itineraries to include Chichester Cathedral and city centre together with one or two leading attractions are recommended. This would be in addition to the current itinerary planning function on the website.

6.5.3 Visitors tended to be older with almost 60% aged 55+ but only a third were retired; 65% were ABC1. A third visited alone with another third visiting with their spouse and 20% with their family. The average group size was 1.9. Primary reasons for visiting were for a leisure day out (33%) and for a special shopping trip (27%). 17% visited a tourist attraction in the city and 8% came for an event. 5% visited for a holiday or short break. The average day trip length was 3.4 hours and overnight trip was 3.9 nights.

6.5.4 Residents visiting the city are younger than visitors with less than a quarter retired. 44% are aged 25 – 54 and only 38% are 55+. Residents are slightly more up market: 70% are ABC1. Two thirds visit the city alone. The main reasons to visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

6.5.5 Amongst visitors, frequency of visiting was high with 29% visiting weekly and another 29% visiting 5 + times a year. In addition, it is very positive to note the incidence of first time visitors at 20%. It is important to attract a balance of regulars and to supplement these with a pool of new visitors.

6.5.6 As may be expected, local residents are frequent visitors to the city centre: three quarters visit every day.

Recommended action: Data capture is to be encouraged by local businesses to maximise opportunities to communicate with visitors at a later date and to sell on line. Businesses could provide off peak/out of season offers to encourage new visitors to return.

6.6 Tourism business performance

6.6.1 Feedback from tourism businesses on trading levels from January to end of July 2016 compared to the same period last year, showed a fairly even divide between those experiencing an improvement, those reporting a decline and those who experienced no significant change. However, there were different responses from various sectors: within retail and serviced accommodation, more businesses reported a decline in trading whilst the most positive outcomes were reported by restaurants.

6.6.2 Looking ahead to the coming year, more businesses were positive than negative (33% vs. 20%) and again it was the restaurants who were the most positive. Positivity was driven as much by expectations of improvements to the weather as any other individual influence. But weather aside, positivity was said to be due to investment in the business plus attractions and events increasing visitor numbers.

6.6.3 When asked about factors affecting business performance, the cost of parking in the city was frequently cited and was also raised when asked about changes which would improve the performance of their business and the local economy. In addition, problems with traffic management and congestion (generally on the A27 and specifically due to roadworks) were raised as issues.

6.6.4 Other issues mentioned were the need to promote the destination more and to develop the night time economy.

6.7 Image amongst businesses (business survey)

6.7.1 There is a positive view of the city amongst businesses with many citing the heritage and historical architecture of the city as the best thing about the city. It is felt to be an attractive centre with a good ambience, a good range of shops and easy to get around.

6.7.2 On the negative side the image of the city is affected by heavy traffic congestion which many businesses felt deterred visitors from coming to the city. Once again the perceived high cost of parking and a view that the city lacked adequate parking provision was raised.

6.7.3 When asked about the vibrancy of the city, Chichester was not rated highly rated, achieving an average of 3.3 out of 5. This highlights an area for development, especially if Chichester is to compete for day trip and short break business originating from London and abroad.

Recommendation: ensure all businesses are represented by a photo on the Visit Chichester site to communicate visually the breadth of businesses available.

6.8 Image amongst visitors

6.8.1 Research was conducted amongst visitors and amongst residents of the area visiting the city.

6.8.2 Amongst visitors, the Cathedral is well known. Other associations are with the shopping, the Festival Theatre, and Goodwood. The heritage of the city and its historical buildings, plus its parks and open spaces are also associated with the city. These are frequently cited as the best things about the city along with the ambience of the city. The general atmosphere and feeling of welcome in the city were rated highly (both at 4.6 out of 5) by visitors.

6.8.3 The overall opinion of the city of Chichester was good with almost zero criticism. The average rating for overall enjoyment was 4.1 out of 5 amongst visitors and 4.0 amongst residents. Whilst a positive outcome, there is definite scope to improve the overall enjoyment levels. To offer some context as to what might be achievable, in 2014 the city of Bath received a rating of 4.63 out of 5 from visitors.

6.8.4 When asked about the worst things in the city, it is reassuring to note that over 40% did not respond. In line with the business survey, factors which were raised were car parking costs, traffic and also a decline in independent shops. The score attributed for the vibrancy of the city, in line with the view of businesses, was much lower than the overall enjoyment at 3.3 amongst visitors and 3.0 amongst residents reinforcing the need to address this.

Recommended action: Review the factors contributing to the atmosphere and vibrancy of the city in competing cities – Canterbury, Exeter and Bath are suggested - to identify elements which could be introduced in Chichester. Review the portrayal of the city on the Visit Chichester website, taking into account the short dwell times per page:

- *Shopping: the shopping pages feature little photography and do not communicate the range of shopping available. Ensure every shop displays a photo and use the web banner on this page to display a rolling series of atmospheric street and shopping photography.*

- *Identify strengths in the independent shopping offer - for example antiques or food specialists - and communicate these visually on the Visit Chichester website. Develop a themed shopping trail to communicate the range of independent shops. This might take in specialist farm shops outside of the city.*

- *Publicise a guided walk of the city to link key attractions plus recommendations for refreshments and dining.*

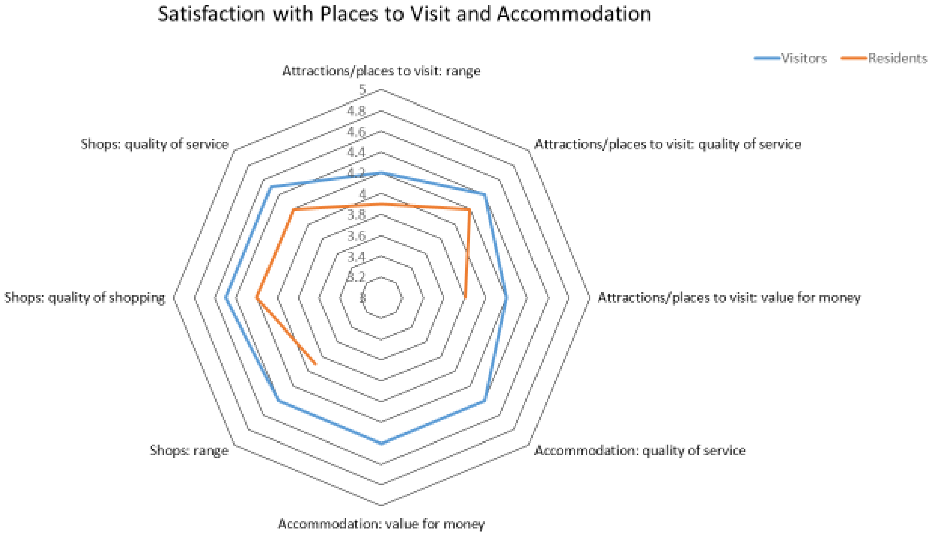
- *Make full use of photography on the navigational panels (City/Country/Coast coloured panel). Many pages feature this panel plus a map but little photography until the viewer scrolls down the page. Consequently, potential visitors may not see the motivational shots when browsing superficially.*

6.9 Visitor Satisfaction

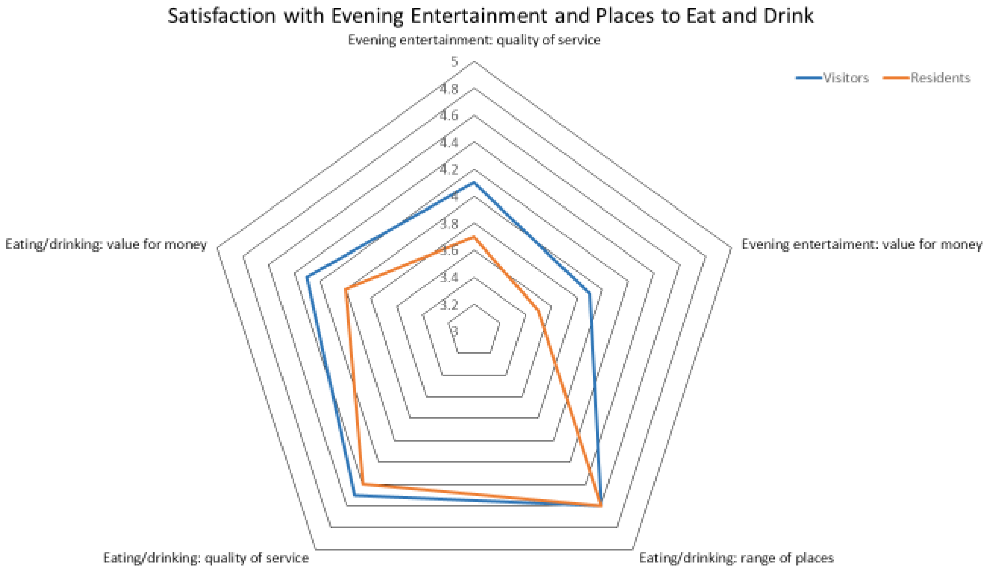
6.9.1 Analysis of satisfaction with the individual elements of the city is shown on the following spider diagrams. This identifies two main areas which have impacted on the overall satisfaction scores are the cost of parking and availability of public toilet facilities. Criticism of the cost of parking was raised as an issue in the business research. (It is worth noting that other dimensions exploring value for money have not attracted the same level of criticism as parking in the city.) Given the prevalence of the car as a mode of travel to Chichester, perceived cost of parking is an important issue.

Recommended action: There is multiple evidence that cost of car parking is an issue – real or not, it is a perception which would be advisable to address. Examine ways to allow businesses to be involved in this; for example – accommodation providers could offer a car parking voucher to give discount on parking or to offer the first two hours free; retailers could refund parking when customers spend over an agreed amount; parking charges could stop one hour earlier in the day to encourage early evening dining at the end of a day shopping. This would extend trip length and increase spend.

6.10 Places to visit – shops and attractions - and accommodation available all surpass the overall satisfaction scores amongst visitors and perform well in terms of quality and value.



6.11 Satisfaction ratings confirm visitors are happy with the range, quality and value of places to eat and drink but reveal less satisfaction with the service and value of evening entertainment choices.



6.12 The Evening economy

6.12.1 There is a thriving evening economy with two thirds of residents and 43% of visitors from outside the city visiting for leisure purposes in the evening, primarily to dine in a restaurant, pub or wine bar.

6.12.2 The theatre and cinema also attract residents and visitors into the city with the theatre being particularly successful at attracting visitors.

6.12.3 However, the satisfaction ratings given above suggest there is scope to improve the quality of service and value of evening entertainment.

Recommendation: include an evening events section on the Visit Chichester website and use to encourage visitors to stay into the evening. A date ordered events calendar would make browsing for activities simpler. Out of date activities need to be removed from the calendar. Calendarise the current What's On section making this easier to navigate by date.

Appendices

Table 53: UK counties of residence among domestic visitors

	486
Sussex	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%
Hertfordshire	1%
Dorset	1%
Essex	1%
Leicestershire	1%
Wiltshire	1%
Cheshire	0.4%
East Yorkshire	0.4%
Glamorgan	0.4%
Isle of Wight	0.4%
Lincolnshire	0.4%
Middlesex	0.4%
Bedfordshire	0.2%
Ceredigion	0.2%
County Armagh	0.2%
Cumberland	0.2%
Derbyshire	0.2%
Gloucestershire	0.2%
Kinross-Shire	0.2%
Norfolk	0.2%
Northamptonshire	0.2%
Northumberland	0.2%
Oxfordshire	0.2%
Ross-shire	0.2%
Somerset	0.2%
Suffolk	0.2%
Swansea	0.2%
West Yorkshire	0.2%
Grand Total	100.0%

Table 54: UK town/city of residence among domestic visitors

Chichester District – outside City (mainly PO18 and PO20)	19%
Bognor Regis	14%
Waterlooville	4%
Havant	3%
Emsworth	3%
Littlehampton	3%
London	3%
Portsmouth	3%
Worthing	3%
Midhurst	2%
Petersfield	2%
Southampton	2%
Fareham	2%
Southsea	2%
Pulborough	2%
Arundel	1%
Crawley	1%
Hayling Island	1%
Petworth	1%
Eastleigh	1%
Guildford	1%
Brighton	1%
Haslemere	1%
Hove	1%
Maidenhead	1%
Walsall	1%
Woking	1%
Aldershot	0.4%
Alton	0.4%
Burgess Hill	0.4%
Farnham	0.4%
Godalming	0.4%
Gosport	0.4%
High Wycombe	0.4%
Horsham	0.4%
Lee-on-the-solent	0.4%
Leicester	0.4%
Liss	0.4%
Shoreham-by-Sea	0.4%
Ashford	0.2%
Aylesbury	0.2%
Barnet	0.2%
Bath	0.2%
Beckenham	0.2%
Billingshurst	0.2%
Bracknell	0.2%

Bristol	0.2%
Broadstairs	0.2%
Bury	0.2%
Camberley	0.2%
Canterbury	0.2%
Cardiff	0.2%
Cardigan	0.2%
Chelmsford	0.2%
Chesham	0.2%
Coalville	0.2%
Craigavon	0.2%
Croydon	0.2%
Dingwall	0.2%
Enfield	0.2%
Epping	0.2%
Epsom	0.2%
Exmouth	0.2%
Farnborough	0.2%
Felixstowe	0.2%
Ferndown	0.2%
Gillingham	0.2%
Glossop	0.2%
Gravesend	0.2%
Haywards Heath	0.2%
Hexham	0.2%
Hindhead	0.2%
Holmfirth	0.2%
Honiton	0.2%
Hull	0.2%
Iver	0.2%
Kinross	0.2%
Lancing	0.2%
Liverpool	0.2%
Macclesfield	0.2%
Maesteg	0.2%
Manchester	0.2%
Melksham	0.2%
Millom	0.2%
Mitcham	0.2%
New Milton	0.2%
Newhaven	0.2%
North Ferriby	0.2%
Northampton	0.2%
Oldham	0.2%
Oxford	0.2%
Paignton	0.2%
Peacehaven	0.2%

Plymouth	0.2%
Polegate	0.2%
Radlett	0.2%
Reading	0.2%
Richmond	0.2%
Romsey	0.2%
Royal Tunbridge Wells	0.2%
Ryde	0.2%
Saint Albans	0.2%
Sale	0.2%
Salisbury	0.2%
Seaview	0.2%
Shefford	0.2%
Sleaford	0.2%
Spalding	0.2%
Steyning	0.2%
Stoke-on-trent	0.2%
Swansea	0.2%
Swindon	0.2%
Tadley	0.2%
Thetford	0.2%
Thornton Heath	0.2%
Watford	0.2%
West Malling	0.2%
West Molesey	0.2%
Wickford	0.2%
Wigan	0.2%
Wolverhampton	0.2%

Table 55: Overseas visitor country of residence

Base	20
Australia	40%
U.S.A.	20%
Germany	15%
Canada	5%
Rep. of Ireland	5%
Italy	5%
Netherlands	5%
New Zealand	5%

Table 56: Best things about the city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Compactness/easy to get to one end to another	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Quietness	7%
Parks and gardens	7%
Cleanliness of the city	6%
Quaintness of the city	6%
Safety/feel safe from crime in the city	4%
Theatre	4%
Nice place to live	3%
Easy to get to the city	3%
Markets	2%
Plenty of parking	2%
Places to walk	2%
University	1%
Street entertainment	1%
Cinema	1%
Good public transport	1%
Close to sea	1%
Unspoilt/scenery/nature	1%
Lake/river/canal	1%
Novium	<1%
Good cycle lanes	<1%
Sports centre/Gym	<1%
Good rail link	<1%
Flowers	<1%
No beggars	<1%
Plenty of toilets	<1%
Peregrines	<1%
Beach	<1%
Butlins	<1%
Mini golf/putting	<1%
Fresh air	<1%
Child/family friendly	<1%
Seating	<1%

Table 57: Worst things about the city

Parking availability and costs	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27	5%
Not much to do	4%
Not enough for children/young people	3%
Lack of good pubs and restaurants	3%
Not enough public toilets	3%
Shops, cafes and pubs shut too early	3%
Not enough big name shops	3%
Lack of evening public transport	3%
Snobby/rude people	3%
Beggars/vagrants	2%
Youths hanging around	2%
Lack of signage	2%
Too many chain shops	2%
Litter	2%
Street markets	1%
Close streets to buses	1%
Train gates	1%
Too mnay modern buildings	1%
Old fashioned/dated/shabby	1%
No shade/shelter/seating	1%
Cyclists not using cycle paths/speeding	1%
Not enough bike racks	<1%
Unisex toilets	<1%
Lack of police presence	<1%
Flower boxes/parks need tidying	<1%
Sunday opening	<1%
No places for coaches to stop	<1%
Lack of cycle paths	<1%
Elderly population	<1%
Too touristy	<1%
No sports complex	<1%
Too many charity shops	<1%
Weather	<1%
Marina	<1%
Birds/mess	<1%
Noisy at night	<1%
Not wheelchair friendly	<1%

Accredited by:

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Retail Trends Summary Report

Prepared for Chichester City Council by The Retail Group, August 2016

1 Introduction

This trends summary has been compiled for Chichester City Council to provide an overview of the current dominant trends affecting the retail sector and town / city centres in order to help inform their future Vision & Strategy for Chichester City Centre.

An extensive and bespoke review of published research, reports, articles and insight from industry leaders has been undertaken; a full list of research sources is contained in the Bibliography.

This broad research approach has enabled us to collate the views of a wide audience from industry leading bodies such as the ATCM, BCSC and Institute of Place Management; to research and insight specialists including Deloitte and Dunnhumby; to retail property and planning specialists including; Savills, GVA, Carter Jonas, Colliers and GL Hearn; along with government bodies, shopping centre managers / owners and other industry specialists. The research also includes the first hand findings of surveys undertaken by The Retail Group of consumers and retailers / operators in town and city centres across the country.

The trends research and information compiled has been collated under a number of headings;

- Consumer Trends
- Retailer Trends
- Town Centre Context
- Retail Outlook
- Future of Retail
- What could these trends mean for Chichester?

Each section opens with a summary (blue box) providing interpretation and an overview of the important trends and patterns identified under each of the headings.

The supporting background and evidence that has been collated and reviewed as the methodology to underpin the interpretation and summaries is also included. These are shown as extracts from the various published reports and articles. In a number of instances we have provided a typical report extract that is representative of a number of similar reports produced by a variety of retail industry planning specialists.

The content of the summaries and the supporting research extracts will, we believe, help to provide useful building blocks for developing the Chichester City Centre Vision and Strategy.

Note: This report has been prepared shortly after the country has voted to leave the EU. Whilst the majority of trends identified in this report won't be affected and remain still very relevant, some of the economic outlook data and forecasts referred to may change over the next few years as the economy rebalances to a different trading environment, and rebuilds.

2 Consumer Trends

Consumer behaviour continues to change and in the wake of technological advancements it is changing at a rapid pace.

Consumers are demanding ever increasing 'convenience', shopping needs to be an 'easy' experience and "when it suits me". With the advent of the 'connected consumer', consumers want and expect to be able to buy anytime and anywhere.

Home delivery has brought its own issues, in that the recipient needs to be at home to receive the delivery often at a committed time slot, this is contra to the trends in ease and convenience and evidenced also in part by the growth of click and collect.

Discounters like Aldi and Lidl have reminded us of the benefits of 'shopping around' and not just for convenience goods, but in a general search for 'value'. Big food stores have also, in some respects, become 'too big to shop' and therefore take up too much time, with smaller local stores becoming quicker and more 'convenient'. Food shopping has fragmented into big shopping trips and 'top up'; will non-food shopping (comparison) follow this pattern?

Despite the ability of online to satisfy retail requirements quickly; consumers are increasingly looking for meaningful 'experiences' and personalisation; human interaction also remains an important factor.

The boundaries between shopping and leisure are becoming ever more blurred, with opportunities to combine leisure, eating and drinking and to 'make a day of it' adding to the appeal of destinations.

The ageing population is well documented and this along with the importance of 'value' are two factors that will continue to influence retail and the role of town / city centres in the future. 'Value' is relative and should not be confused with 'cheap' and poor quality. One of the leading and most 'desired' retail brands is 'never knowingly undersold'.

Consumers, even though overloaded with technology, are still visiting shops.

Understanding your customer base; anticipating what customers want and providing it to them will need to be at the heart of any retail, town or city centre proposition.

Ease of shopping extends to facilities in town centres, including ease of access, information provision, car parking and adjacencies / connectivity.

Customers are increasingly able to choose to go to a location, for many other reasons than the list of retail names present and the size of the stores they trade from.

2 Consumer Trends: Supporting Evidence

An Ever-Growing Demand for Convenience

Source: Industry Property and Planning Specialists

Traditional pattern of convenience shopping is changing, with a move away from undertaking a weekly main food shop and then topping up sporadically. Instead people are starting to undertake a greater number of smaller yet more frequent trips to a variety of locations.

- Constrained expenditure has driven shopping around at a number of different destinations.
- Using big food stores for basics plus specialists for items such as meat and fish.
- Internet shopping / delivery services mean a growing proportion secure their basics this way and then top up on fresh fruit, meat, fish, etc. as and when needed at a variety of locations.
- These shopping habits are reinforced by community focused initiatives and street markets.

Source: TRB Future of Retail Bulletin (packaging article)

Statistics show that reliance on the traditional weekly 'big shop' is diminishing and shoppers are instead making regular, sometimes daily, visits to smaller convenience stores to meet the demands of increasingly busy modern lifestyles.

- It is estimated that as consumers continue to be time-poor, changes in the way they choose to shop will see convenience stores grow by 22% to £20.2bn by 2020. Similarly 'meal for tonight' purchases will increase by 50% to £2.7bn and purchases of often warm 'food to go' is expected to rise by 60% to £8.3bn.
- Figures from CBRE show the four big grocery retailers now run almost 3,500 convenience stores or small stores such as; Tesco Express / Metro, Sainsbury's Local, 'M' Local and Little Waitrose. Arguably growth in convenience stores has had more impact than online as it has encouraged a change in shopping habits – it has encouraged people to fragment their shopping.

Internet and advances in mobile technology are increasingly affecting shopping behaviour

Source: Multifunctional Centres: a sustainable role for town and city centres, Institute of Place Management (2016)

- Expansion of internet shopping has been particularly influential in the development of a new wave of convenience culture.
- New convenience culture also reflects a time-poor, often on the move society, that is more conscious of the local economy and sustainability.
- Although statistics vary, depending on what is included, the UK is the market leader in the share of retail spend that has gone online, according to Centre for Retail Research.

2 Consumer Trends: Supporting Evidence contd.

Internet and advances in mobile technology are increasingly affecting shopping behaviour contd.

Source: The Omnichannel Opportunity, Deloitte (Feb 2014)

The Deloitte report talks about 'the connected consumer'. *"Connected consumers want to be able to buy, anytime, anywhere".* Omnichannel retailing responds to this trend by seeking to provide a flexible and seamless shopping experience. Awareness generated through websites, apps and online marketplaces is considered to create a positive effect across all sales channels, not just online.

- Around 95% of the non-stores sales are incremental to stores sales (for the retailers analysed).
- UK Women's dresses – retailers with a smaller store footprint and those with a higher share of non-store sales, captured a higher level of incremental value from non-store sales.

Source: The Retail Bulletin (TRB) May 2016

New research suggests that retailers are playing catch-up with how shoppers want to interact with them. Based on Savvy Marketing's poll of a 1,000 householders;

- 95% of adults that have access to the internet have shopped online at least once in the last 6 months.
- Despite the convenience of online, the research found that around half were more likely to shop impulsively instore than online.
- Only a fifth of UK shoppers said they believed that the high street / shopping centre closest to their home had improved in the past 2-4 years and 40% thought it had declined.
- 59% of shoppers said they did not visit traditional stores as much as they used to because of online shopping.
- 79% thought physical retailers needed to do more to attract shoppers to their stores.
- However 91% thought there will always be a place for physical stores and 85% said that online retailers can never recreate the experience of shopping in a store.
- Human interaction is important when shopping and there was a strong sense of nostalgia.
- 75% of shoppers think they will do the majority of their shopping online in 10 years' time. Over the same period, 60% also think the high street will not exist as we know it.

Alastair Lockhart, Insight Director at Savvy, quotes;

"There's no doubt about it, demographic shifts, improving technology and retail innovation will ensure the continuing growth of online retailing, but reassuringly, the high street and shopping centres will still have a role – albeit a different one – to play. The bottom line however, is that retailers can ill-afford to stand still and rely on a long standing customer base. Instead, they must evolve with the times and reinvent themselves."

2 Consumer Trends: Supporting Evidence contd.

Future proofing tomorrow's shopping experience;

Source: The Retail Bulletin (TRB) Future of Retail

3 emerging trends as defined by Sue Benson, Managing Director of The Market Creative in The Retail Bulletin's Future of Retail and what they mean for retailers and how they can help future proof the shopping experience;

1) ***Know me, Love me*** – particularly prevalent among Millennials. Reflects the high expectation that once shoppers have provided information about themselves, they expect to be known and recognised – to be loved. Reward these shoppers with tailored and personalised marketing, products and offers.

2) ***People as Collaborators*** – Demise of the retail worker; BRC figures forecast 900,000 job cuts by 2025 as a result of increasing costs from the rising National Minimum Wage, the Apprentice Levy, changes in buying behaviour and technological advancement. Retailers will need to think differently about the role of service staff, of which the shape will undoubtedly change. Less involved in the facilitation of transactions, instead becoming key collaborators with customers in a prime position at the front of the service chain. Experts in their field, centre of your community, curators of advice…differentiation giving shoppers a reason to engage.

3) ***Consumers in Charge*** – Turning this challenge into an opportunity. Brands that will win will focus on and cultivate shopper demand for convenience. Make it as simple, easy, enjoyable as possible to shop; wherever, whenever, however. "One button" shopping is gaining traction in the US and over the next 5 years the UK is expected to follow suit. Examples; Amazon's Dash Button and Push me Pizza App, along with tailoring products to personal preferences, e.g. Shoes of Prey (Custom Shoes), Mixmyown.com (mix own cereal), design roof of your own mini cooper. Includes 'sharing' on social media especially Millennials. The DigitasLBi Global Survey reported 35% of UK social media users have shared a purchase via their social network.

Customer Service is Key to a Brighter Future

Source: The Retail Bulletin Future of Retail

Where once a negative experience may have been shared with 5 people, an issue aired on Twitter or Facebook has the potential to reach high volumes of people in a very short time. The way customers interact with retailers is changing. The customer wants and expects dialogue with the brand on an ongoing basis. Anticipating what customers want and providing it to them – can be the differentiator that breeds loyalty, recommendations and repeat purchase.

While customer service has always been very important, it has become even more so.

2 Consumer Trends: Supporting Evidence contd.

Getting to Know Your Retail Tribes

Source: The Retail Bulletin Future of Retail

Discusses the need to identify the tribes that make up your customer base. Then, to create the ultimate retail environment for them, you will have to be able to understand their motivations, IT habits and general psychology.

Does everybody want stores to have the latest gadgets? - Iris recognition, smart changing rooms, near field comms and clothing that can read your moods?

UK as a whole is one of the most technophile places on the planet. Not only are the British early adopters, they are also largescale consumers, with an appetite for techno products. In a population of just 64 million there are 32m contactless cards in circulation, 83m mobile phones, 84% of Brits have internet access, 29% of adults own a tablet and 25% of that group use their tablet to shop. A staggering 60% use the internet to buy products, such as food, clothing, music or holidays and more than half of mobile owners use their phone to search for information while out shopping.

It's becoming even less about demographics but about being 'like-minded'. For example, key tribes identified by rpa:group (interior design and construction consultancy specialising in retail leisure and workplace projects);

a) Style conscious tribe
b) Value tribe
c) Urban chic tribe
d) The collaborators tribe
e) The iconoclasts tribe, etc.

Which technology is relevant or of interest to your customer tribes?

Seeking a Meaningful Experience

Source: The Retail Bulletin Future of Retail

"With the ever growing emotional and interpersonal isolation brought by the exponential growth of the technology, consumers are increasingly longing for meaningful experiences and relationships."

A Bluewater example – 'delivering enjoyment'. Described as more Disneyesque than traditional shopping centre. Includes treating visitors as guests along with a series of statement stores. They regularly measure and monitor effectiveness of what they're doing almost in real time. So far have collected insight from more than 12,000 people.

Enjoyment is becoming a valuable driver of Bluewater's commercial success.

Research has highlighted the importance of Bluewater's hosts and concierge staff in driving sales. Guests who interact with a member of the Bluewater team for example, are 39% more likely to spend more than £200 than those who do not.

Experience-led initiatives through commercial partnerships (Lindt chocolate example).

Bluewater set CACIs industry benchmarks for consumer retail spend, catering spend and dwell for the 4th year running.

2 Consumer Trends: Supporting Evidence contd.

Ageing Population

Source: Multifunctional Centres: a sustainable role for town and city centres, Institute of Place Management (2016)

Increase in the population of older people is well documented. People are becoming healthier and more active; proportion of 65+ will rise from 17.7% to 23.5% in 2034. This group 'silver surfers' are also becoming more techno-savvy. We live in an ageing society, with the median age of the population expected to rise from 39.7 in 2010 to 42.2 years by 2035.

- In 5 years' time there will be half a million fewer teenagers and young adults.
- In 10 years' time there will be 3 million more people aged 70 and above.
- The proportion of middle aged people will fall.
- In some areas, over half the residents will be 60 or over.
- By 2017 people over 60s will make up close to 24% of the population.

South East is expected to experience strong population growth over the next decade. The South East is expected to see 0.9% p.a. growth in the working-age population between 2010-2020, and overall growth will be above the UK average – ranking it 6th out of the 12. Growth will be greatest in the 50+ population, particularly within the oldest groups. The 65+ group will increase strongly.

Millennials versus Grey Shoppers: Bridging the retail generation gap.

Source: The Retail Bulletin (TRB) Issue 1 - Future of Retail, May 2016

- Millennials = youth age group, "fickle young target audience of "digital natives". They drive fashion – young, energetic, digital and therefore measurable and trackable.
- A few years ago it was all about the power of the grey pound and the ageing population. These audiences haven't gone away, it's just the retail landscape by and large is seduced by the cult of the young.
- In the UK there are over 22m over 55s = over a third of the UK population (36%). Over 50s accounting for 47% of the UK's consumer spending, according to research, equating to £320bn per year (source: Centre for Economic and Business Research and Saga).
- The Millennial audience is the largest demographic in history – a larger audience than baby-boomers at 92m individuals (source: Goldman Sachs).
- British Banking Association has found that 'Silver Surfers' are fuelling mobile and digital banking growth.

The audience (older consumers) is there, they are discerning, they have money to spend and often evolving multichannel offerings are not giving them the shopping experience they want.

Personalisation

Source: The Retail Bulletin (TRB) Issue 1 - Future of Retail, May 2016

Given many retailers stated focus on personalisation it seems clear that offering this group a curated experience based on their individual needs and preferences is likely to pay dividends. Importance of the supply chain within the business world is set to grow. Amazon's trialling of one-hour deliveries and drones and its expansion into fresh, chilled and frozen food raises the bar for all retailers. Once customers get used to expecting to have their order delivered in full in 60 minutes they then become increasingly reluctant to settle for anything less from other suppliers.

2 Consumer Trends: Supporting Evidence contd.

Emerging Consumer Trends

Source: Town Centre Futures: An ATCM Thought Leadership Paper Prepared with Experian Marketing Services

The ATCM report identifies five consumer types;

1 Getting Older

"Focus on good service and leisure, in nice, safe, local places"

2 Expect Choice

"Want to be able to shop and live on own terms. Businesses must meet 'our' needs – anywhere and anytime"

3 Use Technology

"Technology is a part of life, use it for information, shopping, socialising, and deal hunting"

4 Driven by Value

"New outlook, less credit, high costs, depressed income"

5 Want Experiences

"Leisure is important. Want places that offer unique retail, cultural, social experiences"

2 Consumer Trends: Supporting Evidence contd.

Key Pillars of Long-term Customer Loyalty

Source: Dunnhumby Customer Centricity Index (CCI) March, 2016

Extensive research identifies 7 key pillars of long-term customer loyalty for offline and online retailers.

Cites a customer-centric approach as being essential to success.

7 Key Pillars for Offline – each represent an aspect of the customer journey. There are lessons here for the city / town centre as a whole and its retailers.

1 Affinity

Creating an emotional connection with customers. Trust in the brand see themselves reflected in the values communicated by the brand.

2 Range and Layout

Offering quality products and presenting them in an appealing way.

3 Relationship

Knowing and engaging your customers. Personalising comms and encouraging feedback.

4 Price

Creating a suitable customer value proposition.

5 Promotions

Offering relevant promotions, easy to understand, on good products and a genuine financial incentive.

6 Communications

Talking to customers in a relevant and personal way.

7 Rewards

Rewarding customer loyalty.

The main levers for good customer brand perception are; Affinity and Range and Layout.

3 Retailer Trends

There is a dichotomy emerging in terms of retailers' requirements going forward. While it seems likely that retailers will pursue smaller and / or more efficient store portfolios there is also a requirement for bigger and better stores in the larger towns / cities and shopping locations.

Successful quality brands do continue to expand, e.g. JLP / Waitrose, Next, Zara and H&M.

There are also new players on the scene as even pure play (on-line only) operators are seeing the benefit and potential to their brand of physical stores.

Retailers are increasingly exploring diversity in both store formats and retail channels as well as new product categories and 'mix' of categories. Large format store brands are opening smaller stores and small shop brands are increasing their store sizes.

Other different types of operator are also opening stores in town / city centres from farm shops to Dyson!

What is the new multichannel? - It's an emerging mix of all formats; town centre, online, mobile, home delivery, click and collect and out of town. The most successful retailers offer the full set. In some instances different product categories being better suited to different channels.

Retail needs are essentially falling into two groups; 1) value, basics and essentials and 2) quality, desirable and discretionary.

The final part of delivery to customer still remains to be solved, with challenges around practicality and costs.

While value operators are perceived to continue to drive expansion, aspirational retail brands are also demonstrating growth potential.

People and the service experience are key to the success of bricks and mortar stores.

'Retailers' as a group now include many other types of offer, such as F&B which has seen considerable growth, with F&B now an integral part of any retail offer. Service providers, particularly beauty and personal grooming are also expanding in town and city centres.

F&B and leisure are, and will continue to play, a very important role in the appeal of town / city centres, enhancing the visit experience 'beyond retail'. This leisure role also provides another aspect of the 'multi-functional town centre' and thereby an additional reason to visit, while extending dwell time and encouraging social interaction.

Retailers, it is clear, can ill afford to stand still; and so therefore neither can town / city centres. There are lessons for town centres from the big regional malls in terms of the evolving emphasis on high service levels and quality shopping experience along with effective stakeholder collaboration, working as a whole for the benefit of all.

3 Retailer Trends: Supporting Evidence

Overview of retailer trends and sources;

Source: AlixPartners Growth Retailer Report 2016 in partnership with Retail Week

- Black Friday and associated discounting behaviours are here to stay; the consumer discounting psyche is ongoing.
- Multichannel developments have underpinned the growth of many retailers.
- The increasingly multichannel world means that retailers can get by with smaller store networks.

Source: Industry Property and Planning Specialists

- Pace of expansion has slowed for convenience sector, with major food stores easing their drive for large format stores. Small convenience stores have proliferated.
- As usual low rents and the wide availability of car parking are fuelling the attractiveness of out-of-centre locations for operators such as; Next at Home, John Lewis at Home, etc.

Source: Multifunctional Centres: a sustainable role for town and city centres, Institute of Place Management (2016)

- Across Europe online retailers are expanding 14 times faster than traditional outlets. UK is said to have an oversupply of retail floorspace.
- Retailers want fewer stores in total but bigger and better shops in the larger towns and cities.

Source: Retail Myths Exploded (2015) Savills

- Retailers are becoming more aware of the role physical stores can play showcasing product and the brand, even though transaction may take place on line
  - Multi-channel stores report better sales than pure play; 21% year on year as of June 2015 as opposed to 13%.
- Growth in click and collect. This segment of the online retail market has been the fastest growing. Accounting for an estimated 18% of total online sales last year. 4 x what it was in 2010.
- Online to offline – pure play retailers opening physical stores.
- 'Pure Play entering physical stores, others may explore smaller stores 'shop windows', e.g. Argos is trialling. For some locations it may mean store size requirements increase. Click and Collect could see retailers accommodating an ever growing volume of stock in store (likely to be confined to those key retail centres that are more likely to act as Click and Collect Hubs).
- Increasing number of retailers require further portfolio expansion in order to drive investment returns (report mentions; Pure Gym, Evans Cycles, Byron Burger and Poundworld – who are all under private equity ownership.)
- Expanding sectors include value but <u>not</u> just value
  - Mass convenience retailing including Greggs and Holland & Barrett
  - But outpaced by the growth reported for the 'Aspirational' retail sector (16.8% growth). Brands include; Cath Kidston, Hotel Chocolat, Lakeland, White Stuff, Hotter Shoes, Carluccio's, Cote.
  - Report states that it expects the 'Aspirational' retail sector will continue to expand.

3 Retailer Trends: Supporting Evidence contd.

"Value will continue to be the powerhouse of occupier expansion as consumers remain enamoured with value. Aspirational retailing will provide an added boost to occupational demand in key regional centres and market towns."

Getting Ahead of the Curve

Source: TRB Future of Retail

Death of the Vertical Retailer – not solely new stores but exploring other avenues with as little risk as possible – opening concessions or wholesale agreements. Traditional high street retailers are becoming B2B suppliers as they open up ever more channels stocking their products across the web.

- Amazon and eBay have nearly 800 million unique visitors per month between them- "who can say no to that many consumers!"

Most popular types of promotion

Source: TRB Future of Retail (news)

Reports research from American Express of 200 in-house marketing decision makers;

- Nearly a third of businesses surveyed did not use vouchers (paper or digital) in any of their promotions in 2015.
- Most popular were money off specific products and / or a percentage off or back.
- Buy one get one free favoured by only 9%.
- Retailers are hungry for more data to help them deliver the most relevant offers to their customers.

Leisure Trends including F&B

Source: Industry Property and Planning Specialists

- Average household expenditure grew substantially (1984 – 2005) more than doubling, it has since slowed with some sectors nearing saturation (Bingo halls and multiplexes for example).
- Eating and drinking out of home has proved the most resilient; having proven the most popular activity that people undertake on a regular basis. Eating out market has grown by 8% 2008-2013.
- Cinema going is the second most popular activity; more recently a current trend for smaller cinemas with fewer screens in town centre locations.
- Coffee culture continuing; coffee chain sector growing at a rate of 6% annually since 2012.

UKs Favourite Fast food Restaurants and Coffee Shops

Source: TRB Future of Retail (news)

Reports research conducted by Market Force Information which polled more than 4,565 UK consumers;

- No.1 Five Guys (taking spot from Nando's).
- Cafes No.1 Pret (2nd year running) and No.2 Caffe Nero.
- Article also notes that the research identified that 1 in 8 revealed dissatisfaction with their experience in a café.

3 Retailer Trends: Supporting Evidence contd.

F&B being categorised in the same way as other categories as sector grows

Source: Coverpoint

"Coverpoint categorise foodservice units into 5 specific types. Each category encompasses a range of different units, but includes those with similar characteristics, similar in appeal, focus and menu provision. The key categories in any Town Centre environment are:"

1) Refuel and Relax

Refuel & Relax is not about main meal eating, the focus for both the user and unit is on having a drink, perhaps a snack and a short break in a pleasant environment before continuing the focus of their day.

Branded operators in this category include Caffe Nero, BB's Coffee & Muffins and Costa.

2) Speed Eating

Speed Eating encompasses any food that can be purchased and consumed quickly, which can mean freshly prepared salads, homemade soups and made to order bread based products. The key demand from users of Speed Eating is speed of service, as users are time poor. There should be minimal time delay in serving the guest, preparation of product and consumption of the food.

Branded operators in this category include Greggs, Pizza Hut (takeaway), McDonald's, KFC and Subway.

3) Leisure Dining

This is the broadest category of foodservice and can incorporate a number of food styles and types. The ambience and environment in Casual Dining is as important as the food, drink and service provided. Leisure Dining is not cheap but does provide a 'value for money' offer.

Branded operators in this category include Prezzo, Frankie & Benny's, Noodle Nation and Pizza Express.

4) Finer Dining

Finer Dining is destinational, it is at the highest end of the foodservice provision. Food is not just consumed for its nutritional or refuelling properties, but forms part of an overall experience.

The surroundings and the way in which food is served and presented are to the highest standards. Finer dining is predominantly main meal focused but can include an element of snacking.

5) Social Drinking

This category incorporates Public Houses, Style Bars and Café Bars, but does not necessarily have to be alcohol led.

Branded operators in this category include JD Wetherspoons and The Slug & Lettuce.

The retail landscape has and continues to evolve and change – it remains in a state of flux. A clear understanding of what is, has and continues to drive change will help underpin a future successful town / city centre strategy. The ability to adapt and react quickly and readily to these changes is key to future success. Standing still is not an option.

There is also a realisation that successful town centres will be those with multiple purposes and multiple reasons for use and drivers of 'footfall'.

Online will always be 'part' of the mix of retail activity, as will out-of-town and edge of town.

Currently many town / city centres have the wrong type of space. Addressing this with flexible and adaptable policies and interventions will be a key challenge. There is a role for local authorities to 'facilitate', providing the right space and environment for different formats. Wrong type of space includes small units in the core retail areas, as much as poorly occupied tertiary space. However the hue and cry of 15% vacancy rates has subsided, as new occupiers have emerged and town centre boundaries are adapted.

National planning guidance is focussed on town centre first, then accessable adjacent sites and even remote sites should be accessable to town centres.

There is an ongoing role for out-of-town retail, but this needs to be a symbiotic relationship with the role of town centres - a complementary one, serving the needs of those retailers that require large-scale retail space, easy access and on-site parking, to provide a destination offer.

The Government's decision to limit the use of mezzanine space in out of town retail sheds was implemented to help tip the balance of favour back towards town centres.

London and the South East continue to outperform other areas, with Chichester cited in the top 3 for rental growth.

The success of town / city centres of the future hinges on multi-functionality, diversity and understanding the role that towns / city centres can play in encouraging dwell time and social interaction; while 'convenience' remains the watch word at the heart of the town centre's appeal.

Understanding what drives the footfall in a location is vitally important and where retail is a key driver this needs to be maintained and built on, not lost. An important future objective therefore is understanding the drivers of footfall and to keep and grow these.

Town centre 'content' will continue to change and evolve, with 'content' much more than just shops and businesses - environment, markets, leisure, facilities, residential and other factors are increasingly contributing to the appeal of the location, making it a desirable place to visit and use on a regular basis.

Local Authorities will need to identify how to facilitate the provision of suitable offer, accommodation and facilities.

The retail offer is important to town centres and the national planning advice is to support town centres, through increasing the offer and diversity of the mix.

4 Town Centre Context

4 Town Centre Context: Supporting Evidence

Accepted National Trends

Source: Industry Property and Planning Specialists

- Role of town centres has undergone dramatic change over the past 30 years.
- Over-prioritising of retail in town centres has led to offices and key civic uses being located out of centre, this in some cases has led to reduced activity, footfall and vitality.
- Squeezed expenditure and drive for value has led to growth of deep discounters filling anchor roles in some centres.
- Emerging from recession but growth is at a slower rate than previously.
- Economic downturn has had a major impact on the retail sector nationally.
- Special forms of retailing (including all non-store retailing) is increasing; in 2013 it was equivalent to 11.5% of total retail, Experian predict this to be 11.9% by 2020 and for comparison goods from 14% to 15.5%.
- Home delivery has become commonplace in the convenience sector. This trend is undermining the anchor role that large food stores traditionally fill in well-configured centres.
- Home delivery of comparison goods resulting in increased leakage and reducing the amount of expenditure that can support local traders on the High Street.

Source: Beyond Retail, Retail Taskforce / BCSC

- Drift away from the High Street.
- Expansion of retail warehouse parks.
- Significant non-food ranges sold by supermarkets.
- More recently removal of bulky goods planning restrictions on first generation retail parks – examples of locations now including; M&S, Next, H&M, Argos, Boots, New Look.
- In many cases town centres have the wrong type of space; lacking the large units to allow showrooming, full range merchandising, high levels of technology and an improved shopper environment - with larger centres and out-of-town the beneficiaries.

"Out-of-town retailing remains popular with national retailers where they can comply with planning restrictions on the range of goods sold. While planning policies have slowed down the growth of out-of-centre retailing, the sector continues to mature and move away from bulky goods retailing to the provision of large two level stores providing fashion and homewares. Continuation of this trend will further challenge the future vitality of many high streets."

Source: Multifunctional Centres: a sustainable role for town and city centres, Institute of Place Management (2016)

- In town centres have struggled to compete with out-of-town developments as traffic congestion, older retail environments, non-family friendly spaces, lack of car security and car parking charges have made town and city shopping centres less attractive.

4 Town Centre Context: Supporting Evidence contd.

Accepted National Trends contd.

Source: Policy Implications of Recent Trends in the High Street / Retail Sector (2014), Department for Innovation and Skills

- Increase in vacancy rates over the last decade.
- 2008/9 recession and subsequent slow growth has had most impact on centres already struggling.
- Charity shop floorspace has increased over the past decade (medium sized centres most susceptible).
- Independently owned floorspace also risen.
- Size of centres remained stable over last decade = little or modest physical change.

Recent Trends in Retail and High Street Use – Drivers of Change;

- Technological advances (reduced demand) for retail space.
- Large-scale switch to discounters.
- Consumers increasingly seeking a 'shopping experience' (tends to favour larger, high quality destinations).
- Rising popularity of out-of-town for purchase of larger items, e.g. furniture.

The report considers that these trends have had a negative impact on high street footfall, spending and vibrancy.

Source: Town Centre Futures Report (ATCM)

- Footfall decline.
- Vacancies.
- Convenience stores, leisure, cafes and restaurants have seen rapid growth in some areas.
- Durability of UK upswing looks increasingly assured. Experian GDP growth forecast at 2.6% and 2.5% in 2015.
- Population change.
- North / South divide in terms of growth and expansion with London and the SE outperforming the rest.
- Rise of online shopping.
- People engaging with online retail differs between locations. London high level of technologically aware vs. Midlands with value driven bargain hunters and 'internet entrepreneurs' (e.g. using eBay).

Summary of key issues facing town and city centres

Source: Town Centre Futures Report (ATCM)

Town centre decline well researched as are the causes namely;

- Pressure on consumers and businesses in the wake of the economic difficulties after 2008.
- Problems of governance and town centre policy making.
- The rise of large format retail, out of town and supermarket competition.
- Emergence of multi-channel consumption, particularly ecommerce.

4 Town Centre Context: Supporting Evidence contd.

Summary of key issues facing town and city centres contd.

There is a need to be forward thinking not backward looking. 2012 Town Centre Futures Paper focused on 5 related drivers of town centre change up to 2020;

- An ageing consumer base.
- Rapidly changing consumer behaviour.
- Economic uncertainty.
- Local resilience (business, community, place and people).
- Technological change (specifically digital and e-commerce).

Last decade has seen significant change in town centre occupation. Latest Experian data shows some of the categories that have experienced the greatest declines.

Categories	Change in Total Units 2004-2012
Music Shops	-45%
Greeting Card Shops	-32%
Travel Agents	-31%
Off Licences	-21%
Bookshops	-19%
Pubs	-8%

On the other hand certain categories of town centre occupiers have undergone significant growth.

Categories	Change in Total Units 2004-2012
Convenience Stores	+153%
Cafes	+75%
Betting Shops	+43%
Charity Shops	+34%
Fast Food Outlets	+30%
Restaurants	+20%

- Convenience store growth is a sign of the growing trend towards a 24/7 retail culture.
- Growth in cafes and restaurants indicates the growing importance of retail space as leisure space. These uses encourage dwell time and social interaction. Also demonstrates the role that town centres continue to play in promoting leisure and socialising.
- Charity shops = constrained finances.
- Betting shops = growth in both online and offline gambling.
- Economy is discussed as experiencing growth now post-recession, with growth in earnings and employment and a buoyant housing market. The view is that the challenge for town centres and retailers is maximising the potential of this growth. (This now needs to be viewed cautiously.)
- London and South East both ahead of UK average in terms of growth (3.1% and 2.9%). East of England also slightly ahead at 2.6%. UK average is 2.5%.

Source: Retail Myths, Savills (2015)

- Outside of Greater London the top performers for rental growth are forecast to be; Winchester (3.4%), Bath (3.2%) and Chichester (3.1% p.a.).

5 Retail Outlook

The high street is still a proven destination but adapting it to changing consumer behaviour and to retailers' needs is paramount to future success; being flexible and adaptable not rigid and stuck in past policies and procedures is essential.

Convenience consistently tops the list in operator surveys The Retail Group has undertaken nationwide, as the main reason for visiting a location. Convenience is the high street's biggest asset, the challenge is identifying ways in which to make your location 'ultra-convenient', so that it is the easy choice.

Increase in the proportion of consumers of working age is the real driver of change and is potentially being missed by many. These shoppers have a heightened requirement for convenience, they are time poor, 'ease' is important and they value their leisure time.

Shoppers are still heading out of town, to those centres that either provide a strong reward, or to the schemes that are relatively quick and functional in terms of use and offer.

Retailers will also choose to locate in out of town locations where no suitable in town space exists or a single store can have wider appeal as a result of access.

However research is showing that city centres and town centres remain popular locations for consumers for a variety of purposes. The variety of potential uses is a core strength for traditional retail centres of all sizes.

'Click and Collect' potentially has an important role to play in driving footfall into town and city centres. Driving this footfall into both stores and centres has a positive effect on turnover not just for the individual store but surrounding operators and the centre itself.

Shoppers like to shop, they like to go 'shopping' but increasingly they like to combine it with leisure and to 'make a day of it'. The focus going forward is less on 'retail', with town and city centres becoming multi-functional with a more diverse offer. The right type of catering, food and beverage, and associated leisure offers is key to healthy town centres.

Speciality towns (of which Chichester is identified as an exemplar for others to emulate) are identified as growth and sustainable centres.

Local Authorities have a bigger role to play in exerting control and helping to bring about well-planned change.

5 Retail Outlook: Supporting Evidence

High Street is STILL a destination

Source: Deloitte, High Street Review – October 2013

"High Street remains a key destination for many customers"

"The majority of consumers use the High Street as a main destination for top-up food, grocery shopping, health and personal care and clothing and footwear"

"Research also shows that for the majority of consumers the High Street is the main destination for services such as banking or leisure and visiting coffee shops"

"A large proportion use the High Street for eating or going out"

"Parking remains a controversial issue, especially cost…it is a critical feature in the reinvention of the High Street, if it is to become a place for people to pick up goods purchased on line"

Adapting to Local Demand

Source: Deloitte, High Street Review – October 2013

"Consumers need to be brought back to the heart of every proposition in the High Street"

"As the grey pound becomes more important, an ageing consumer base will increase the requirement for accessible facilities, health services and public conveniences"

"57% want to see more independent stores and one in two want more specialist grocery shops, such as a baker or butcher"

"Nearly half of consumers would like to see more community activities such as festivals and markets in the High Street"

Growth of Click and Collect

Source: Industry Property and Planning Specialists

- Click and collect has the potential to contribute to the levels of vitality on the High Street.
- Distinction between online and instore shopping channels is becoming less clear cut; click and collect and multi-channelling means that bricks and mortar stores will continue to play an important role in enhancing the shopping experience.

Town Centres Fighting Back

Source: Shopping Centre News 'Town Centres Fight Back'

- New research reveals shoppers still favour their local town centre over online shopping.
- BRP (Bracknell Regeneration Partnership) surveyed 2,000 shoppers around the UK, with over half (68%) claiming to visit their local town centre more than or as much as they shop online. Over half of those polled (54%) visit their town centre at least once a week, with one in ten visiting every day.
- Over three quarters (83%) of those polled choosing to shop online more than they did 5 years ago.

5 Retail Outlook: Supporting Evidence

Town Centres Fighting Back contd.

- Online shopping is most popular with younger shoppers, with over half (69%) of under 34 year olds shopping online more or as much as in-store, while 51% of those aged 35 and older preferred to shop in store.
- Research finds that convenience is the town centre's biggest asset, with almost half (47%) of those polled citing easy access as the best aspect of the town centre. The leisure offering is another important asset to the town centre, with over a quarter (26%) of young people saying that they like to make a day of it when shopping in their town centre, visiting F&B and leisure facilities as well as retail.
- In-store technology also plays a part in enhancing the shopping experience with 83% of those polled using some form of technology as they shop and almost a quarter (22%) using Wi-Fi while shopping. The younger age groups are the most technology savvy when it comes to shopping, with 80% of 18-24's using tech in some way compared with over half (52%) of people aged 55+ who don't use any technology in their shopping experience at all.

The results demonstrate that online shopping is more frequent in younger adults, but that a good mix of experiences, such as F&B and leisure, and use of technology, can help draw these shoppers to their town centre.

Reduced operators' space requirements

Source: Industry Property and Planning Specialists

- Major retailers are likely to pursue a cautious expansion programme in the short-term.
- In the last 20 years retailers have been slowly consolidating in a smaller number of larger centres leaving small and medium centres struggling to attract investment and representation. This pattern has been exacerbated recently as multiple retailers have reduced their floorspace requirements by using a combination of a few large flagships supported by smaller satellite shops and strong online presence.
- Role and function of town centres set to shift from being primarily a shopping destination to more of a leisure-centric and community orientated destination. Positively responding to these trends with policies that support adaptability will be key to successfully driving footfall and vitality.

Multi-functional Centres

Source: Multifunctional Centres: a sustainable role for town and city centres, Institute of Place Management (2016)

- After several decades of mono-functionality focused on retailing, centres are re-emerging as multi-functional ones, supporting leisure and recreation, employment, tourism, heritage, culture, housing, education, health and wellbeing as well as retail.
- A multi-functional centre means a diverse offer, they draw people in for a 'bundle of benefits' not just shopping.
- The need to diversify what town centres offer has been widely recognised – as also referenced in the 'Beyond Retail' Report.
- For the multi-functional centre 'activity levels' are the new KPIs – how much is the centre used, when and for what?

5 Retail Outlook: Supporting Evidence

Multi-functional Centres contd.

- Requires stakeholders to work together to deliver a better, collective experience – an engaged community can be an important asset.
- Catering for the needs of the ageing population, such as wellness services, restaurants, entertainment services, cafes, high class products and good store and car parking facilities.
- New era of multi-channel retailing, coupled with the increasing techno-savviness of today's consumers poses a great opportunity for retail locations to integrate multiple channels into the shopping experience.

The report uses footfall signatures (extensive analysis over 3-years) to identify the different ways town and city centres are being used and provides clues as to how the centre can better meet their needs. There are four town types identified, Chichester would be a Speciality Town;

1) Comparison Shopping Towns
2) Holiday Towns
3) Speciality Towns – *"need to offer something distinctive and unique"*
4) Convenience and Community Centres.

Speciality Towns;

– Used by locals and visitors
– Offer attractive sites for retailers who are re-positioning and perhaps want to provide a reduced but premium offer in a smaller footprint than they may do in a major city centre.
– Likewise they can (access permitting) provide opportunities for showrooms and collection locations for larger retailers.
– Also demand from specialist independents and smaller chains. They may often require affordable but distinctive premises.
– Offer real opportunities for modern market development perhaps incorporating some shop units, restaurants and cafes with underground or roof parking for traders.

Future Outlook and Resilience

Source: Town Centre Futures Report (ATCM)

Challenge for town and city centres is in capturing the upswing in disposable income and in ensuring they continue to offer value for money to price conscious shoppers.

Trend to shop online is growing ever stronger. Experian predict by 2025 as much as £1 in every £5 is likely to be spent online. Ensuring this is a core part of any retailer's offer is key.

Whilst unemployment is declining there are still high numbers of young people who are unemployed. From a retail perspective this will impact on their ability to consume products and services as prior generations have done.

Outlook better in London, the South East and East Midlands. Less so in the North West, West Midlands and North East.

5 Retail Outlook: Supporting Evidence contd.

Future Outlook and Resilience contd.

"Current resilience will set the tone for the coming years, and will make the job of revitalising town and city centres harder or easier dependent on the business outlook". Poor resilience will have a knock on effect to issues such as employment, local income levels and town centre occupancy.

Impact on Town & City Centres

Source: Town Centre Futures Report (ATCM)

"Although we can only speculate about the impact of demographic change, we can draw a number of logical conclusions. First, the growth in the number of older people in society will have an obvious impact on pension provision and health costs. Considering the elderly have the lowest incomes of any adult age group (although some have significant asset holdings), it is possible the growing size of this group may depress overall consumer spending.

We might also assume certain businesses will benefit from the ageing population such as those providing health services, mobility products, or organised holidays. However, it would be wrong to assume the elderly of the future will behave like those of yesteryear. Indeed, many of the post-war 'baby boomer' generation who are now reaching retirement are both technologically savvy, fashion conscious, and driven by a very different moral code than their parents. We should assume they will want many of the same products and services as younger consumers.

An ageing consumer base is likely to increase the requirement in town centres for certain facilities such as good access, health services, and public conveniences. It is also likely to lead to a growing demand for safer and cleaner local environments for socialising and leisure activities, with a focus on facilities such as cafés and community centres. Furthermore, the evening economy may become more important as a means to attract older consumers looking for local entertainment and cultural experiences, beyond the traditional alcohol related activities commonly associated with town centres.

The expected decrease in the proportion of young consumers will also have an impact. For instance, we can speculate this may lead to less demand for particular services, such as bars, which appeal to this group.

Yet, it is the increase in the proportion of people of working age that is perhaps of greatest significance. This group typically encompasses time-poor families, who - as we have increasingly seen in recent years – are value led, a trend which is unlikely to diminish in the face of economic constraints and burgeoning choice, both on and offline. It is fair to assume that this age group in particular will continue to drive the trend towards highly convenient value led retail and leisure for the foreseeable future."

5 Retail Outlook: Supporting Evidence contd.

Multi-channel and Technology

Source: Town Centre Futures Report (ATCM)

Behaviour varies by region. Experian list the top three types by region – South East 'Top Three Digital Segments':

- 'Newshounds' – Strong appetite for current affairs.
- 'Trackers' – Use internet to track investments.
- 'Day-time shoppers' – Online during the day, including Mums with kids at school.

According to a recent google study, the UK is one of the most connected countries in the World; 30% use a tablet and 62% use a smartphone.

'Right Size' Development

Source: TRB Retail Bulletin June 23rd features article on 'New Report: Shopping Centre Plans ditched as UK retail sector reshapes'

Quotes a recent Colliers Report – Colliers International Midsummer Retail Report.

"The market is responding to 'right size' in the development pipeline. Shopping Centre schemes are progressing but focused on locations with wide catchment areas and strong demographics."

There is also a growing trend to extend existing successful centres.

Colliers said the market reports that there is good retailer demand for new out-of-town retailing space in strong locations.

While UK shoppers are increasingly heading out of town to shop, the retail landscape in many town centres remains a concern.

Local Authorities must play a growing part in dysfunctional centres exerting co-ordinated control than can bring change, e.g. formal structures such as the town centre investment zones being proposed by the British Property Federation.

6 Future of Retail

The age of 'Retail Darwinism' (as described by one industry leader) perfectly illustrates the current state of play – those retailers and centres that actively adapt and change will fare the best; 'survival of the fittest'. Some operators will continue to decline, others including the mostly multichannel operators will continue to expand, while other new players will enter the marketplace.

For town and city centres, the aim is to go 'beyond retail'; retail alone is no longer the lynch pin to a centre's success, instead the centre has to fulfil a variety of functions attracting and catering for a full range of consumer groups; residents, workers, students, visitors.

The centre also needs to entertain and offer an experience, it needs to be more than 'just shopping'.

Examples of the major shopping destinations, Liverpool ONE, Bullring, Leeds Trinity, etc. shows evidence of and the reward from providing investment in new space and offers, proactive strategies and collaboration with private and public partners in delivering change and attracting 'new' retail names and brands to their locations.

These major locations have all added new dimensions to their offer, bigger stores, specialist niche curated offers, varied food and beverage themes and offers, leisure and even cultural elements.

All of the larger centres have nearby major out of town offers, malls and shopping parks; it is the mix and variety that enables them to compete and attract both retailers and consumers.

The next tiers of centre, the smaller cities, larger towns and speciality towns will need to identify ways to learn and apply the lessons that are appropriate to their town.

Embracing technological advancements and understanding ways in which consumers want to interact with you has become ever more important.

Retail will continue to be an important and core element of town and city centres; it needs to be planned for and improved.

The impact of uncontrolled and poorly managed out of town retail activity has been noted on centres across the country, as has the removal of other town centre footfall drivers such as employment and leisure. Current and future policy guidance is clearly focussed on improving and protecting town centres, whilst enabling change and evolution of the offer.

Retailers are 'upping their game', so too must town and city centres.

6 Future of Retail: Supporting Evidence

Liverpool One Case Study

Source: The Retail Bulletin Issue 1 'Future of Retail'

- Much more to shopping than just shops. Shoppers want a day out, an opportunity to socialise with friends, to be entertained and to experience something new.
- Entertainment is key – events programme alongside a good variety of restaurants and leisure facilities.
- Clustering together businesses that feed off each other, creating clearly defined districts.
- In the last 12 months 20 new brands have opened.
- Another growing trend is for retailers to be aligned with owners, working all possible channels as one.
- Retailers are pulling the fulfilment of online purchases back into stores. Some operators contend that for every £1 collected the customer spends another £1 in store. Same is true for operators bringing shoppers into the scheme for click and collect, this can lead to upselling and sales elsewhere or simply increasing turnover in the car park.
- Consumers now leave a "digital exhaust" – the trail of breadcrumbs of every impression, click, view and basket addition.
- Lots of references to 'Big Data' – opportunities, pitfalls and complexities.

The Retail Revolution

Source: The Retail Bulletin Issue 1 'Future of Retail'

The article quotes a report from the British Retail Consortium (June 2016) which predicted that the retail sector was facing the loss of 900,000 jobs in the next 10 years. It suggested that up to 74,000 shops could shut in the UK, with already economically fragile areas; such as Wales and the North of England being hardest hit.

Time for Retailers to Work Smart

Source: The Retail Bulletin Issue 1 'Future of Retail'

- Shopper technology is described as only one of the three pillars – product, service and technology – that help maintain structure and deliver success in store.
- Premium retailers are leading the way, in terms of what to expect from the stores of tomorrow. With the benefit of a small 'flagship' portfolio and large marketing budgets.
- In the race to bring shoppers the next and the new, retailers forget an overriding consideration – as shoppers, we want to shop. Day to day, most of us want stores to place great retail standards, ease of shopping and personal, attentive service *above* the value of retail teams holstering the latest iPad or placing virtual mirrors in changing rooms.

6 Future of Retail: Supporting Evidence contd.

Omnichannel Opportunity

Source: The Omnichannel Opportunity, Deloitte (Feb 2014)

- How can retailers realise the Omnichannel opportunity?
  - Using instore technology to enable shoppers to browse full / alternative product offers and place orders; using the store as a display site, combined with home delivery options; as a collection point for online and mobile; or as an experience place to build loyalty.

"As Omnichannel becomes pervasive, embracing these trends effectively and promptly and continuing to adapt to technology-enabled changes in consumer behaviour can enhance retailers' competitive positions."

- How to..? Includes 'redefining the store';
  - Retailers will need to re-evaluate their portfolio of retail sites and make the most of stores as part of the omnichannel experience – for example by leveraging technology to enhance the store experience, using some outlets as flagship stores, or adapting some stores to be used as collection points.

"In the Omnichannel environment, the role of the store shifts from driving sales of the product in-store, to being a brand and product showroom that drives revenues across all channels."

- A survey of British retailers revealed that 81% anticipate a decline in the number of stores, while 54% anticipate decreasing the size of their existing stores.
- Although the role played by stores is changing, stores are still a key component of retailing – brands that previously only had an online presence are now considering opening stores.

"An effective and broad online presence can contribute to driving foot traffic into physical stores."

Survival of the Fittest – 6 Key Trends impacting the retail experience

Source: The Retail Bulletin Issue 1 'Future of Retail'

We are living in an age of "Retail Darwinism" – only the fittest, i.e. those that take these developments on board, will thrive;

1) Death of the line x 3
   - Shop less by category more by lifestyle, interests and social groups
   - Blurring of line between store and shopping centre = a more integrated experience
   - Death of the 'hermetically sealed' shopping zone that turns its back on the community = zones will be more open, integrated with streetscape and urban grain.
2) New Players
   - Different cast of players taking space on the high street including online pure players, FMCG brands, media / broadcast brands and entertainment brands.
3) Data
   - Lots of new data, creating revenue models by behaving more like a media brand. Turnover rent will be less relevant as more sales will be non-store sales.
4) The Collect Experience
   - Click and Collect will become more popular. Collect must become more than just an administrative process at the back of the store – it should be at the heart of the store experience. Expect shopping centres to innovate in this area.

6 Future of Retail: Supporting Evidence contd.

Survival of the Fittest – 6 Key Trends impacting the retail experience contd.

5) Integration of food and beverage and retail
   - Shopping in physical stores becomes less about transaction and more about immersion into a brand, learning, personalisation, brand rituals, social networking and entertainment.
6) Digital signage
   - In larger stores and shopping centres an opportunity to create branded ‘way showing’ (as opposed to way-finding) made up of signage elements, gestures, landmarks, landscaping furniture, etc.

7 What could these trends mean for Chichester?

Setting the Scene; Chichester Catchment / Background

Source: Chichester Retail Study, CACI's Retail Footprint model

- Chichester's retail catchment contains 1.1 million residents with annual comparison goods expenditure of £3.0 billion.
- According to CACI's Workday Wallet dataset, an estimated £187,300 per year is spent in Chichester on retail / catering shopping trips originating from place of work.
- CACI estimate that 1.2 million tourist visitors per year are currently being attracted to Chichester, bringing additional expenditure of £20.2 million on retail goods and £5.4 million on catering to the town.
- Chichester has a resident population of circa 27,000 and also has over 3,000 students (2011); dominant age groups those in the 30-59 age bracket.
- CACI estimate that £41.4 million of spend on comparison goods and catering will be generated by new residential development in Chichester's catchment between now and 2016, of which £13.0 million will be captured by the town.
- Incorporating consumer expenditure and population growth, annual comparison goods expenditure being drawn to Chichester is forecast to rise to £539.0 million in 2016.
- Chichester has an affluent ACORN profile; it is dominated by Affluent Greys and has strong representation of Wealthy Executives (the most affluent of all the lifestyle groups).
- Chichester's market size and ACORN profile make it similar to towns such as Shrewsbury, Canterbury, Bournemouth and Eastbourne.
- Compared to similar sized towns with similar shoppers, there is an under-representation of Value retailers in Chichester, balanced by moderate over provision of Premium retailers, which is an advantage for the town. Overall Chichester's market position is predominantly mid-market.
- Overall, Chichester represents an excellent opportunity for good quality mid and upper-mid market retailers and leisure operators to satisfy strong demand, particularly from residents and tourists, and take advantage of current gaps in provision.

Source: Retail Update 2010 DTZ

Describes Chichester as follows;
"Chichester has a very attractive historic city centre, which is an appealing place to visit and spend time. The centre attracts visitors from outside the local area on day trips, but the environment is also geared towards a functioning retail centre for the city itself and its surrounding catchment area."

"The retail units are predominantly contained within historic buildings; and as such are generally at a domestic scale, which is smaller than would be expected from prime retail units in a centre of similar hierarchical significance elsewhere. However, the many small shops add to the charm of the city centre and help to create its unique environment."

7 What could these trends mean for Chichester? contd.

The report concludes…

"The city centre has a delightful and high quality shopping environment, the Cathedral and other fine features, which mean that it attracts many visitors from beyond its natural catchment area. The main weakness of the city centre is the lack of available opportunities for new retail development of larger shops and stores to accommodate the strong retailer demand. However, this is balanced by the large number of small shops, many operated by independent retailers, which substantially add to the charm of the shopping experience."

There will be a high requirement for stakeholders to work together to create a true multi-functional centre and to ensure an integrated and co-ordinated city centre offer and experience.

Chichester is already well placed, characteristic of a 'speciality town' it already has a wide variety of consumer groups and reasons to visit, with an established visitor base.

The 'multi-function and multi appeal' of the city centre has helped Chichester to achieve the success it has to date. It is clear that in order to sustain continued growth the established footfall drivers need to be sustained and enhanced. Removal or reduction of major footfall drivers will not only strip out elements of the city's appeal, they will also impact on the remaining offers' performance.

Chichester has strong demographics and a proven multi-purpose / multi-consumer group base, but must not 'rest on its laurels'. It will need to continue to expand the mid-market, quality offer in all sectors. Issues and challenges include small shop units which will appeal to some, but how can it also provide some additional larger city centre ones for others? The Council will need to consider all opportunities to identify ways to increase the city centre provision and offer. Future policy will need to focus on city centre first, with innovative solutions to the provision of suitable trading space for the already identified demand.

The dynamic nature of the sector as demonstrated by the research means that continually improving and enhancing the city centre offer is essential. Improvements to choice and offer, delivering value and quality, ensuring integration and ease of use and creating an enjoyable 'experience' – one that people want to repeat.

Chichester needs to expand its multi-channel appeal and this might include additional edge / out of town facilities for appropriate operators and activity, those operators that do not typically occupy town and city centre space such as; large sports, active leisure, home, electrical stores. The additional out of town provision will need to be provided after improving the core city centre, as a second priority after the city centre enhancement.

Future policy and planning controls will need to be in place to support the city centre and adjoining opportunities, and limit any out of town activity.

Understanding the important role that digital and social media now play in information finding, recommendation and social interaction whether this is via websites, provision of City Centre Wi-Fi access and / or creating a destination that can be 'liked' raising the profile and awareness of the location will drive visits and increase appeal.

7 What could these trends mean for Chichester? contd.

- Consumers want experiences.
- Consumers want multiple rewards or reasons for using a centre.
- Consumers seek reasons to choose a centre; they are looking for ease, value, quality, shopping as well as eating / drinking and leisure.
- Shoppers are increasingly shopping by a variety / combination of multiple channels.
- Multi-channel is delivering multi-formats.
- Shoppers like big stores and small specialists.
- Retailers like and benefit from multi-purpose centres; they both 'feed off' footfall and 'share' footfall.
- Retailers are increasingly trading in multi-formats.
- Retailers will choose out of town, if no suitable in town provision is available.
- Retailers are investing in the larger centres and in high impact stores.
- For Chichester there is a clear objective to retain and to improve its city centre offer.
- Chichester will need to enable more formats and changing types of retail presence.
- The city centre offer will need to include more F&B and more leisure in the future.
- Chichester City Centre as a first step needs to ensure all existing non-retail attractions / attractors are integrated as part of a collective city centre offer.
- Chichester will benefit from a broad range of events that offer diversity, with a level of frequency that drives regular footfall through additional reasons to visit.
- Measuring, monitoring and seeking to continually improve 'ease of use' will help ensure continued appeal.
- There is a role for managed and controlled out-of-town as complementary to the city centre and in parallel to / alongside ongoing city centre change and improvement.

Chichester is well placed to take advantage of the proven consumer and retail trends identified in this report. The key is to build on its existing strengths, its retail offer and multi-reasons for visiting the city centre, by maintaining its convenience, its ease of access and ease of use, whilst providing additional layers of experience not found online or in nearby competing towns and cities.

Summary

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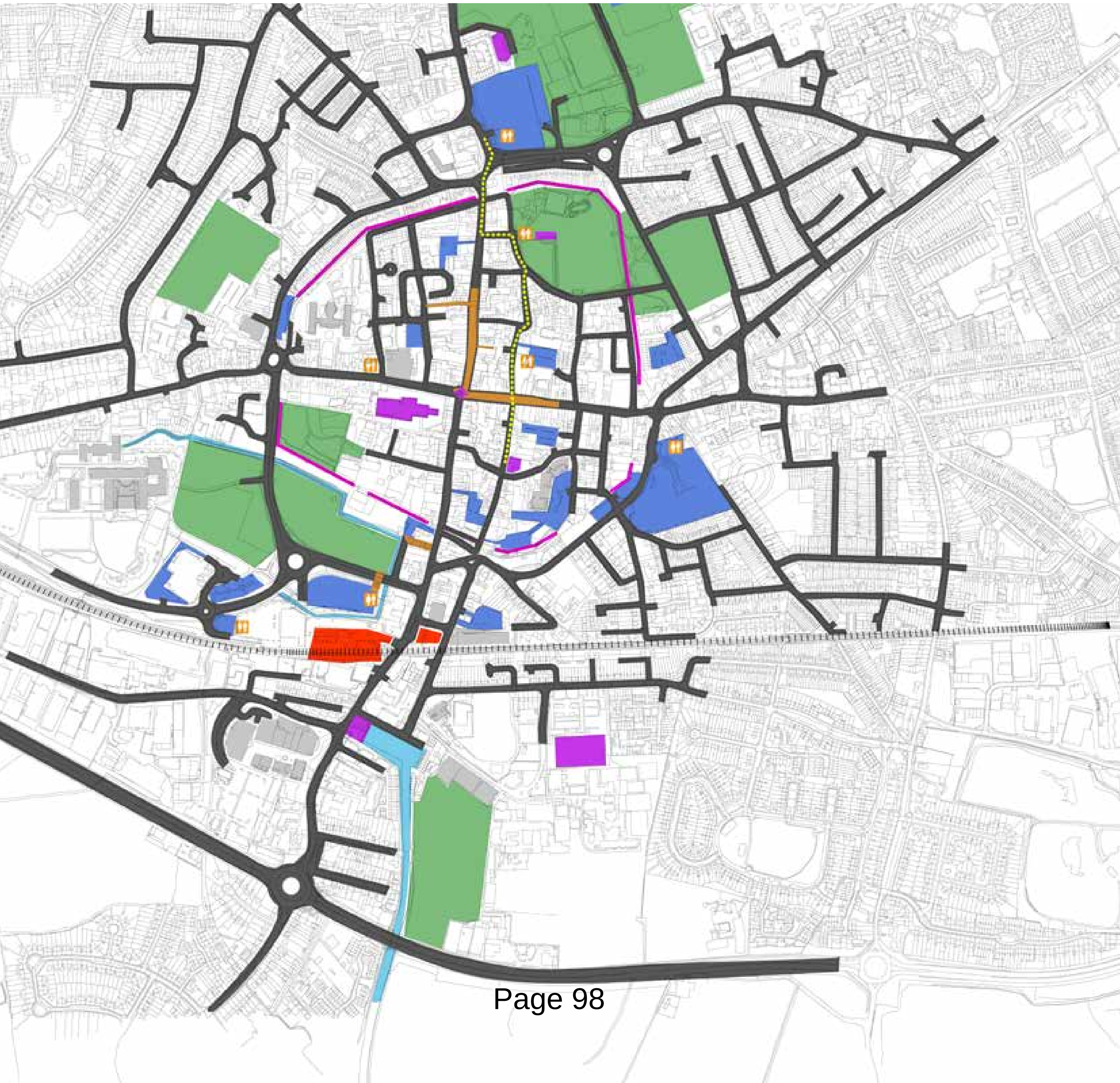
Chichester Vision

City Centre Audit

July 2016



Contents

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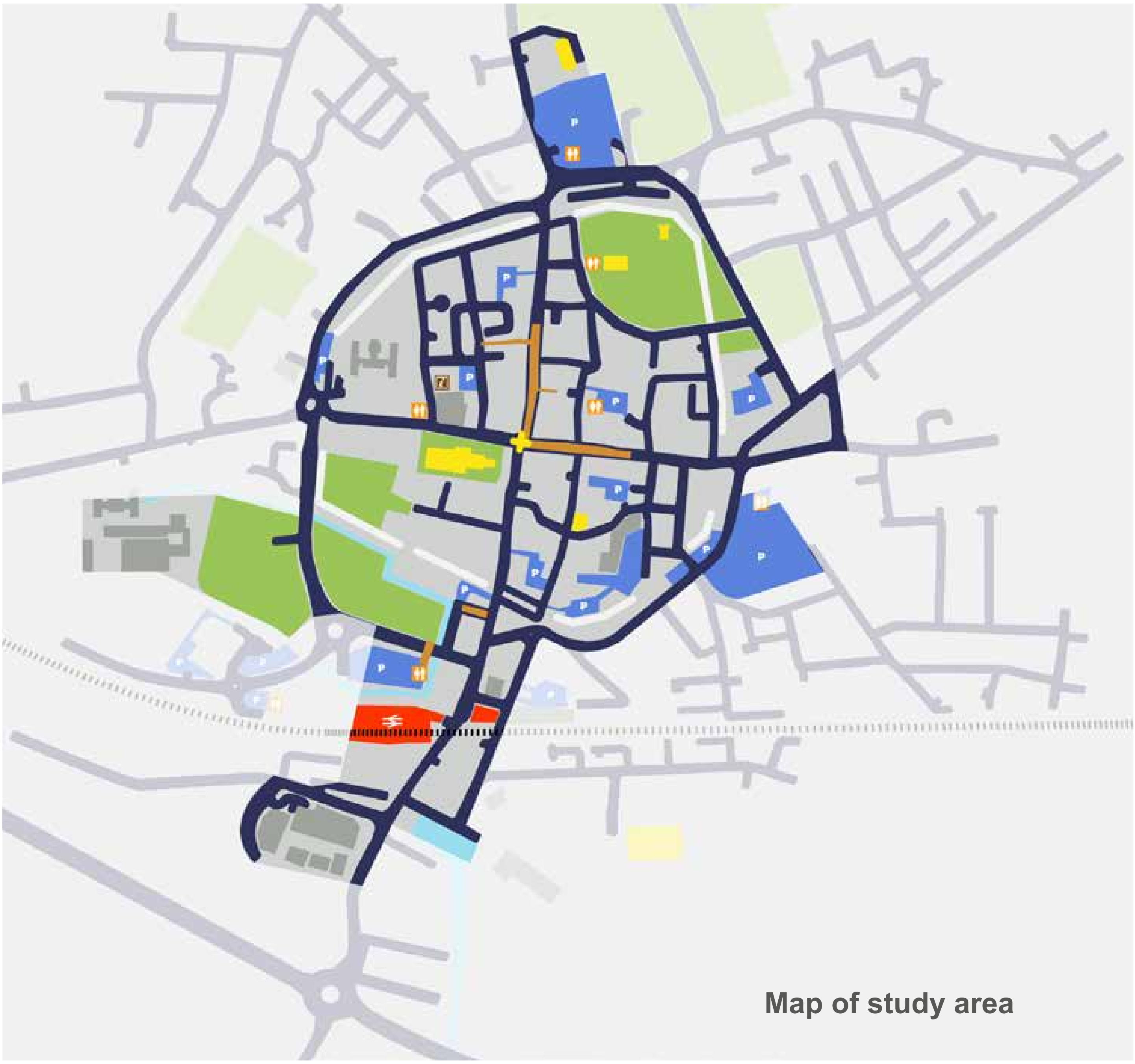


Map of study area

Aims

Chichester District Council is committed to developing a strategic direction for the City that will help to inform Council policy for the next twenty years. To that end, a number of activities have been undertaken to gather insights and opinions to help develop initiatives that will ultimately form the basis of the Vision.

Although it is important to look forward to see how Chichester should respond to the needs of its future population and future visitors, it is important to start by establishing a base-line reference of the City in terms of its character and condition, the ease of access, physical assets and the diversity of its local economy. To do this an 'Audit' has been carried out and the results feature in this report.

Approach

Undertaken in May and June 2016, the audit is an independent observational study. Whilst it has made its own observations, it also refers to other relevant studies that provide a more in depth level of detail than is possible under the scope of this project. However, the audit was conducted by establishing a series of headings that cover the main aspects of the City. The information gathered aims to help identify specific priorities that will determine future initiatives as part of the Vision.

The area studied generally relates to the conservation area, which is the City Centre within the old walls, extending east to include St Pancras and the Hornet, northwards to include the Festival Theatre and University, westwards to include the College and southwards to include the Canal Basin and Chichester Gate.

Headings

To cover all aspects of the City, the scope of the audit was determined by agreeing the following headings:

Public realm and the built environment
Captures the overall character and condition of the study area, generally recording the mix of building types and architectural styles. In addition to buildings, the public realm and built environment encompasses all public areas including parkland, walkways and pedestrian areas, car parks, transport hubs. Public realm also includes amenities such as public toilets and street furniture.

Legibility and permeability
Legibility is concerned with the provision of information or wayfinding. It is generally more useful to visitors, whilst permeability affects both residents and visitors, and considers the streetscape, the overlap between different users (motorists, cyclists and pedestrians) and general accessibility.

Culture - arts and heritage
Considers Chichester's long history and wealth of heritage assets. Culture, including the visual and performing arts and heritage is central to the City and underlines Chichester's unique qualities, contributes to the quality of life and plays a significant role in defining a sense of place.

Business and commerce
The success of the City is directly linked to a vibrant local economy. The Audit has gathered information from local business groups including the Chichester Chamber of Commerce and Industry (CCCI) and the Business Improvement District (BID). In addition, a separate study has been commissioned to determine the impact (on the City Centre) of current and future trends in retailing, including the continued impact of the internet and increase in 'out of town' retail.

Population
Inevitable demographic changes will require strategies that ensure the city has capacity to adapt and respond to new demands in population growth and social change. The Audit has reviewed data available from the 2001 and 2011 Census for the four main electoral wards which extend beyond the city walls.

Method

The primary objective of the Audit is to gather observations by walking the study area repeatedly, and by consulting with special interest groups and partners in the vision process. Other information has been obtained from previous studies made available to the project team and by conducting specific research such as the retail study.

To provide informed opinions and insight, a number of consultees were interviewed and are listed in appendix 3.

The primary goal of the Vision is to make Chichester an enjoyable and prosperous place for residents and local business, as well as to support and attract tourism. It is therefore essential that, where necessary, the methods used in gathering observations take a user centred approach and considers different needs, motives and varying levels of mobility.

Through the creation of a series of walks based on typical user scenarios, it has been possible to observe and document the various aspects of the built environment and consider accessibility and how easy Chichester is to 'read' and understand as a place.

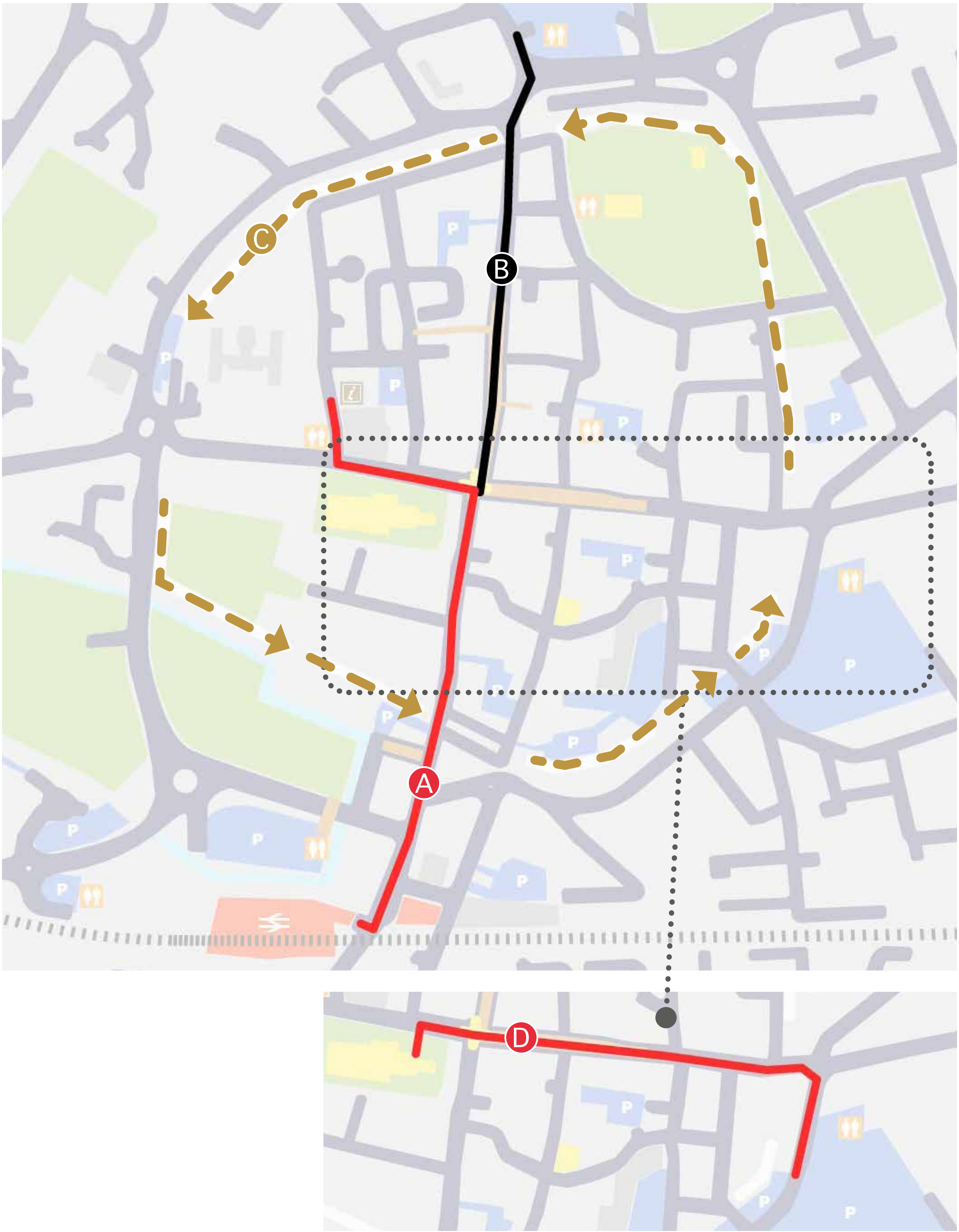
The scenarios that were applied are:

- The railway station to the Novium/Tourist Information Centre
- The Festival Theatre to the Market Cross
- The Cattle Market car park to the Cathedral
- Avenue de Chartres car park to Pallant House Gallery
- Finding the Tourist Information Centre
- Following the signs to the Pallant House Gallery from the Festival Theatre/Northgate car park
- Finding and walking the walls
- Finding Bishop's Palace Gardens
- Finding Priory Park
- Westgate car park to New Park Cinema

Each scenario has been walked and photographed.The survey notes that form the basis of this report are included in appendix 1.

All photographs used throughout this document were taken during the audit stage in May and June 2016. A selection of additional images are included in appendix 2.

Scenario maps



A The railway station to The Novium/Tourist Information Centre
B The Festival Theatre to the Market Cross
C Finding and walking the walls
D Cattle Market car park to the Cathedral
E Westgate Car park to New Park Cinema
F Market Cross to Bishop's Palace Gardens
G Following signs to Pallant House Gallery from Northgate/Festival Theatre car park
H Avenue de Chartres car park to Pallant House Gallery

Overview

From the observations made, it is clear that Chichester is an attractive city with a distinctive and diverse architectural character spanning more than 2000 years of habitation and development.

Positioned on a plain between the South Downs and the south coast, Chichester sits within a very attractive part of West Sussex, has a range of historic, cultural and religious buildings and hosts a diversity of events, including some that are internationally renowned. Furthermore, people are drawn to Chichester City by many other attractions including its proximity to the coast and to Chichester Marina, Fishbourne Roman Palace, West Dean College, and Fontwell Park Racecourse to name a few, plus a wide range of activities and events that take place on the Goodwood Estate.

Economically (although not immune from the effects of the 2008 financial collapse), Chichester is a reasonably prosperous city and, where some towns have seen their retail sector struggle, (resulting in empty shops and blighted high streets), Chichester has largely avoided the collapse seen elsewhere across the UK.

The economic environment we operate in is dynamic and the built environment needs regular care. But despite change being a constant reality, some people are resistant to it. It is therefore essential to manage change and not to be complacent. We need to take a balanced and proactive view in order to develop an approach that respects the past, whilst recognising that the future success of Chichester will require a Vision that is able to manage appropriate and necessary change.

This 'audit' reveals that improvements can be made in all aspects of the City starting with the point of arrival. We then need to consider the quality of the built environment and ways to better co-ordinate cultural activities and develop all forms of infrastructure.

Underpinning so much of how people experience Chichester is the impact of traffic and the management of the overlap between different users to make the flow around the City easy and safe. Although the centre of the City is largely pedestrianised, permeability is interrupted where pedestrian routes cross the north and south gyratory schemes, because priority is given to traffic. Due to the increase in through traffic and the effect of two level crossings (over the railway), traffic is frequently brought to a standstill causing widespread congestion and inconvenience. Although the northern gyratory includes a pedestrian underpass, the effect of the road layout around the city breaks vital linkages with locations outside the walls such as the station, canal basin, Festival Theatre and University. Solving these issues of pedestrian access will require compromise, but safe, simple linkages that suit different users are essential in making a place accessible and permeable. Consistent and easy-to-read information will then make the city easier to navigate for all users.

This page:
First impressions of Chichester at the railway station
Congestion caused when barriers are down
Examples of signage and map

Opposite page:
Cathedral from Bishop's Palace Gardens

To that end, the pedestrian signage and legibility in Chichester is generally poor, due to the inconsistent use of maps, and too many conflicting signs creating a cluttered and confused environment. Whilst in parts of the City there is no signage at all, and the use of maps on smart phones is unreliable due to poor network connections, the combination of the City being flat and having an iconic street plan should provide the basis of a very legible and intuitive wayfinding scheme that uses landmarks more effectively to assist navigation. Improving the streetscape, access and permeability will help people move around unhindered and provide a better setting for the landmarks and historic buildings.

Through the course of the Vision process it is possible to expose the core values of Chichester and articulate a unique and valuable sense of place that can strengthen Chichester's position as a quality destination. Therefore the Vision must by nature be strategic, but delivered through a series of tactical measures.

Audit

Public realm and the built environment

Clockwise this page:
The Council House
The Cathedral
St Pancras Church
The Library
The Market Cross

Opposite page:
The Pallant House Gallery

Character

In 2005 Chichester District Council conducted a detailed character appraisal of the Chichester conservation area, which includes the City Centre and extends beyond the walls in all directions. The conservation area is almost the same as the current study area. The character appraisal has recently been reviewed with consultation running to 3 June 2016.

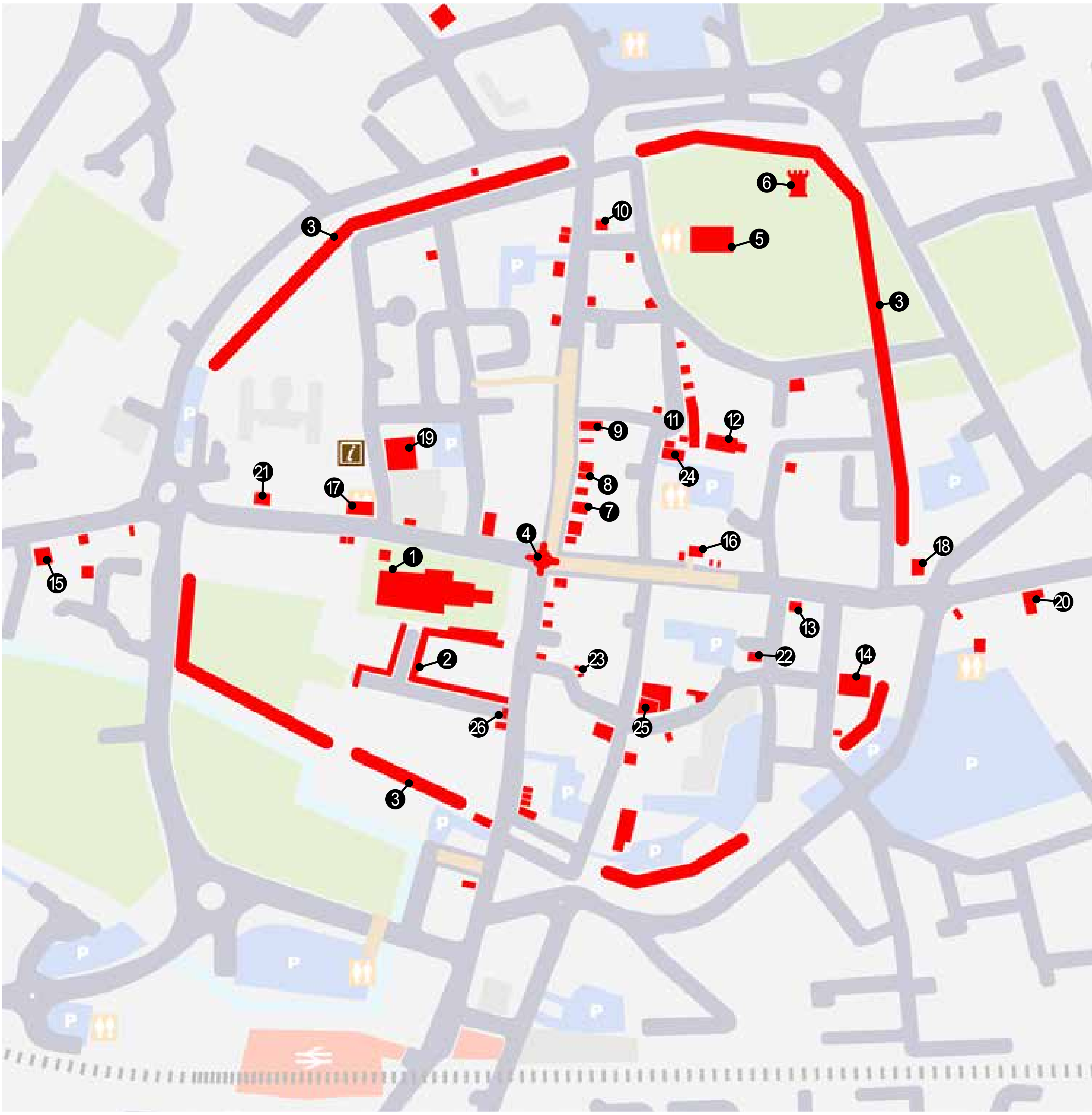
The character appraisal provides an authoritative and in-depth reference in terms of Chichester's history, character and context and states that "the prevailing character of the Chichester conservation area is late 18th century". However, it could also be said that Chichester today represents the many periods of development from its time as a Roman settlement, through various changes following the Norman Conquest and middle ages, to being almost entirely rebuilt in the 18th century.

Evidence remains of Roman town planning that created two principle routes north/south and east/west, bisecting at the marketplace and thereby dividing the settlement into four quarters. Later the Saxons built a wall that creates the boundary of the city we see today. Although the four main commercial streets still exist, the market square marked since the 16th century by the Market Cross has been encroached upon with the building of houses (and later shops) along North, South and East Streets.

The conservation area was created because of the following:

- The survival of Roman and Saxon Walls
- Survival of Roman and Saxon Plan form
- High concentration of listed buildings
- Continuous good quality townscape
- Chichester Cathedral and its Close
- Priory Park with the Norman Motte and Greyfriars Church
- Surrounding parks, gardens and recreational areas

Being both the administrative centre for West Sussex and the centre of the Diocese, Chichester has enjoyed periods of importance and prosperity. The architectural evidence of its changing fortunes (over the centuries), can be read through a rich mix of building styles and many notable buildings including the Cathedral (1091), the Market Cross (1501), the Council House (1731) and others that are listed and have local significance. However, the character of Chichester has continued to develop through the late 20th century with the Courtroom (1940) the Festival Theatre (1962), Library building (1965) and into the 21st century with the Pallant House Gallery extension (2006) and the new Museum or 'Novium' of 2012.



1	Cathedral & Bell Tower
2	Buildings of the Cathedral & its Close
3	City Walls
4	Market Cross
5	Chancel of the Church of the Greyfriars
6	The Motte + Bailey Castle (Roman)
7	The Butter Market
8	Church of St Olav
9	The Council House
10	Ship Hotel
11	St Martins Square & St Mary's Almshouses
12	St Mary's Hospital
13	The Corn Exchange
14	Church of St John the Evangelist
15	Church of St Bartholomew
16	Church of St Andrew - Ox Market
17	Church of St Peter the Great
18	Church of St Pancras
19	The Novium
20	The Thatched Barn, The Hornet
21	John Edes House
22	Baffins Hall
23	Church of All Saints & Toc H Meeting House
24	Ruined walls of St Martins Square
25	Pallant House Gallery (Dodo House)
26	Canon Gate, South Street


2


8


26


14


21


25


12


11


13


THE OLD CROSS


Except for
local buses
& access

This page:

Above

- Rear of Buttermarket
- The impact of retail signs and advertising

Below

- First impressions when arriving by train - no view of the city

Opposite page:

Top:

- Diversity of North Street

Bottom:

- South Street with an interesting mix of buildings but a very poor public realm

The buildings in the four main streets are domestic in design. Although they are primarily used as shops, they were developed in various vernacular styles rather than being 'planned' as part of a single co-ordinated design. The diversity of listed buildings, ancient monuments, buildings of 'townscape merit' and modern buildings all make a positive impact on the quality of the City. But whilst the underlying character of the City is 'historic' there is evidence of the inevitable conflict between modern infrastructure and modern retailing, and a desire to preserve the character and historic grain of the city. The need to provide service areas to facilitate deliveries to shops and the creation of central car parks has created gaps in frontages and removed gardens at the rear of some premises.

At street level the visual 'noise' created by shop signs and general street clutter imposes a generic layer on the streetscape that can result in creating 'clone towns' that lack distinction. Although this is partly the result of attracting leading retailers, the impact of generic design interventions, including shops signs and street furniture can detract from the quality of the setting. In addition previous public realm audits have identified that there is extensive damage to street surfaces and that a thorough overhaul is required. Throughout the study area many different materials are used for surfaces including Purbeck limestone and York-stone, concrete slabs and brick paviors.

As Chichester lies on a coastal plain, the most appreciably significant view of the City when approaching is from the north along Broyle Road passing the Festival Theatre. From the A27 to the east and west and further afield it is possible to see the Cathedral spire as a clear marker that Chichester is nearby. Within the City the spire can be seen from many locations, but the quality of the arrival varies considerably depending on whether arriving by road or rail.

The area around the railway station is very poor, confused and with no direct view of the city or indication of where to go. All road routes are dominated by traffic and congestion due to the impact of the gyratory systems, volume of vehicles and the level crossings close to the station. In the 18th century congestion led to the demolition of the city gates. Today there is a similar need to make bold changes to ease congestion, re-establish pedestrian linkages and improve a visitors' first impression when arriving into Chichester.


PEDESTRIANS
push button and wait
for signal opposite


20
ZONE
Controlled
ZONE E
Mon - Sat
9 am - 5.30 pm

Condition

The condition of the City can be considered in terms of buildings and public realm.

The need to overhaul the public realm was noted in the Conservation Area Character Appraisal of 2005, which also noted that a Streetscape Design Manual had been commissioned through Alan Baxter Associates. In addition West Sussex County Council engaged Building Design Partnership to carry out a similar exercise in 2006 resulting in a scheme that has been partially implemented in Eastgate Square with further evidence in North Street where sample sections of paving were placed for wear test and to gain public opinion. Neither schemes were implemented in full, but given the lack of a complete overhaul since both studies were completed, the advice given by these studies is likely to still apply.

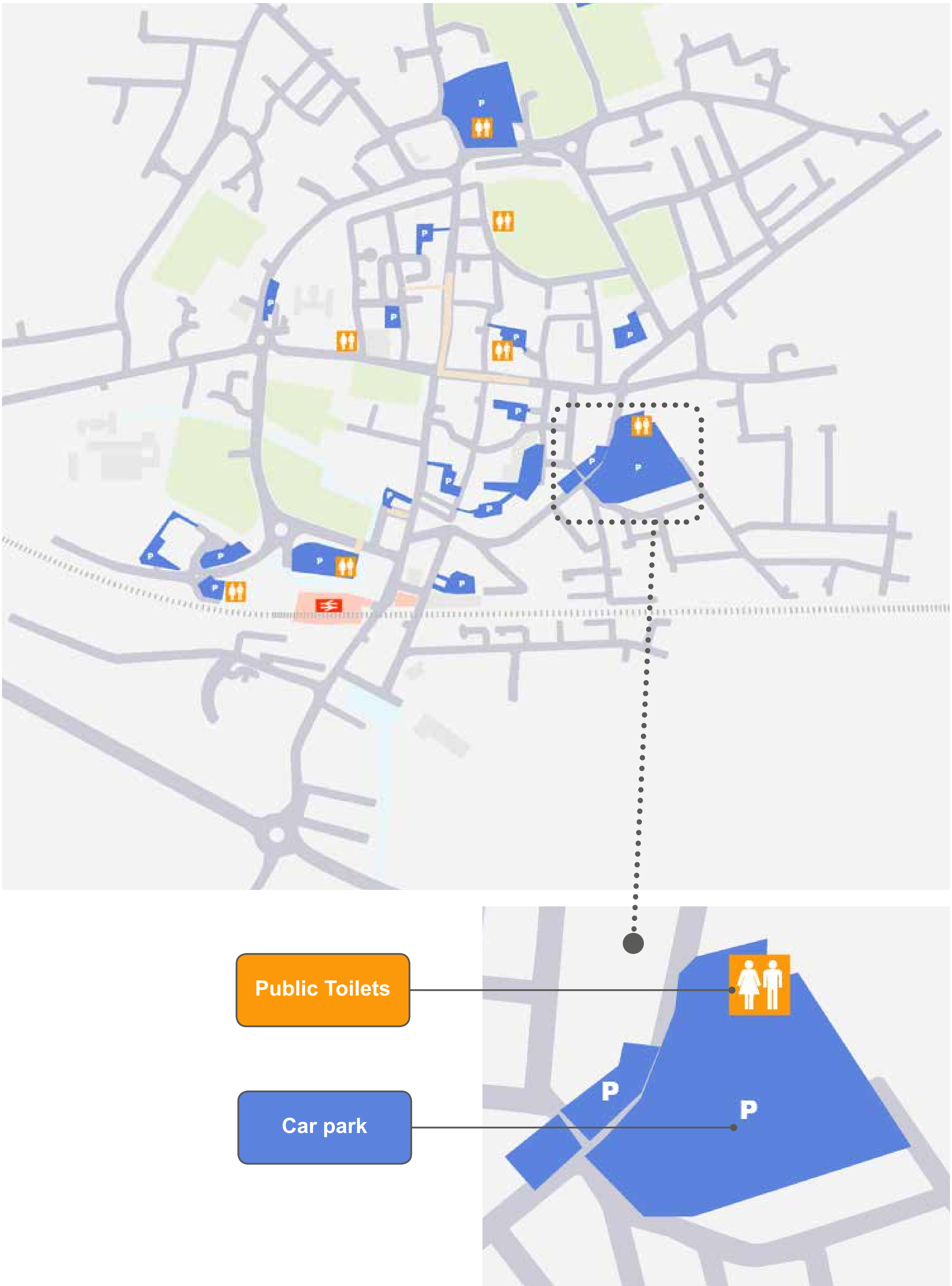
Since then the effect of further remedial work and the repair of below ground services has left the paving in some areas in a disturbed state. In addition, broken and mixed surface material (as noted previously) is evident throughout the study area. Existing street furniture including bicycle stands and benches have continued to deteriorate, and ‘Zone E signs’ signifying the start of the pedestrian zone have been installed. The lack of coordination has meant that the streetscape is cluttered and in places unattractive.

Although the pedestrian area is more accessible due to the lack of kerbs and level changes, where ramps and tactile paving has been used it is difficult to execute well, and in some places has disturbed older authentic paving. Examples of this can be seen at the junction of Canon Lane with South Street and again in South Pallant. Where pavements are narrow, the benefit of ramps has to be questioned as the pavement may be too narrow for a push chair or mobility scooter, therefore rendering the ramp useless, whilst introducing a trip hazard for pedestrians and damaging the paved surface.

It is possible to rationalise the streetscape by removing obstructions and improving the paving and level changes. However, it should be questioned whether the use of traffic calming ramps made of red brick actually work. With that in mind, it is possible to challenge established practice. Where and how street furniture and other amenities are placed in order to reduce obstructions, litter and potential anti-social behaviour should also be considered. In particular, the use of A-boards is a highly contentious issue as businesses may feel they depend on them to attract customers, especially if the business is located in a secondary street such as Crane Street, Cooper Street or Baffins Court. But are ‘A’ boards an effective way of guiding shoppers or are there more effective, less obstructive ways to encourage people to explore the side streets, whilst making the streetscape more presentable?

Opposite page:

- Examples of dilapidations in the streetscape


Public Toilets
Car park
P
P

Amenities

Throughout the City, amenities are provided in the form of car parks, public toilets, benches, waste bins and bicycle stands.

3546 spaces are provided by 14 car parks including one multi-storey and one underground. All but one are run by the local authority and compared to other similar locations, parking charges are low currently between 70p and £1.40 per hour. Parking has been the subject of review over the past few years in terms of provision, usage, charges and location.

Avenue de Chartres multi-storey car park is an award winning design. Built in 1990 it is open sided and airy and includes an integral pedestrian bridge that delivers pedestrians safely into Southgate.

The Little London car park is very popular as it is central and convenient for shops in North and East Street. It occupies a prime location with the ancient hospital building acting as a fine historic backdrop. But access to it is restricted and regularly causes significant tailbacks onto East Street. It is also used to service deliveries to Marks and Spencer.

There are five public toilets in the City all but one are in major car parks including The Cattle Market/Market Avenue, Northgate and Little London. Another is in Priory Park and one is in Tower Street. The WC in Little London is modern and provides unisex cubicles that open directly onto the car park. This configuration is designed to optimise provision across genders and avoids creating enclosed washroom vestibules that can encourage antisocial behaviour. There is a disabled WC and baby changing facities at that location.

Other amenities such as street furniture are present throughout the city. There is no co-ordinated scheme although several attempts have been made in the past ten years to rationalise design. However, at present there are many different styles of bench in use including the ‘Chichester bench’ designed as part of the project undertaken by BDP, which are distributed around the city.

Unfortunately the ‘Chichester’ style bench is no longer available and has proved to require frequent maintenance. A new style bench has recently been introduced by Chichester City Council made of recycled plastic. It is the long term aspiration of the City Council to achieve continuity in the City Centre using this type of bench, but clearly that is some time away and until then a number of different style benches will continue to exist in the City Centre.


chichester

Cycling is a popular means of transport that requires provision of specific amenities such as cycle lanes and cycle racks. The station has installed two areas of stacking racks. They are space efficient, under cover and relatively secure. Within the City Centre, standard steel hoops are provided, some located close to seating. While there is a high demand for cycle parking in the City Centre they also create an obstruction. If the hoop is full then occasionally bicycles are locked to the adjacent bench. However, as Chichester's topography is flat, it is an ideal place to promote cycling. With increased popularity of cycling as a means of commuting, the need for dedicated amenities for cyclists is set to increase, requiring new ways to meet demand.

Separated and general waste bins are provided throughout the City and comprise different designs. Inevitably they require regular emptying and cleaning and can become a source of concern.

Street lighting is generally the responsibility of West Sussex County Council. The current provision was contracted out in 2010 to SEE for a 25 year supply, maintenance and renewal contract. In addition the City Council have assisted the County Council in a city wide lighting survey. Within the City the length of time lighting is on has been the subject of review. Being left on through hours of darkness is thought to reduce street crime. City Centre residents however, have been against this favouring a partial black-out. Recently a scheme has been completed in the Pallants and elsewhere in the City to install 50 wall mounted street lamps that have an historically sensitive design.

Close to main traffic gyratory schemes, railings are provided. While they provide protection to pedestrians they impact the aesthetic quality of the streetscape as they are obtrusive and become dirty and damaged. At the end of East Street a brick and stone block defines the footpath and prevents pedestrians crossing the road at that point. It improves safety and is also used as a seat. It is an effective architectural response.

Amenities and street furniture aim to benefit the public and should enhance the setting or public realm. But all amenities attract a maintenance liability and can deteriorate very quickly through neglect or misuse. This is evident in the city. The position of street furniture and a consistent design language important in unifying the public realm. This approach will create a co-ordinated streetscape free of unnecessary obstructions, thereby improving the setting for other landmarks as well as making it more appealing to users.

Opposite page:
Clockwise from the top:

- Avenue de Chartres car park
- Cars queuing for Little London car park
- Selection of benches

This page:

- South Street new bench with recycled planks next to post

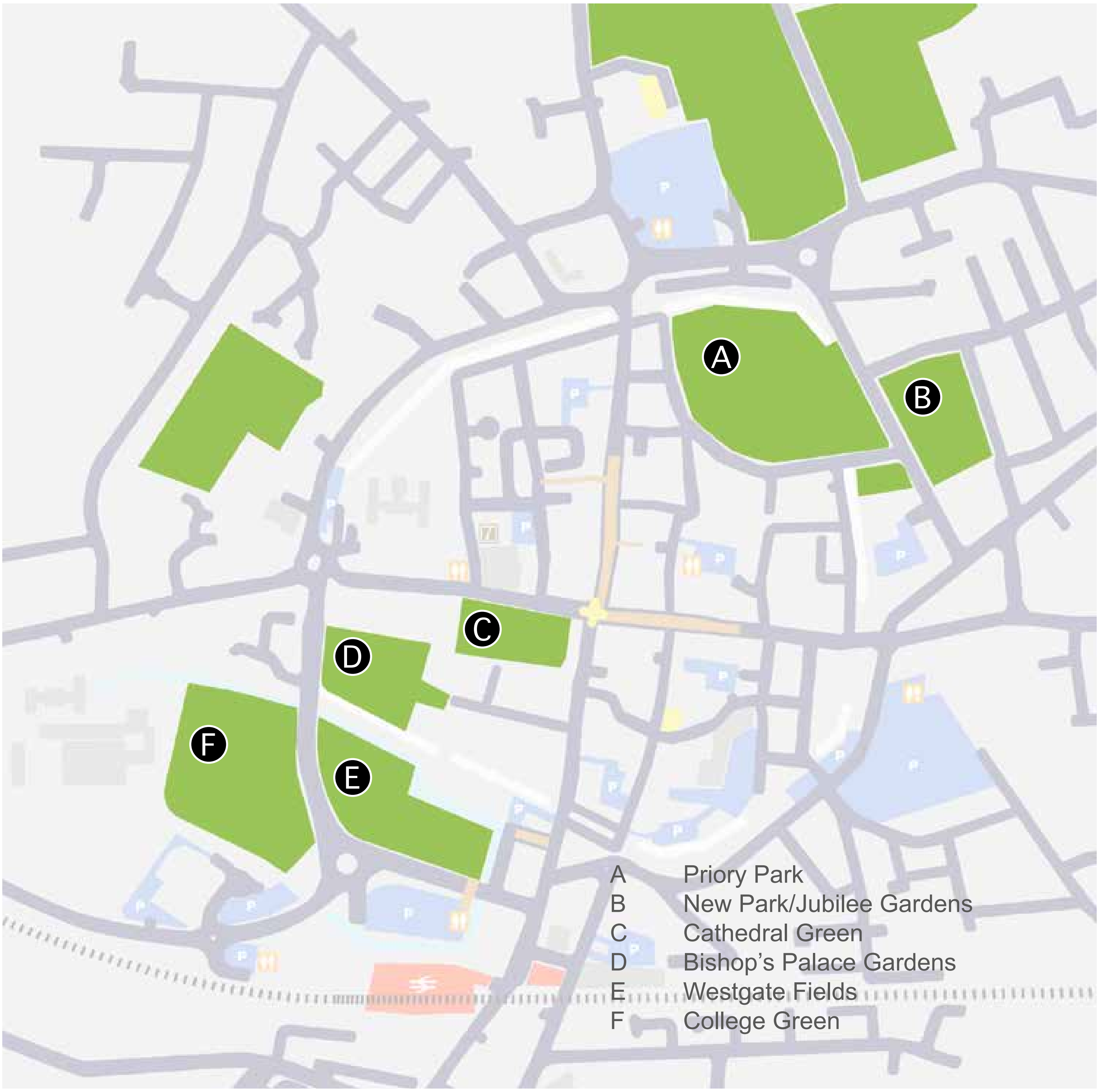
This page:

- Map and segregated refuse bin - East Street
- Cattle Market bus stop and shelter
- Tourist information panel - Northgate car park
- Cattle Market ticket machine and sign
- Public realm around canal basin

Opposite page:

Clockwise from the top:

- Stacking bicycle rack at the railway station
- Bicycle rack in East Street
- Bicycle rack at the library
- Railings at Southgate
- New street lighting in the Pallant
- Brick and stone structure in East Street


A Priory Park
B New Park/Jubilee Gardens
C Cathedral Green
D Bishop’s Palace Gardens
E Westgate Fields
F College Green

Green space and planting

Green spaces make a positive impact on the City with Priory Park, Bishop's Palace Gardens and Cathedral Green providing city centre open spaces. If entering from the A27 west of the City, Westgate Fields and views of the Cathedral create a positive impression of the City as does Jubilee Garden if entering from the east. However, the four main streets in the City Centre are not tree-lined, although the planting of trees is a popular idea and was noted in the Vision produced by the City Council in 2009. It is technically challenging and had been given full consideration as part of the BDP study. At present, trees exist in South Pallant close to Cawley Priory car park, along Jubilee Gardens, on Cathedral Green and along the walls and Oaklands Way.

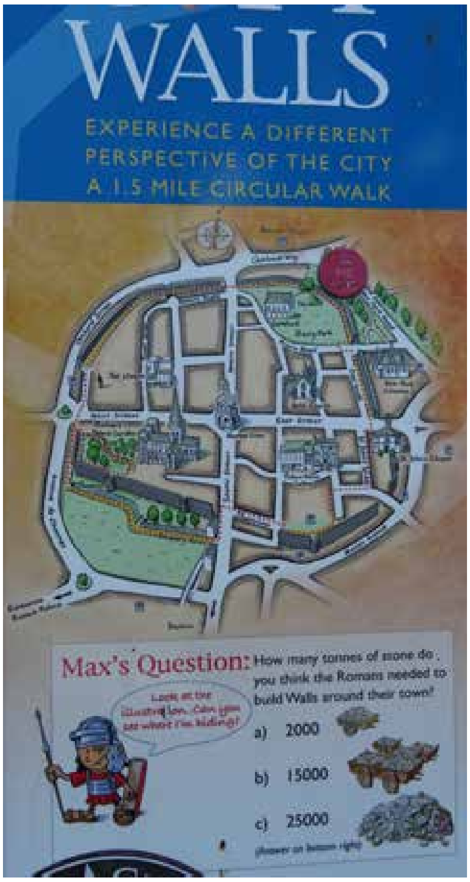
Other low level planting exists around the City although the current planters used are generic and lack design context. The planting is often municipal in style and at times poorly maintained. Planting does not appear to have been considered in terms of the wider streetscape and quality of the public realm.

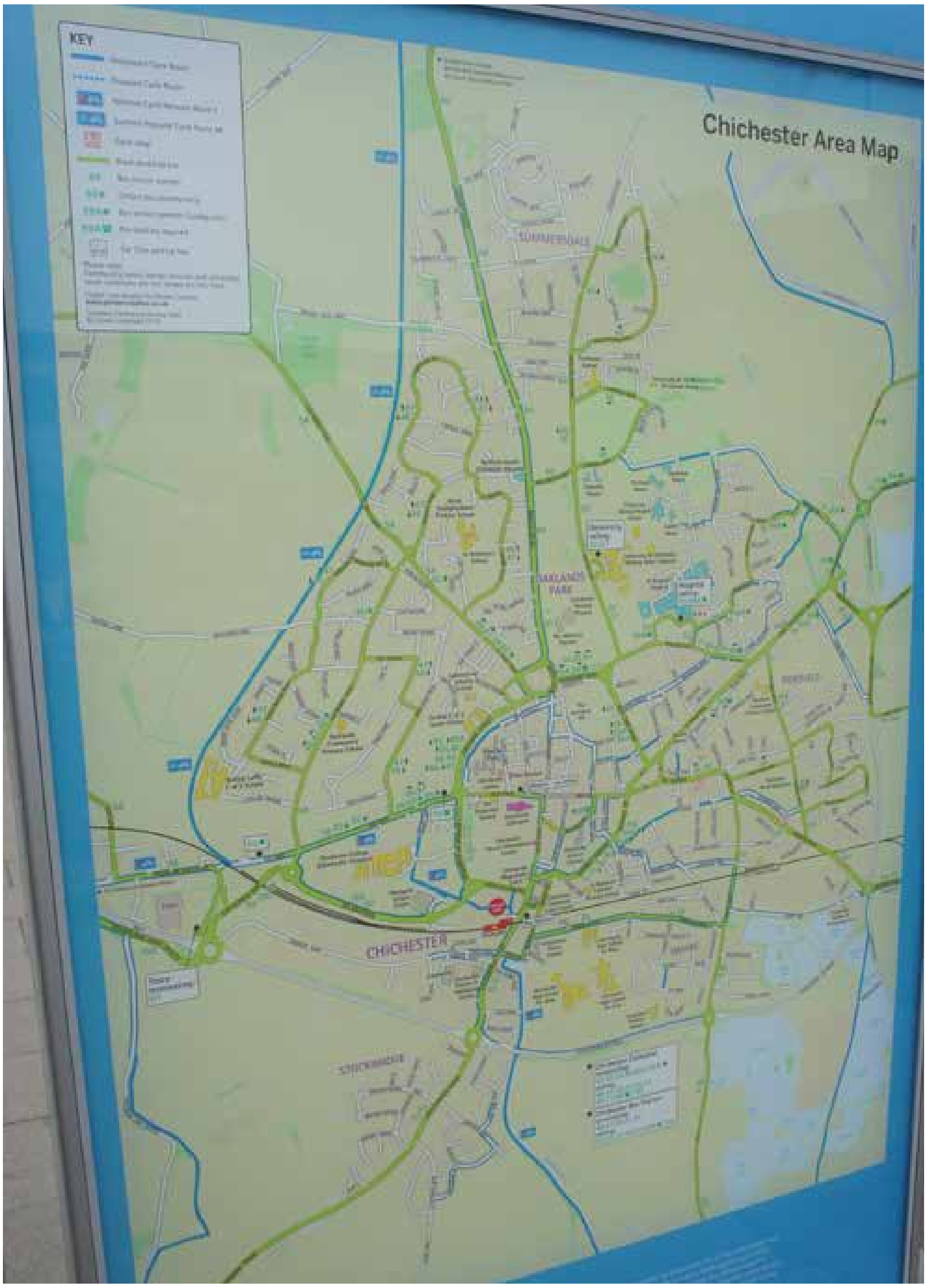
This page:
- The Cathedral from Bishop's Palace Gardens
- Jubilee Gardens

Opposite page:
- Priory Park

Audit

Legibility and permeability





Clockwise - opposite page:
Too many styles of maps used:

- Walls walk map
- Large area map - note poor contrast between colours used
- City map used on reverse side of area map - lack of consistency
- City map at the Cathedral
- Paper version of city map dispensed at car parks

This page:
Multiple signs on same post

Like many other towns, Chichester has a streetscape that is crowded by many different signs and information panels aimed at different users including motorists and pedestrians. Permanent and temporary information often shares the same means of support creating a jumble of conflicting information, lacking coordination or hierarchy.

The combined impact of road planning and the associated traffic signs, coupled with a lack of a coherent and co-ordinated wayfinding programme, means that (to the visitor) Chichester lacks legibility.

Although there is evidence of this throughout the City, starting at the bus and rail stations it is clear that the primary information and guidance required is poorly displayed and potentially missed due to the proliferation of other types of signs. Crucially there is no real sense of arrival and although within the rail station at both north and south exits a ‘welcome to…..’ sign is displayed, physically the immediate environment does not reflect the true character or quality of Chichester and fails to make a good first impression or lead the visitor in the right direction. As the City is flat, topography does not provide a useful view of the City. Furthermore the tourist information centre (or TIC) is located at the Novium. It may be central, but it is not close to the main points of arrival and is not easy to find.

At the railway station pedestrian information exists in the form of one monolith structure on either side of the railway close to the station. Provided by the Business Improvement District (BID) the monolith has a map on one side showing the City Centre with a photographic directory of attractions and landmarks. On the other side of the monolith there is a map of a wider area. It is drawn in a completely different graphic style and uses a mix of colours that lack contrast. Legible user-friendly wayfinding relies on consistency and clarity. Using two styles of map at the same location is inconsistent and the use of shades of light green and yellow lacks contrast and clarity. Therefore they will be hard to read in certain light and for people with some forms of impaired vision. The colours will also fade in direct sunlight.

Although the City Centre map has a higher level of colour contrast and attempts to identify key landmarks, the information content could be improved by including navigational aids as used in wayfinding programmes in other cities such as icons of landmarks placed in situ on the map. As part of the map scheme provided by the BID, dispensers are located at all car parks in the City. They are well positioned and contain a printed version of the City map with a landmark directory. They are useful and well placed.

From the station the Cathedral spire can be seen, but there is no clear view of the City Centre and the immediate environment does not suggest an obvious direction to follow. A first time visitor is therefore entirely dependent on good directional information. But once the tangle of roads and traffic signs has been understood and South Street is reached, then the City begins to reveal itself as a simple compact street plan - largely pedestrianised, that is easy to navigate on foot using the Cathedral spire and Market Cross as two very useful way markers, providing they are recognised by the user.

Throughout the City, maps have been recently replaced by the BID featuring the same City Centre map found at the station and on the printed leaflet. But as noted earlier, this is not the only map used and other styles of map appear on signs placed at the exits to the car parks. In addition the Walls Walk also uses a different style of map. If a fully co-ordinated approach to wayfinding were adopted then it is ideal to combine heritage interpretation signs, directional signage and other information to establish consistency and reduce the number of structures required.

The map content, use of colours and legibility are important, but so too is the location and position of the sign. Generally, the maps are placed in the most useful locations but the orientation of the map can also enhance or confuse the information it is displaying. Adjacent to the Cathedral near the junction with South Street the map uses the convention of north to the top. But the map is displayed on the north side of the panel and so the user is facing the Cathedral. Crucially this reverses the information as it appears. For some this may not be intuitive to understand and interpret directions. This is a common problem with map reading, where the user may rotate the map to match what they see. Digital satellite navigation devices orientate the map in the direction of travel to make the information easier to interpret and apply. It is possible to use the same approach with static maps using a 'heads-up' approach, matching the map to the view. This would however require a dedicated map per location rather than one single map that uses the 'north to top' convention.

A modern wayfinding scheme can be digital and accessed directly from a smartphone or other mobile device. Providing there is good wireless connectivity, digital systems are more dynamic than conventional maps and fingerposts. They can be designed to filter specific information, translate into other languages and meet the needs of different user groups such as the visually impaired.

Throughout the City there are many 'heritage style' finger posts providing directions to pedestrians. This is a generic approach to pedestrian signage and therefore familiar to users. However, the common problem with this type of sign is that they can be made to carry too many fingers making them confusing to read and, as the columns are circular, they allow fingers to point in any direction. Whilst this may be seen as a flexible solution, it also leads to a lack of clarity and the potential for the fingers to be easily moved, so that they point in the wrong direction altogether.

This page:
- Top - Views of the Market Cross make an effective way-marker
- Finger post with too many fingers

The wayfinding system that exists at present has not been developed specifically to make navigating Chichester intuitive by using a combination of passive wayfinding elements - (buildings, street plan, landmarks) as well as active elements - (signs, finger-posts and maps).

The primary navigational aids that exist as a permanent feature of the city include the four main streets, the Cathedral spire, the Market Cross and the city walls. All can play a passive role in making Chichester more legible and permeable. But the combined effect of the road network and volume of through traffic, plus the deteriorated streetscape, makes access difficult in some areas.

The partial pedestrianisation of the centre and how the demise is managed at its ends, leads to confusion and conflict between users. It also means that multiple surface finishes are used that interrupt paving and create level changes.

Crossing the different gyratory systems creates obvious breaks in pedestrian movement. The width, quality and condition of pavements presents challenges for some users. There are a number of points around the City where a simple link has been broken by the existence of road or rail that must be addressed including:

- The Festival Theatre and Northgate Car park
- The Canal Basin and Chichester Gate
- The railway station and South Street
- The Hornet and St Pancras with East Street
- Walking the walls, crossing from East Walls to West Walls over North Street
- Crossing Market Avenue to South Pallant

However, one good example of how design and planning can ease conflict and improve access is the footbridge linking Avenue de Chartres car park with Southgate. Considering the car park is a primary point of entry for those arriving by car, the integral route into the City Centre is safe, accessible and provides good views of the City, the Cathedral and Westgate Field.

Legibility and permeability require a co-ordinated approach and must be user centred.

This page:
- Managing the demise between zones

Audit

Culture - Arts and Heritage

The Pallant House Gallery and Chichester Festival Theatre (CFT), both of which are internationally renowned for their respective buildings and programmes, drive Chichester's cultural arts offer, and the Novium is custodian of the history and heritage of the City and District.

Celebrating modern British art, Pallant House Gallery has a significant permanent collection and curates a range of exhibitions drawing national critical acclaim across the art world. The Festival Theatre is equally celebrated for its winter programme and summer repertoire season giving rise (under its first artistic director – Laurence Olivier in 1962) to the 'Festival' and hence the 'Festival Theatre'.

With its distinctive 1960's Powell and Moya designed building featuring the first 'thrust stage' to be built in England in 500 years, the CFT, like the Pallant House Gallery is not provincial in its ambition and approach, yet values its origins in Chichester, its locality and connection with the community.

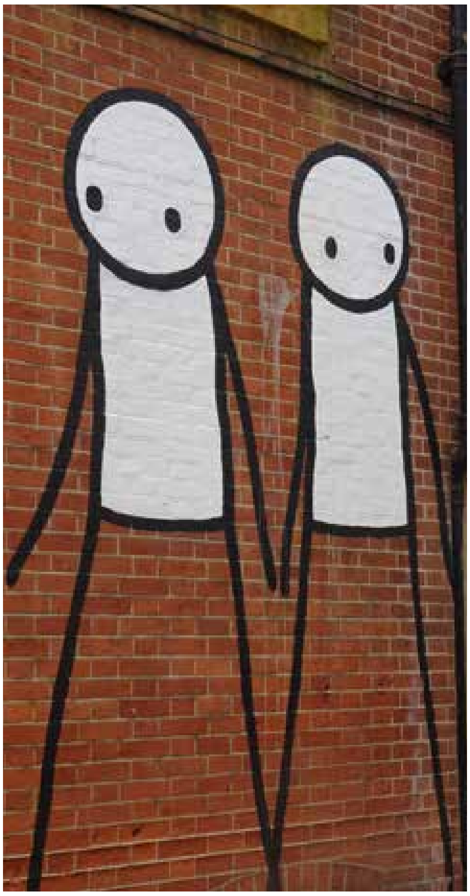
The Pallant House Gallery, run as an independent trust in partnership with Chichester District Council, has a robust and diverse range of income from sponsors, sales revenue and grants. It runs a rich programme of exhibitions that promote high quality modern art and design by establishing strong local context and connections, as in the recent John Piper exhibition - The Fabric of Modernism. The exhibition marked the 50th anniversary of the installation of Piper's celebrated Chichester Cathedral tapestry. This not only celebrated Piper's standing as a significant modern British artist, but also demonstrated the link Piper had with Chichester through the tapestry.

Both the Theatre and Gallery have undergone recent development. Since the completion of the extension in 2006, the standing of the Gallery has increased nationally and visitors have increased from 25,000 per annum to 60,000 in 2015. The extension has therefore had a positive impact, as well as providing a library and extra space for temporary exhibitions. As accessibility and learning are central to the Gallery, it was also possible to include facilities for community engagement projects.

Following a £22m restoration, the Festival Theatre completed its 'Renew' programme of rebuilding and re-opened in July 2014 with a season including performances of Amadeus. The three-year programme was funded through a significant grant from the Arts Council plus funding and donations from local business and local authorities, as well as 12,000 individual donations from the public.

With the work complete, the Theatre has increased its capacity to 1,300 with improved seating and sight lines, improved visitor and back stage facilities and systems to improve energy efficiency.

This was essential work to improve physical infrastructure, but when considering financial sustainability, the quality and creative excellence of programme content is vital as it produces audience appeal. Running successful cultural programmes will inevitably benefit the City economically. Impact studies have been done that show how Chichester directly benefits in two ways from cultural attractions. The first is that people attending events and visiting attractions will also spend in the City. The second is that the profile of Chichester is raised through the media attention created by the Gallery for an exhibition, or by the Theatre for a production.



With the Cathedral in the centre of the City, Chichester has a spiritual and historic landmark that is a keen supporter of the viusal and performing arts. For many years it has encouraged creative talent by enabling and commissioning works. Today, it is a cultural venue as well as a place of worship. In addition to its calendar of religious events and educational programme, the Cathedral develops a rich season of recitals and concerts, installations and exhibitions to connect with a wide community beyond the congregation. The Cathedral is a centre of excellence for music, and with the absence of a concert hall in Chichester, it is the main music venue in the City.

Notwithstanding the high quality of arts in Chichester, it could be said that it is 'supply' rather than 'demand' driven. The main venues or organisations are high quality and well respected and they already collaborate with each other (to some degree) to develop and promote events. However, there lacks a culture and tourism strategy connecting the cultural offer as core components of Chichester as a destination. Uniting the City and cultural sector behind a bid to secure UK City of Culture status would not only be central to the future Vision, but would also be a strategic aim, demanding a programme that would strengthen the cultural offer and improve both the physical and cultural infrastructure of the City.

This Page:
- Street Art
- Festival Theatre

Opposite page:
- Pallant House Gallery extension

In addition to the creative and performing arts, heritage is also central to Chichester. It is an historic Cathedral City benefiting from a physical setting that evidences a rich past preserved in its buildings, street plan and historic landmarks. Street names such as Needlemakers and Woolstaplers, record Chichester's important social history and commercial activity since the 13th century. As custodians of the local museum collection, the Novium Museum adds implicit values to the culture of the City in particular, as well as the District as a whole, serving residents and visitors alike.

Whilst it is generally agreed that arts and culture are vital to one's sense of well being, it is also important to have access to heritage in a way that is authentic and imaginative, and to recognise that heritage is constantly evolving over time. To that end, the work of the Novium Museum is making full use of a valuable publicly owned collection to ensure the stories, artefacts and landmarks that define Chichester are accessible, and that they underpin Chichester's identity. With a collection starting with Boxgrove Man and the Bronze age remains of the Racton Man, through to the forthcoming exhibition to celebrate astronaut Major Tim Peake, the Novium can literally celebrate Chichester "from cave man to space man".

Physically the Novium Museum has no capacity for future expansion, and while it may be effective to place Tourist Information within the museum, the current lack of adequate wayfinding and heritage interpretation within the City, means it is hard to find. The position and design of the building is defined by the Roman ruins that occupy the significant part of the ground floor gallery. However, a dedicated retail space or cafe were not included in the original design. Increasingly, retail spaces have become essential features of heritage attractions as they enhance the visitor experience and generate much needed revenue. The Novium Museum has addressed this by using the entrance space as a shop and by creating an impromptu cafe. However, the result of this is that tables and chairs now occupy the primary view of the ruins.

But the biggest challenge across the arts and cultural sector is establishing financial stability. Since 2014 with the introduction of free entry, visitor numbers have increased to 49,000 per annum. Crucially this unlocks the ability to secure external funding and sponsorship to stage events and initiate out-reach programmes to ensure community-wide engagement and access. Recent changes have led to the Novium Museum and its staff winning awards and nominations. Ultimately success in terms of funding and sector recognition should help secure its future. But independence as a trust, much like the Pallant House Gallery, may be a practical if not inevitable future goal, as well as considering its role in a furture tourism or destination strategy.

Opposite Page:
- The Novium - museum
- Roman Week

This Page:
- Litten Gardens War Memorial
- Walls walk directional way marker
- Various commemorative plaques
- Needlemakers

The City is very compact and flat with attractions in close proximity to one another. This is a great advantage in terms of destination branding and management. But although the Vision is concerned with the City Centre, in terms of cultural tourism visitors may not be so concerned by geographical boundaries. The Vision may therefore wish to consider that visitors may be attracted to the District as a whole, to visit the range of other cultural activities and locations outside of the City Centre.

Whether considering the City or District, local context is important. As Chichester is a market town surrounded by farming and food production, food is an important cultural component. At the time of writing there are 59 eateries in the City, three national food retailers and others of varying size either just outside the City or very close by. A farmer's market is held in North and East Street on the first and third Friday of each month, selling produce from within a 30-mile radius of the City. Seasonal food events also take place at West Dean College and The Weald & Downland Open Air Museum. But unlike other towns such as Whitstable with its Oyster Festival, or closer to home, Emsworth (until recently) with its food festival, in Chichester food is treated as a retailing activity rather than a regional cultural event. This could change, by celebrating regional specialities and Chichester's heritage as a market town that gave rise to local businesses like Shippams.

A policy is required that develops culture, heritage and tourism as a central part of the Vision. A broad approach for the City Centre must also establish links to events and attractions outside the City, and especially with Goodwood. It has been known for a while that the benefits to the City from events at Goodwood are limited. The Festival of Speed, Goodwood Revival and Glorious Goodwood are all world class events attracting thousands of visitors. However, information supplied by the Chichester BID shows that footfall in the City drops by as much as 8% when the events are on. Anecdotally this may be because locals stay away due to the inevitable increase in local traffic. These events provide a ready made opportunity to attract people into the City. The drop in footfall (in association with events at Goodwood), is one example that emphasises the need for greater co-ordination across the broad range of cultural attractions and events close to Chichester City Centre.

The arts and heritage organisations in and around Chichester City are high quality and world class. Events and programmes are developed that attract large audiences as well as international critical acclaim. In doing so they raise the profile of Chichester and impact the City economically. As a result, the return on national and local funding that helps to support Chichester's Gallery, Museum and Theatres is worthwhile. Considering the size of Chichester, the combined output of the main attractions as well as events run by the Goodwood Estate, the Cass Foundation and others help Chichester to culturally 'punch above its weight'. Yet the high profile (created by individual attractions) is underused in terms of the collective marketing of Chichester as a destination. The quality of its street

This Page:

- Shippams clock - local landmark revealing the City's connection with food processing
- Farmers Market

scape and legibility is below expectations and needs to be improved to make the City more accessible to a broader demographic and to support the main attractions by ensuring the spaces in between are attractive and accessible.

To that end, it is vital to improve the type of infrastructure that would enable cultural programmes to flourish. The main deficiency here is a lack of a concert venue. Although both the Theatre and Cathedral have staged music events, neither venue is ideal. Then we must also consider the type of infrastructure that ensures easy access to the cultural events and visitor attractions that take place in Chichester. This could mean better pedestrian links between the Festival Theatre and Northgate, or between the Canal Basin and the City. It might even mean more hotel accommodation and better train services to and from Chichester. This is a particular concern for the Festival Theatre, given their need to frequently accommodate touring companies of artists and technicians for each production they staged and to also enable audiences to be drawn from further afield and stay overnight.

This Page:
- Canal Basin

With regards to the Canal Basin, it is Chichester's historic link with the sea. Opened in 1823, it once formed a transport route between London and Portsmouth as part of the Portsmouth and Arundel Canal. When fully operational, ships of over 100 tons transported coal, wool and gold into the City. Canals declined with the advent of the railway, and so commercial traffic on the canal ended in 1906.

Today the Chichester Ship Canal is run as a charitable trust that is responsible for maintenance and restoration. The Trust also runs a series of boat trips, charters and other activities including canoeing. It is a popular, tranquil waterfront destination, despite being cut off from the City by the railway. To the south the canal provides a pleasant towpath for walkers, as well as being a designated cycle path linking Chichester with places south of the city beyond the A27.

The condition of the canal basin and activities run by the Trust is a good example of how volunteer organisations can sustain attractions and amenities that may otherwise struggle to survive, if run on an entirely commercial basis. But despite its growing popularity with visitors, the presence of a canal may be unknown to many who use and visit Chichester. There is a need and an opportunity to improve physical links with the rest of the City. The Southern Gateway Masterplan should exploit this opportunity without compromising the dedicated work of the charitable trust.

Overall, Chichester has great potential to improve and add to the rich mix of heritage and culture it has today. Thanks to the individual work of the main attractions it also has the makings of a great profile. But Chichester fails to completely leverage this potential and profile, and does not provide the physical environment in all areas to match. A potential bid to secure UK City of Culture status, would require the impetus to unite Chichester's cultural ambitions.

Audit

Business and Commerce

Scope

This audit is restricted in its geographic scope to the primary retail and commercial centre i.e. North, South, East and West streets plus the secondary streets, St Pancras, Hornet etc. This is principally the area defined by the BID (Business Improvement District).

Sectors

In order to give a broad impression of the current commercial feel of Chichester City Centre, three sectors have been identified; retail, eateries and commercial/professional (a sector which includes business to business providers).

The approach has been to differentiate between those businesses operating as chains or multiples on a national level whose control is outside Chichester and those local, independent businesses that might be said to contribute to the special nature of the City Centre.

Excluded are local government locations and services as well as the courts, other government offices, the Cathedral, the Theatre, Pallant House Gallery and the Novium. District and County Council provides the single largest form of employment and occupy the single largest commercial premises.

Method

The principal business information data was provided by the BID, a partner in the Vision. To this was added a physical walkabout to confirm current data and resolve any anomalies such as vacant premises and changes of use. This physical data largely confirmed the BID data along with some additional desktop research.

Definition and qualification

The audit looked at business activity rather than the number of business premises e.g. some commercial properties are multi-tenanted. On the other hand BID data identifies individual rateable property including car parking spaces, as individual entries or hereditaments, and these were excluded. In all, a sample of 444 businesses were subjected to closer analysis. Every effort has been made to test the available information to produce a result that can inform Vision work accurately at this stage of the programme.

Results

Retail = 269 (61%)	55% Multiples	38% Independent	7% Charity Shops
Eateries = 59 (13%)	45% Multiples	55% Independent	
Commerical Businesses = 116 (26%)	26% Multiples	74% Independent	

Behind the results

There are few surprises in the retail sector, the multiple retailers dominate the primary high occupancy-cost areas spreading out from the Cross, independent retailers are clustered in the secondary areas. The Hornet and St Pancras area contains mostly micro niche businesses. There is certainly a cloning effect in the centre due to the presence of national retail chain stores. However, the impact is disguised to a degree, as shop fronts are varied and modern parades of shops have been discouraged through the planning process.

Changes to the high street over the past few years have impacted on the Chichester independent food provision sector severely. Where once there were butchers, bakers, a fishmongers, game shop and greengrocers, these have been whittled down over recent years and latterly there has been a failed bakery and delicatessen. Public sector intervention attempts at the Buttermarket and at the former Tourist Information Centre have failed as market forces have prevailed.

But recent years have seen a significant rise in the number of eateries; Chichester has become a target for a number of major chains. Surprisingly, given the population profile, there is no fine dining establishment in the centre. The number of independent eateries slightly exceeds the multiples.

The commercial and professional sector lends itself to further sub divisions. There are 11 banks, all the major banks are represented including a smaller foreign bank. There are 18 estate agents, some of which are recent breakaways from established firms. There are 14 financial/wealth consultancies, some are branches of national organisations that have chosen to base an operation in the City. There are 7 firms under a general heading of construction/planning consultants. There are 11 solicitors firms and a barristers chambers in the City, but there is some concern that if the courts close, the number of law firms may decline as a result.

There are some 12 businesses in the creative sector, in the fields of design, digital, marketing and publishing. Some years ago when ‘design’ was seen to have potential for growth a concerted effort was made to develop the sector. It showed that there are many creative businesses and high profile people within the District, but typically the creative sector is dominated by SME’s. It is known that within the Chichester District many creative professionals work from home and collaborate via the internet with other freelance professionals on a project by project basis. Therefore these types of businesses are not very visible and have no real physical presence within the City. It is difficult to know therefore whether this sector is growing, declining or remaining static.

In the past, Chichester saw itself as a centre for, amongst other professions, accountants and architects. Current evidence suggests there has been some change. There are now only 2 accountants remaining in the BID area and only 1 significant architectural practice. The greater Chichester area still hosts 11 accountants and 11 architectural practices, a significant number. Anecdotally it appears a lack of suitable car parking provision and suitable office accommodation to support expansion is a contributory factor to this drift to the periphery.

Similarly, CCCI membership in the area under review has fallen dramatically in the last few years to a level where Chichester City Centre membership is only 22% of the total membership. Indeed, there are only 4 members in the retail sector all of whom are independents. There are no members in the eateries sector. There are 25 in the commercial sector of which 22 are independents. There is a belief that the decline coincides with the advent of the BID.

Enterprise and Entrepreneurship

There is evidence that Chichester is rich in business start-ups and has been for some years. It is above average for West Sussex and the South East. The commercial sector is well represented, which includes banks as well as the professions such as accountants, solicitors, architects, other creative businesses and estate agents. In property terms the sector is, in the main, well served in serviced office accommodation from Metro House and Forum House through to a number of other landlord managed locations spread around the centre.

There is also an active market in shared office accommodation, ‘rented desk’ space, for those ‘in the know’. Attempts have been made in the past to bring cohesion to this ‘hidden sector’ by bringing property owners and potential tenants together, but with little success.

General feedback acquired at one-to-one meetings, membership organisations and a large focus group, is that Chichester is considered a good place to visit, live and work. This helps to retain staff and there is an overall wish to maintain the quality of the environment. High housing costs have an impact on the filling of junior grade jobs but this is not an issue with qualified staff who command higher salaries.

Some professions, notably accountants and architects, have moved out of the City due to traffic congestion and car parking charges suffered by clients and staff alike, as well as finding suitable office space. However, there is some recent evidence of new business start-ups in the professional sector returning to the City Centre.

This Page:
- Drapers yard - pop-up retail
- TK Max in former Sadlers Walk

The BID Annual Review 2015 confirmed that retail and eateries form the bulk of City Centre businesses. Flude Commercial reports that Chichester has a finite stock of retail units and because of limited development opportunities in the City Centre its compact nature means the demand for shops has remained fairly constant. At the time of the report (April 2016) the vacancy rate of retail in the City Centre was 1%, well below the national rate of 10.5%. 'Over 30% of completed (rental) transactions involved a retailer relocating within Chichester.' This situation remained the case until the start of the EU Referendum campaign when economic uncertainty began to take hold. Following the result there is early evidence that investors are holding back and the period of uncertainty is expected to continue.

However, the retail sector is relatively poorly provided for in the 'start-up' category even more so since the change of use at the Boardwalk and the alterations to Little London Walk, formerly Sadlers Walk. Fludes do report that these changes also had a positive effect on the City Centre in that some occupants at these locations were able to relocate to existing vacant premises in more prime locations.

There has been an attempt to provide stalls in St Martins Lane, but nothing is operating yet. Interventions have been made in the past to stimulate start-ups in the industrial sector particularly at St James Industrial Estate; ways to stimulate and support the fragile independent retail sector would have a positive impact on the character of the retail centre.

Drapers Yard in the Hornet is an example of the private sector attempting to meet this demand and shows what can be done by an imaginative and determined individual in exploiting a business opportunity.

Commercial property agents tell us that maintaining our position as a lifestyle City supported by high-end employers carries a challenge to the City in maintaining a steady supply of commercial property. The supply needs to support all stages of business growth from renting desk space, through serviced offices to modern premises for 50+ employees, with the necessary technology and connectivity to compete with other cities. Once established, businesses need to know that they can expand further in the locality. The uncertainty engendered by possible relocation is not conducive to good employee relations, business stability and growth.

The so called 'CEO lifestyle' is one that Chichester, by its geographical location and cultural offer is well placed to deliver. Active steps could be taken to market the City to business leaders who already visit .

Attracting larger multiple branded retailers has long challenged Chichester City Centre due to the small retail premises and the proliferation of listed buildings. M&S operate over two sites as does Next. There is a perception in some circles that there has long existed a planning presumption against larger units or malls as this would significantly alter the character of the City Centre.

There is continuing pressure from some multiples to establish a presence at outer-city retail sites. Although there are genuine concerns that edge of town retail parks can adversely affect town centres, with regards to Chichester, out of town retailing does provide the shopper with greater choice, retailers with more efficient stores and help to preserve the character of the City Centre. The challenge is to ensure existing retailers remain where possible and new businesses move in when premises become vacant. This may mean that financial support is given through grants as well as small business rate relief to support the independent sector or encourage non-retail businesses into the centre. To that end, Chichester seems to value its mix of multiples and independent retail outlets. Younger shoppers relate to 'brands' and mature shoppers look for more 'niche' retail experiences.

All of the above requires some active intervention. Recent loss of retail and other commercial use to residential development has a negative impact on maintaining the City as a thriving commercial centre for a diverse spread of independent retail and professional businesses. Interventions are usually led by local government but work better in partnership with the private sector.

Audit

Population

Chichester City
In Chichester City the population is 26,795, just over 1 in 5 (5885) of these are over 65 which equates to 22.0%. The predominate ethnic group within the City is White British at 88.8%, with almost 7 out of 10 people being economically active (68.7%). There are 3,029 full time students in the City, which equates to 48.3% of the entire full time student population of Chichester District. Generally, Chichester District has the highest number of students in whole of West Sussex.

The study area
Within the study area however, the statistics are estimates derived from eleven output areas; these are the lowest form of geographical boundaries that Census 2011 data captures. The boundaries do not cover the study area exactly but provide a good level of insight nonetheless. The study area replicates Chichester City with a trend of high density of people aged over 65, with 28.4%. Fewer people in the study area are economically active compared to Chichester City as a percentage with 47.9% and student numbers are also lower as a percentage. However, there are some areas with significant differences and fluctuations. For example student density is almost 6 out of 10 (57.4%) in the north east area close to the university campus, compared to 2.2% in the south east area south of Market Avenue. Ethnicity is another theme that compares very similarly to Chichester City with 86.3% of residents classing themselves as White British.

General
In terms of employment, the Ward Profile compiled from the 2011 UK Census by West Sussex County Council, shows that Chichester District has the highest number of self employed in West Sussex at 14.5% and that overall around 59% of the workforce are either professionals, managerial or skilled, some of these people working in the study area.

It is difficult to precisely apply the same data to the study area, but reasonable to assume that the City is a reflection of the District. An estimate based on an area approximate to the study area concludes there are 2,139 dwellings with a population of 3,730.

Residents are widely distributed through the study area although the northwest quarter has the greater concentration with other residential areas existing just outside the walls to the east close to the University and Hospital, and then extending from the Hornet to the A27.

Within the City student accommodation is provided on campus at the university complex (reflected in the figures stated earlier) and within halls south of Chichester gate. Other students are distributed in private rental properties. But student retention is very low, recent figures suggesting that 100% of graduates have left the City within two years of graduating.

Apart from space within the area covered by Southern Gateway Master Plan, there is little scope for new residential properties to be developed within the City unless vacant space above retail premises is converted. However, in the past ten years there have been new homes built as part of the redevelopment of the Shippams factory site on East Street, within the wider Eastgate Square and New Park Road development, as well as other isolated developments such as the Print works in St Johns Street and around the canal basin.

The largest impact on local population is the result of two extensive developments close to the City to the north, including the former Roussillon Barracks and the site of the former Graylingwell Hospital. So far 400 homes have been built and occupied at Graylingwell, but when complete will total 800, including 40% affordable (to buy) housing, 20% affordable (to rent) housing and 20% shared-ownership.

As a city, Chichester supports the hinterland, drawing in people for work, shopping and leisure from communities across the District and neighbouring counties. The City provides a mix of employment including local government, professional services, retail and leisure, providing jobs for the population along the south coast and further afield. According to data collected by Noggin, for a day in June 2016, 46,000 people came into the City Centre, and given its position relative to the coast, there are seasonal variations of tourists, holiday makers and second home owners to consider as the population that use Chichester City Centre.

The footfall camera that records the daily number of people using the City, shows that when Goodwood host events, footfall in the City drops. Anecdotally, this may be because local people avoid the City due to the increase in traffic. But interestingly, an event at Goodwood does not increase City Centre activity, resulting in a fall of 8% when the Festival of Speed and the Revival are on and 3% when Glorious Goodwood is on. However, conversely City Centre markets such as the bi-monthly Farmer’s market increases the footfall by 11% and 17% during the Garden Market.

Chichester is not entirely unique in terms of activity relative to population, but is unique in terms of size and character. Knowing how retail activity may change or whether non-retail businesses choose to remain in the City will bring about new opportunities. Increased City Centre living may be one way to respond to change and to re-utilize existing buildings, rather than always resorting to building new homes on areas that increase the urbanisation of the surrounding rural and coastal districts.

Audit

Conclusion

Chichester is fortunate to be located in a great position between the South Downs National Park to the north and the coast to the south. Whilst the on-going issues related to the A27 may compromise links with road traffic, Chichester has rail links with London, Gatwick and the rest of the UK and ferry links to the continent through Portsmouth and Southampton. It has a wealth of distinctive architecture and heritage attractions within the City and it has a strong local economy.

Although the Vision is looking towards the next 20 years, the audit has captured the condition of the City in 2016 and has identified a range of issues to address. So without pre-empting the proposals the Vision will recommend, the audit concludes that the following topics need consideration:

- **The Southern Gateway and transport hubs** - this area of the City is run down, dominated by traffic and creates a poor first impression on arrival.

- **The north and south gyratory schemes and general traffic planning** - due to traffic and general traffic planning, parts of the City are disconnected and at times very congested.

- **The streetscape** - a general overhaul and rationalisation of the public realm would be beneficial to reduce street clutter, improve amenities and paved areas and extend the pedestrian zone.

- **Permeable City** - improve linkages between the City Centre and public transport hubs, the Festival Theatre, the Canal Basin and the Hornet. Take a broad approach to improving access in the main streets and side streets. Integrate cycling and access for cyclist as a viable means of transport. Manage potential conflict between different groups of users.

- **Legible City** - undertake a strategic project to develop an integrated wayfinding scheme that supports permeability and improves legibility and heritage interpretation, as well as reduce street clutter by rationalising the use of signs.

- **Green City** - find opportunities to increase City Centre green and open public spaces and improve the planting of flowers, shrubs and trees in consideration of the architectural context. Consider the green city in terms of environmental sustainability to improve air quality in the City and promote better energy efficiency in the street scape and among businesses.

- **Waterfront and canal strategy** - recognise the heritage and leisure importance of the canal as a a waterfront and a defining element of Chichester's sense of place. Develop a strategy that will connect it to the City Centre as a valuable amenity. To secure its future, build on the work of the volunteers who have restored the basin and developed it as a popular tourist attraction. Explore the possibility of completing the restoration to make it fully navigable, so that services could run from the City to the sea.

- **Cultural strategy** - enhance existing cultural assets and capability through a cultural strategy. Aim to provide a comprehensive programme that works to leverage existing resources and develop new infrastructure. Promote financial sustainability that makes efficient use of a mixture of revenue including sponsorship, donations, grants and retailing. As a strategic goal, aim to bid for future UK City of Culture staus (probably 2026).

- **Destination strategy** - closely linked to the cultural strategy, develop an approach that works towards building Chichester's identity and profile as a well managed and well promoted cultural destination.

The audit has observed and documented the condition of the city and summarised the above topics as priorities. It is known that master-planning is due to take place for the Southern Gateway and that an application has been made for funding as part of a commitment by Chichester District Council to regenerate this part of Chichester. West Sussex County Council have also completed a study into the traffic problems Chichester faces.

If both initiatives mentioned above were implemented a significant step towards addressing many of the issues identified in this Audit would be achieved. In addition, a number of the same issues were raised in the Vision produced by the City Council in 2009 and again during participation events held in March 2016 involving partners of the Vision process, local interest groups and local businesses. The Audit will therefore not be a surprise to those who know and use the City. Conducted at this time as part of the Vision process, it is hoped the Audit will both inform and validate future proposals.

Appendix 1

Observation notes

The station to the Novium

- Less than welcoming environment .
- Dominated by taxi rank, bike rack and smokers.
- No welcome sign or clear indication of where the town centre is?
- Other amenities include post box and ATM with associated graphics.
- General car park environment is cluttered and creates a poor first impression.
- A jumble of signs – a mixture of directional and general information signs plus additional graphics for businesses sited in the car park as well as road markings, cycle path etc. How effective are they?
- General information confusion so that the benefit to pedestrians of the route into town designated cycle path is lost.
- External condition of station poorly maintained and cleaned. Litter and general detritus is a problem.
- Whilst cycle rack is a useful amenity and a good use of space it is neglected. Theft is an issue.
- Map – is a recent addition but it is in the wrong place and graphically is not very legible using colours on the smaller scale map that are chromatically too similar and therefore provide very little contrast for the visually impaired.
- The information content is biased towards the position of retailers and generally doubtful.
- From the south side exit the vista is better, but it is not immediately clear where to go and where the city centre is – although signage inside the station is clearer.
- The exterior is grubby and tatty, with various applied signs. Although the bench and tree surround is an attempt to improve the environment there are signs of dilapidations. But the biggest problem is the barrier and foot bridge.
- Views from the footbridge shows a very low quality environment including the bus station to the east and the car park to the west. It further contributes to a poor first impression.
- The presentation of the retailers in the bus garage is very dominant and low quality with KFC sponsorship of the phone box being very dominant.
- The entrance to the station car park on the north side is a confused environment for pedestrians. This is due to the proximity of the level crossing, the way cars approach at speed (not wishing to get caught by the crossing barrier). In addition, a general conflict between different users and a presumed priority for vehicles over other road uses. The sign information is confusing with the finger post lacking clarity.
- Moving north past the Foundry pub, pedestrian access is acceptable with a relatively wide pavement in reasonable condition.
- Further signs aimed at cyclist, but the cycle path ends very abruptly.
- The area has a general low quality feel despite the listed court room building and is evident in the condition of control box for the pelican crossing and barriers on the corner outside the job centre.
- Further confusing signs outside the court and at the junction of Avenue de Chartres and South Street.
- Conflicting use of signs for the Pallant Gallery exhibition, with no follow through also sign for city centre hotels is misleading.
- Entering South Street pavements narrow significantly and highway and walkway surfaces show signs of dilapidation with different paving used in small area.
- The band of red brick on the highway signifies the 20 mph zone ‘E’ displayed on a post with a ‘gothic arch’ style support – how clear is this? But the many surfaces-finishes and poor condition detract overall from the quality of the built environment.
- The affect of traffic, narrow pavements, and a confusing array of traffic detracts from the underlying nature of first section of South Street.
- The finger post at the entrance to South Street is ambiguous.
- Is it necessary to permit traffic to enter Old Market Avenue?

- Deanery Farm Lane is generally poor and uninteresting, whilst Cathedral Courtyard provides a small enclave of independent retailers and the Fountain pub with outdoor seating.
- Generally however, South Street has promise with a mix of different types of retailers and an interesting mix of building styles.
- Moving north along South Street the pavement finishes become patchy – possible due to freehold issues as pavement lights suggest there are basements that extend beyond the building demise.
- In addition to general street cleaning and building maintenance issues the impact of the smoking ban has created a problem outdoors with waste bins used specifically for smokers becoming an area of associated debris.
- Looking above shop front level some buildings are not well maintained – (Entertainment Exchange), plus there are three charity shops in close proximety.
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- Looking above shop front level some buildings are not well maintained – (Entertainment Exchange), plus there are three charity shops in close proximity.
- Although there is a lack of consistent and useful pedestrian signage, given that South Street is straight with a clear view of the Cross – one of the most characteristic buildings in the City, the clear vista is not used to guide visitors and the pedestrian signs that are present simply confuse.
- In the centre section of South Street the highway needs repair although the pavements are in reasonable condition with traditional well worn paving.
- The entrance to Canon Lane features a stone arch that forms an entrance to the Cathedral Cloisters. The signage is well designed and is a well-considered mix of contemporary and ecclesiastical, but there seems to be a random use of tactile paving that has a 'municipal' appearance.
- At the junction of South Street with West Pallant and again with Cooper Street the red brick pavers signify the start of the pedestrian zone.
- Again there is a proliferation of signage and street clutter that needs to be rationalised.
- The planters are poorly maintained and the design of the box is generic and lacks context.
- The surfaces north of Cooper Street are in reasonable condition and good well worn traditional stone slabs.
- The highway adjacent to the Cross at the corner of South and West Streets, presents a confusing situation as the surface is red – which may be understood to be for pedestrian priority, yet it is a busy bus route and used by delivery vehicles to service the businesses. Given the physical limitations, the conflict between different users and the proximity to the Cathedral, should this area be pedestrianized?
- At the Cross there is a lack of information to indicate the direction of the Novium. A fingerpost close to the Cathedral signs the Novium, but again the information whilst accurate is confusing. One finger is broken.
- The map in front of the Cathedral uses the convention of north to top, but is facing in the opposite direction so could cause confusion.
- The north side of West Street has an impressive selection of buildings used as a department store, bar, post office and other retail.
- Opposite the House of Fraser Store there is the first brown sign indicating the Novium.
- With the Cathedral and impressive façade opposite and the Market Cross at the end of the road, West Street is an attractive street.
- The first brown sign is at junction of Tower Street, which leads to the Novium. It is narrow with narrow pavements yet used by buses.
- On arriving at the 'Novium' the word museum has been added – for clarity.
- Imposing modern building but with a cluttered entrance.

Avenue de Chartres car park to the Pallant House Gallery

- Avenue de Chartres Car park is a distinctive award winning building, and (as far as a car park can) creates a good first impression.
- Exiting the car park on foot on the first floor connects directly to a pedestrian bridge that allows safe passage to Southgate affording views of the Cathedral, Bishops Palace Gardens and the playing fields.
- The bridge acts as a very simple ‘passive’ way finding element leading the visitor to naturally follow reducing the need for signage.
- The immediate vistas along the foot bridge westwards are generally attractive and create a good first impression.
- There are also several map dispensers funded through the Business Improvement District (BID).
- The pedestrian bridge descends via a ramp to the South Gate Car Park – (privately run) complete with the small ‘pavilion’ style retail unit used as a sandwich shop.
- The car park is generally well kept and the road leading to it is well planted and generally acceptable – despite being the rear access for the shops on South Street.
- There is a very clear simple sign at the end of the bridge ramp directing pedestrians towards the city centre and another large map close by.
- However, at this point it is unclear which way to go. There is no indication that the Southgate ‘precinct’ is just beyond the car park and the natural route to follow is Deanery Farm Lane to South Street, which is not very attractive.
- Entering South Street and looking for a clear direction to the Pallant Gallery, there is a jumble of signs at the corner with Old Market Avenue –a blue sign displays Festival Theatre and Chichester University to the right. The 20 MPH Zone E sign obscures the finger post, which lacks clarity and with no mention of the Pallant House Gallery. This is a very untidy location.
- The obvious route to follow (although not clear) is Old Market Avenue.
- The pavements and highway are narrow and it does not feel entirely safe for pedestrians. Traffic should be more aware of pedestrians forced to use the highway.
- At the end the road bears left following a very tight obscured corner. The road surface and tree planter are damaged and the pavement reduces further to a kerb!
- Crossing the road to the east side of South Pallant is the entrance to Cawley Priory Car park. The Car Park signage is good and clear forming part of the BDP street scape study conducted in 2005. However, the map on the car park sign is very small and the ‘you are here’ marker is in the wrong position. The finger post nearby indicates the direction of the Pallant House Gallery but shows the two conflicting directions to reach the ‘Pallants’.
- Moving north along South Pallant a good view of the Cathedral spire can be seen across South Pallant car park. Along South Pallant the pavement changes width and rises on the eastern side. Along past the Masonic Hall the paving varies and the stone used is prone to becoming slippery when wet. At the junction with East Pallant the road and pavement need repair and the use of a small ramp section, tactile paving and a mix of material is untidy and may be difficult to negotiate. Paving outside of the Pallant Gallery is broken and slippery.

Northgate car park/Festival Theatre to the Market Cross

- General environment within the car park is good although difficult for pedestrians for pedestrians to move due to moving vehicles and lack of designated pedestrian zones.
- There is a BID map at the pedestrian exit.
- Attached to the side of the WC building is a blue sign giving directions to City Centre via subway.
- Help point mounted to WC – not sure who runs this service and whether it works, how often is it used?
- View of the Cathedral is a familiar indicator and positional guide.
- Map and 'welcome to Chichester' displaying the Novium but map is very small and Festival Theatre car park is not on it.
- Entrance to the underpass is acceptable, views across road to Northgate are encouraging.
- Underpass is graffiti free, well lit and clean and in reasonable state of repair – as underpasses go it is good although one passer by did suggest it could be 'livened up' – she was smiling as she said it.
- Metro House is very tired and isolated from the rest of the town as it forms the centre of a traffic island.
- South towards the City Centre the primary views of North Gate are good with impressive classic buildings on both sides of the road.
- The Boardwalk shopping arcade is almost empty – awaiting redevelopment and so detracts from the generally pleasant surroundings.
- Close to the entrance to the underpass is another map.
- Start of retail area and running towards pedestrian precinct.
- No clear direction of where to go apart from blue sign noting 'Pedestrian precinct'.
- Highway features short section of cycle path with green surface.
- Moving south towards North Walls/Priory Lane, closed and boarded Board Walk is very dominant. Finger post shows directions for Pallant House Gallery directing towards Priory Park and St Martins Lane.
- Signs for Zone 'E' starts. Guildhall Street – is one-way.
- Fingerpost opposite Crane Street – first since Northgate, plus benches and bicycle rack – old style could be replaced with 'Chichester bench'.
- Entrance to Crane Street now features new Crane structure (developed by the BID in support of local traders) opposite Sussex House with mural.
- Although the lower part of South Street continues to feature many distinctive buildings including the Meeting Rooms and Butter Market, and despite being pedestrianised has many different surfaces and drainage gulleys that denote actual freehold of buildings. Close to the Crooked S the trial paving area installed in 2006/2007 as part of the BDP Streetscape project adds to the lack of consistent surface, with the redbrick finishing close to the Market Cross.

Cattle Market car park to the Cathedral

- Market Car Park pay machine – BID Map dispenser (currently empty).
- Market Car Park, no safe exit for pedestrians.
- Cathedral visible from the car park.
- Brick flooring is in general good condition. The limited pavements have kerbs which could be difficult for wheelchair access.
- Market Car Park main exit. Novium promotional sign including Tourist Information.
- Market Car Park Office at the main car park exit adds character but is in disrepair.
- Pavement outside main car park exit is wide, in general good repair but patched.
- Pedestrian exit at north of car park includes the bus stop, telephone box and Council sign, pavement is new and in excellent condition on all corners of the junction.
- Brown tourist sign on south pavement of East Street, shows image of a bed, has no meaning.
- BID map located on the south pavement at the end of East St, positioned directly behind a bin, is orientated incorrectly. Shows a clear straight line between East Street and the Cathedral.
- Contemporary bench seating, in good condition.
- High quality flooring stops and acceptable, repaired, flooring returns.
- Sign for cycling and the train station, points cyclists towards the no-cycling pedestrian pavement and in an illogical direction for the station.
- Section of East Street between East Walls and Baffins Lane is disjointed from the higher quality feel of the East St/St Pancras and The Hornet junction and the pedestrian part of East Street.
- Church sign and Friary sign includes Parking directions.
- Little London Car Park traffic congestion.
- Disabled parking zone west of Baffins Lane and Little London is disjointed and causes narrow pavements.
- Finger sign does not include the Cathedral but the Cathedral is partially visible at this point.
- Start of the pedestrian paving on East St. Uneven flooring including sunken drain.
- Seating/bike racks/no entry signs – obstructs the view down East St, encourages groups of smokers.
- East Street pedestrian zone is wide and inviting.
- Pedestrian paving includes excessive numbers of access points to drainage and services.
- The thriving Farmers Market is an active part of the community.
- Finger sign at the East St and North Pallant junction includes Pallant House Gallery but not the Cathedral, although the Cathedral is partially in view.
- East Street planting is very poorly kept and the planters have no relevance to the city.
- The approach to The Cross have a change of flooring, there are multiple poor quality repairs.
- Views from The Cross: West, South, North, East.

Market Cross to Bishop’s Palace Gardens

- Finger Post on West Street outside Russell & Bromley does not mention the Gardens.
- BID map – is the orientation correct? The map includes the Gardens.
- Cathedral sign adjacent to the BID map does not include the Gardens.
- Walking into the Cathedral, signage includes the Gardens in text only.
- Cannon Lane South Street entrance does not mention the Gardens.
- Inside the South Street entrance the Gardens are shown on the map in text only.
- The Archway signage is text only.
- Immediately prior to entering the gardens there is an illustrated information sign .
- The Bishop Palace Gardens are excellent quality, widely used by the community.
- Avenue de Chartres, West entrance. Internal illustrated signage.
- Signage at the end of the walkway immediately prior to entering the Gardens.
- Street level signage, wall mounted, discreet.
- West Street junction with Avenue de Chartres, finger sign includes the Gardens.

Westgate car park to New Park Cinema

- Finger post.
- West Street, the pavement is in acceptable condition and is wider than average.
- West Street is architecturally preserved and interesting, including Edes House.
- BID map, initially missed. Question the maps positioning and orientation, especially considering the location of the car parking on Orchard Street.
- From the map the route to New Park Cinema can be determined as West St/East St/East Walls.
- West Street, Brown Sign indicating the Museum.
- Flooring at the Cathedral courtyard entrance is poor quality.
- West Street planting is better kept than East Street.
- Tree surrounds are a trip hazard.
- Flooring, plant growth between tiles causes unevenness.
- Display plinth is currently empty, it is also a trip hazard and a missed opportunity for art within the community.
- East Walls, no signage.
- East Walls street view, Walls walk on the right hand side and well kept flooring on the left hand side.
- Green tree lined street .
- East Row junction with East Walls has no signage followed by a narrow pavement.
- East Walls junction with Priory Road has no signage, New Park Cinema is out of view.
- Toilet block is unused despite being included on the BID map.
- New Park Cinema has no signage on the north facing wall.
- Jubilee Park is excellently kept and welcoming.
- New Park Cinema name and icon is positioned out of view.
- New Park Cinema sign at entrance.
- New Park Cinema building.

Finding and walking the walls

- The Walls Walk can be joined at several points.
- Due to the four city gates having been removed and subsequent road building, the walls walk relies on way markers and interpretation panels to re-establish it. The way marker uses a ‘Gladius’ (a short Roman sword) to point the way.
- We joined the walls walk at the south east section in East Pallant car park and followed the short section that rises and falls within the car park.
- The wall is in reasonable condition but the path and adjacent green space is not. It is overgrown with weeds.
- Leaving the car park the walk is marked by round way markers set in the foot path and supported periodically with interpretation panels and maps.
- Interpretation panels are well placed and informative.
- The wayfinding system is however inconsistent with different styles for the three elements, the ground markers are cast in brass, other information panels that are wall mounted are cast in aluminium and painted and interpretation panels are wood with printed information in colour.
- The route is directed towards South Street along Theatre Lane.
- In South Street there are two conflicting way markers, one pointing south and the other pointing north. I assume this is to ensure a user will be directed towards Southgate car park. The information is not clear and the user is left to meander across the car park towards Prebendal Playing Fields.
- Close to the foot bridge a finger post point west - ‘Walls Walk’, although it is hidden by a tree.
- Walking along the footpath between the river and playing field the south west section of the wall becomes apparent, but inaccessible.
- Leaving the footpath on Avenue de Chartres, a way marker points north.
- An interpretation panel is placed to show a long section of the wall and the cathedral.
- Joining West Street a way marker directs the user across the road, but it is not clear how to access the south west section although it is accessible in Bishops Palace Gardens. A way marker may have been missed.
- Way markers are not always visible as the patinated finish blends into the colour of the surrounding paving.
- Crossing West Street the route leads towards North Walls and the North West section which is long and easy to access. It is a long uninterrupted section and shows views of housing and the rear of the County Council’s offices. It is generally pleasant, although a bench or two would be useful.
- At the end of this section it ramps down to Northgate where way markers direct the walker towards Priory Lane and Priory Park.
- Entering Priory Park the walls walk enters it best section with views across Priory Park, with the Guildhall and Cathedral.
- Leaving this section it is possible to see the East walls although access is by steps only. This section is not very interesting and eventually ramps down to Eastgate Square.
- Way markers direct the walker along East Street to St John Street and into East Pallant Car park to complete the circuit.

Following signs for Pallant Gallery from Northgate

- A finger post signs the way for Pallant Gallery at the junction of Priory Lane with North Street.
- It points eastwards towards Priory Park.
- It is the only sign pointing in this direction, there are no others along the route and so the pedestrian is left to meander past the park and towards St Martins Lane to enter East Street.
- The route is simple and pleasant but lacks any sign to confirm one is heading in the right direction.

Appendix 2

Observation photographs

Arrival


Cut Engine
Cut Pollution


CAFÉ
INSIDE TRAIN
STATION


THE FOUNDRY
CHICHESTER
COFFEE SERVED
CRAFT ALES
Live SPORTS
Relax in our
BEAUTIFUL
PUB GARDEN
FOOD
SERVED
DAILY

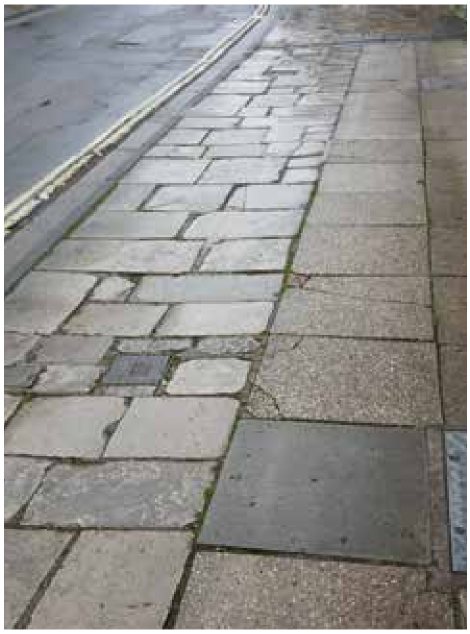

North


West


East


THE FOUNDRY
OUNDRY
South

Surfaces




HSBC

Surfaces

Textures

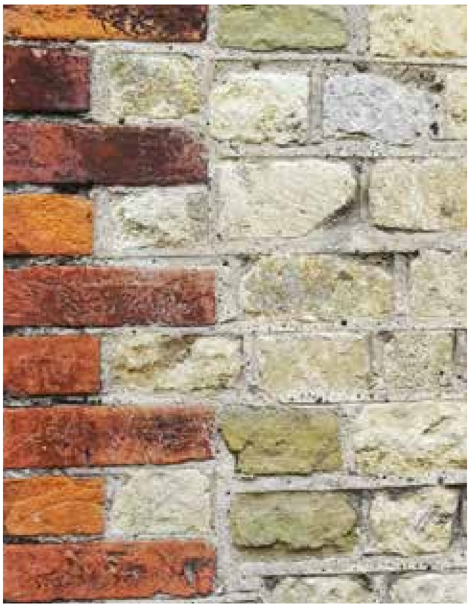












Signage


Friary P
SE 6
St John's Church


Ladies
Baby Changing
Disabled
City Centre
Via Subway

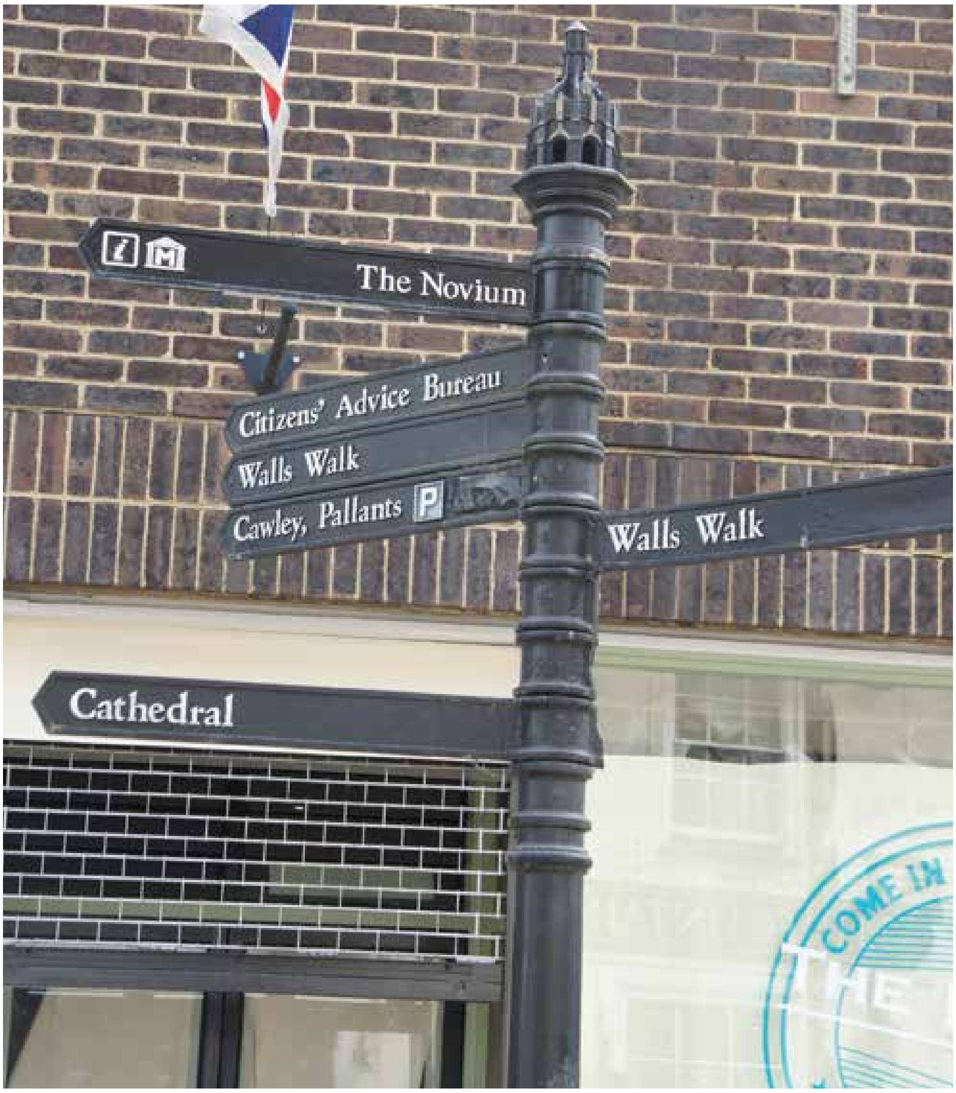

Ring road
Midhurst
A286
Portsmouth
(A27)
Westgate
County Hall
P
P 900
Long stay
P
John Piper
The Fabric
of Modernism
Pallant House Gallery


Tourist
Information
Welcome to
Chichester


Chichester


Pallant House Gallery
Post Office
Library
County Hall
Toilets
The Novium


PEDESTRIAN
ZONE
Except for
local buses and
loading by
in r arked bays
At any
time


The Novium
Citizens' Advice Bureau
Walls Walk
Cawley, Pallants P
Walls Walk
Cathedral
COME IN


CITY CENTRE
OVER FOOTBRIDGE


Chichester District Council
This is Cawley Priory car park
HAVE YOU PAID & DISPLAYED

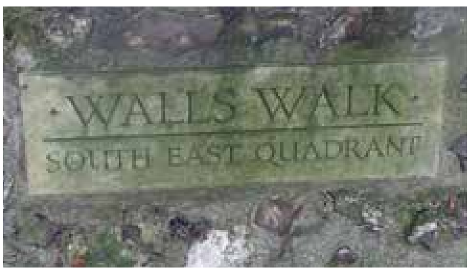

Chichester
CITY
WALLS


Gentleman
Baby Changing
Disabled
HELP POINT

Page 164

Street furniture

Walls Walk


WALLS WALK
SOUTH EAST QUADRANT

Retail area


IMAX


Garden
Show


SKIN

Appendix 3

References Sources and Acknowledgements

Contributors and consultees:

Colin Hicks - Chichester BID

David Coulthard - Chichester Cathedral

Andrew Churchill - Pallant House Gallery

Cathy Hakes - The Novium Museum

Lucinda Morrison - Chichester Festival Theatre

Rodney Duggua - Chichester City Council

Sven Latham - Noggin

Sebastian Martin - Flude Commercial

Dudley Pound - Chichester Ship Canal Trust

Steve Oates - Chichester District Council

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Department of Culture, Media and Sport -

www.gov.uk/government/organisations/department-for-culture-media-sport

Lindon Homes - Graylingwell

Other content:

All photographs used throughout this document were taken between May and August 2016.

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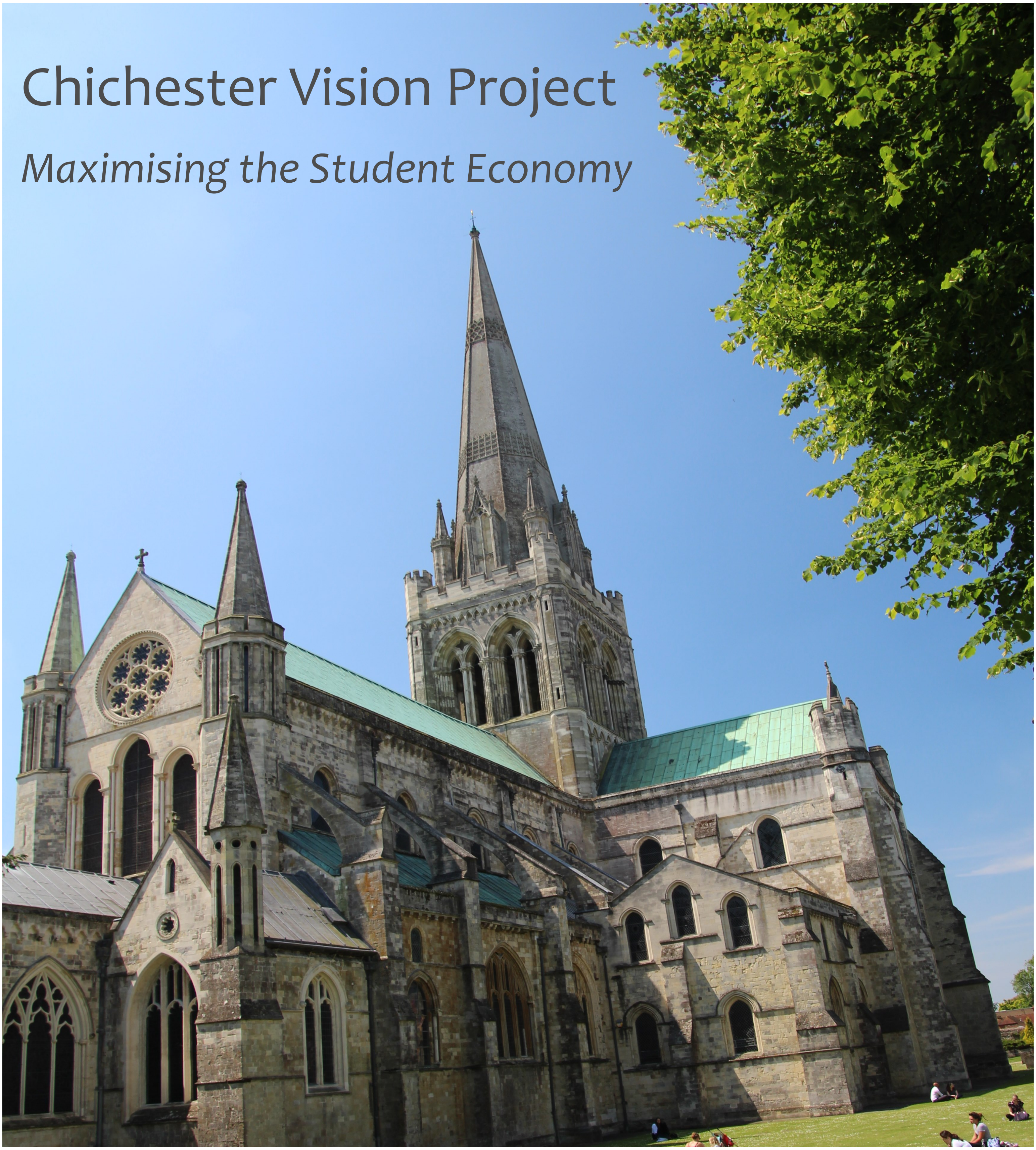
Chichester Vision Project

Maximising the Student Economy



Chichester District Council

University of Chichester

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Introduction

Chichester is a small city in West Sussex, England, surrounded by The South Downs and Chichester Harbour both Areas of Outstanding Natural Beauty. Although small, with a population of 24,000 (Lambert, 2016) the city centre is a base for shopping and eating for locals and tourists. After the growth of Chichester College with 12,000 students, (Chichester College, 2016) and The University of Chichester with 5,446 students (University of Chichester 2016), the city also has a substantial student population providing a younger demographic for the city to cater for and market opportunities.

Chichester District Council are undertaking a new task called the Chichester Vision Project. Chichester's Vision Project aims to help develop, improve and support the local economy to benefit residents, businesses and the area (CDC, 2015). To aid the project the aim of this report is to offer a fresh look at the opportunities that could maximise the student population. Previous research has highlighted the economic value of students to the local economy through direct spend but also through tourism activity, particularly in the form of VFR traffic. Key stakeholders in Chichester believe the city is not fully maximizing these opportunities, and have been keen to capture the voice of the student population as part of the visioning process.

The aim of the research undertaken was to fully capture the student voice on different aspects of Chichester.

This was done in the form of an online and written survey, which was filled in by 218 members of the University of Chichester student body, during a period of one week in March 2016. The survey was aimed at students from The University of Chichester, to be representative of students who are more likely to be living independently having moved to the area. It was felt that this student group would also generate the most tourism activity in the form of VFR, which had been identified as a key element of the economic value of students.

The objectives of this report is to uncover the students attitudes to Chichester and from this identify some of the main elements that Chichester could aim to improve under the following sections: (i) Shopping, (ii) Food and Drink, (iii) Nightlife and Entertainment (iv) Culture and Heritage.

In each section Chichester has been benchmarked against a number of similar cities, chosen for their comparative population and because they also have a university as seen below in **Figure 1**. This has been completed as it offers an insight into what Chichester could be offering their students. 'The prime purpose of benchmarking is not solely to carry out marketing research identifying what customers like or dislike, the main purpose is develop strategies to provide better services.' (Kozak, 2004)

	Chichester	Twickenham	Musselburgh	Winchester	Bangor	Lancaster	Inverness
City Population	24,000	52,396	21,900	45,184	18,808	59,325	46,870
Student Population	5,466	5,165	5,215	6,880	10,766	13,336	7,899

Figure 1. Benchmarking Analysis

Each section will examine what Chichester already has to offer, what other cities are offering their students, the captured student voice and results from the survey and finally a section of recommendations for Chichester District Council to take into consideration for their Vision Project.

Survey Demographics

Key profile questions were asked to identify the type of students taking part in the survey and therefore the factors that may influence their opinion. This was done to check that the survey had successfully reached the target audience and so opinions and attitudes towards Chichester would accurately reflect the student voice.

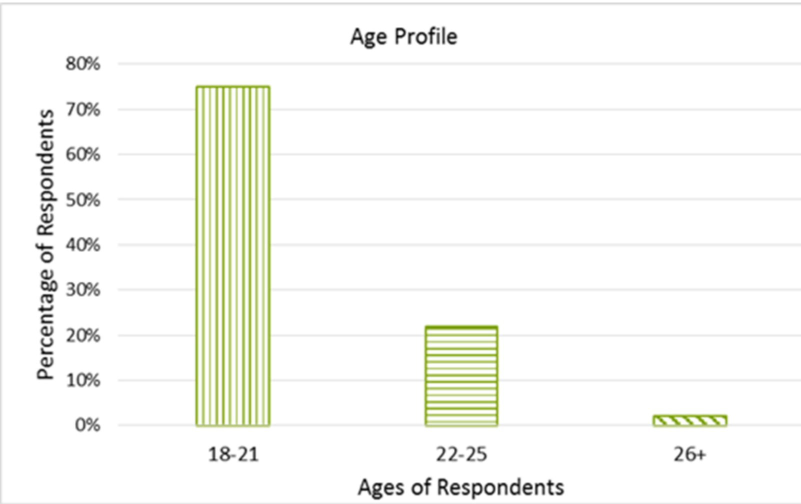

Figure 2. Survey Results: Which age range do you fall into?

Figure 3. Survey Results: Male or Female?

Figure 2 shows that overall the majority of students were aged 18-21 (75%), while 22% of students where aged 22-25 and 26+. This shows that the survey has reached students of all ages who will have a range of different opinions and attitudes towards Chichester as a student city.

As shown in **Figure 3** 54% of students were females and 44% of the students were male. As a result, the survey is nearly equally representative of both genders.

Students were also asked to identify whether they were in first year, second year, third year or postgraduates. **Figure 4** shows that the majority of students were from second or third year (80%), 19% of students were from first year and 1% of students were postgraduates. This shows a variety of students from different academic years were surveyed to get opinions from across the year groups. This also highlights that most students were able to accurately answer the survey, because they have been in the city long enough to be able to reflect on what Chichester offers the student population.

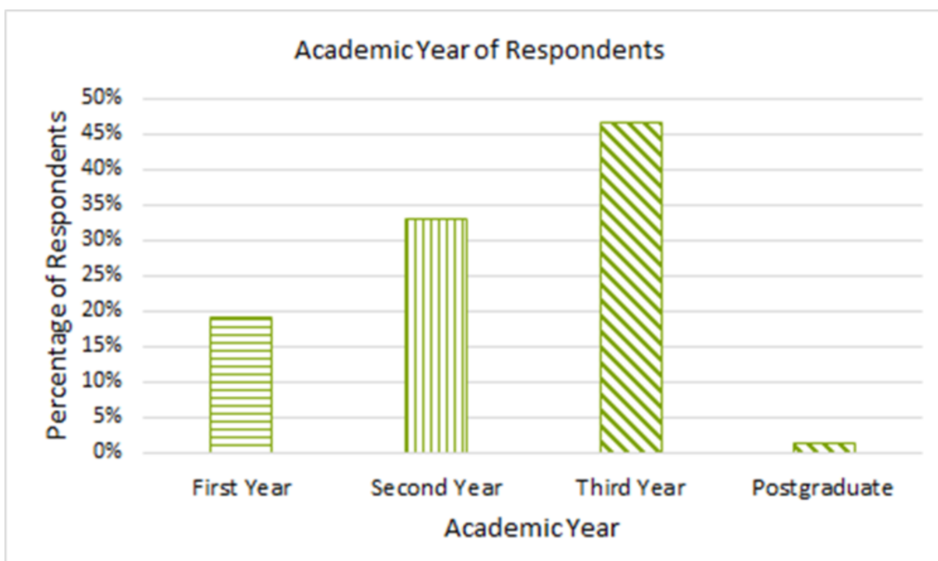

Figure 4. Survey Results: Which academic year students are in

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The Students were asked what type of accommodations they lived in. This ranged from living at home, student houses in Chichester/Bognor or halls (BOC, BRC or Stockbridge halls).

The results in **Figure 5** show that the students surveyed live in or around Chichester, as the majority of students lived in student houses in Chichester (53%).

Figure 5 also shows that more students were surveyed who lived in halls within Chichester (13%) than those who lived in Bognor Regis halls (1%). Overall 19% of students lived at home.

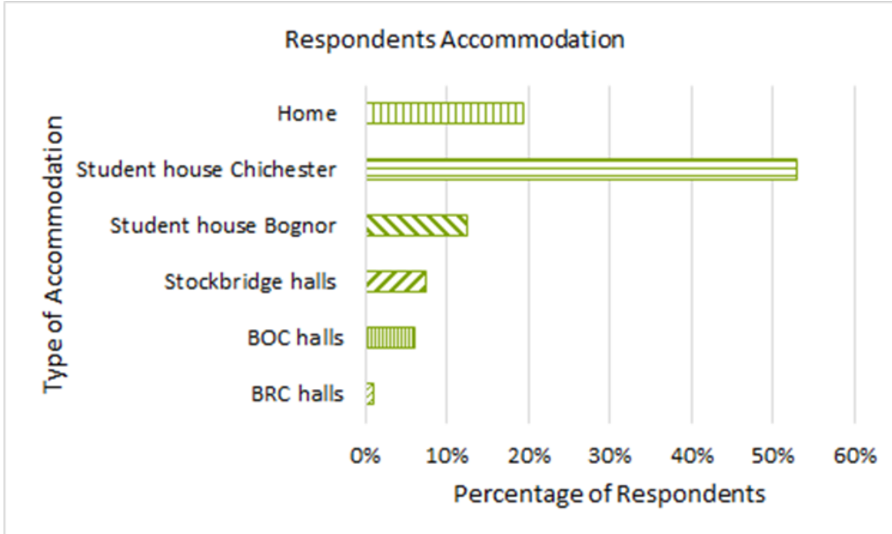

Figure 5. Survey Results: Where do you live?

Students were then asked to identify where they lived if they selected home. From this 10 students lived in Chichester, while the other 30 students lived in a range of places – often still near to Chichester, such as Brighton, Bognor Regis and Portsmouth. This means it is likely some students will have had prior knowledge of the area.

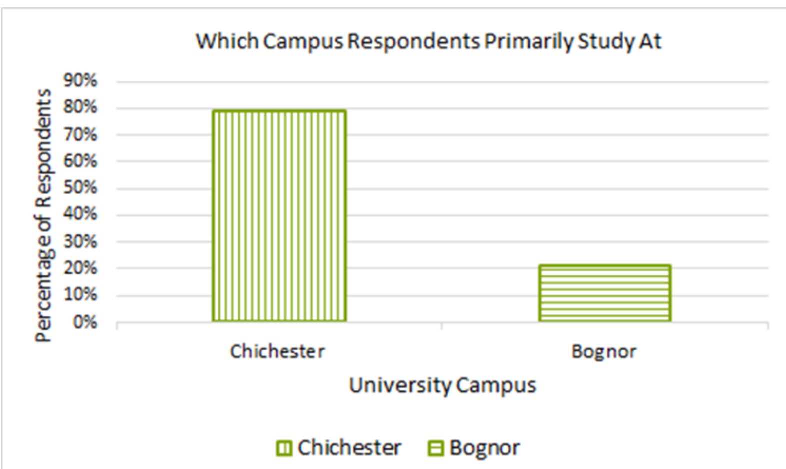

Figure 6. Survey Results: Which campus respondents primarily study at

Identifying which campuses students primarily studied at was also a question that was asked as seen in **Figure 6** to see how much time respondents were using the area for studying and therefore potentially visiting Chichester centre before or afterwards. Over all the Chichester campus had 79% of students studying there while Bognor had 21%. The results show that since the majority of students primarily used Chichester campus as their place of study, there should be a higher rate of students going into the city centre.

Students were also asked how often they visit Chichester (other than the campus) during the day, in order to understand how often they visit the city centre. The results in **Figure 7** show that majority of students (31%) who visit during the day are only visiting at least once a week, and that the majority of students (28%) who visit during the night are only visiting once a month. This shows very little engagement between the students and the city centre, as only 17% of students are visiting during the day every day and only 4% of students are visiting at night every night.

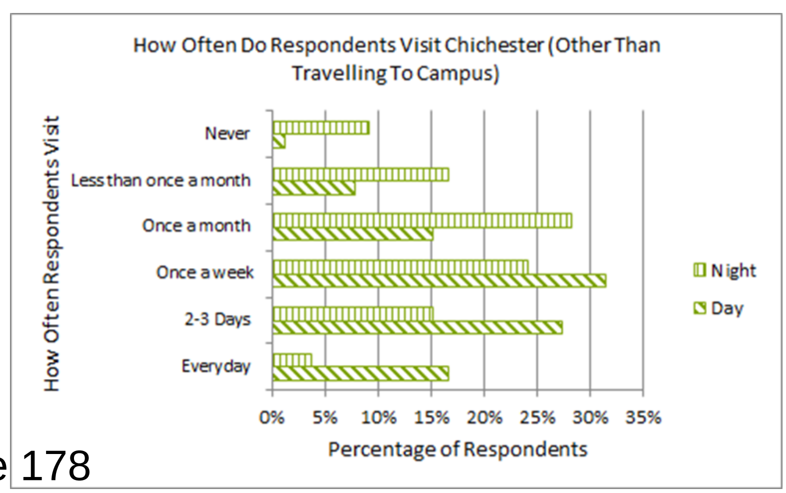

Figure 7. Survey Results: How often do you visit Chichester?

Shopping

The SWOT below in **Figure 8** shows the current situation of Chichester city centre as a shopping destination.

Strengths	**Weaknesses**
Shops are spread over four main streets that lay in a cross formation (North, South, East and West Street) at the centre of Chichester (see **Figure 9**) The middle of these streets are marked by the Market Cross (a stone monument) – a popular meeting point. This layout is an advantage as it creates a shopping precinct where all the main high street and independent shops can be found easily next to each other. The means visitors can more efficiently shop for their items at one location and therefore are more likely to visit. The formation of this popular central shopping location has given rise to this area being the central business district of the city. This creates an attractive location for new shops to set up, as there is already an established shopping culture and target audience for them. The composition of shops is predominantly independent retailers with the addition of high street stores such as H&M, New Look, Next, M&S and the department store House of Fraser. This offers some variety to customers as well as the comfort of some well-established 'go to' stores.	Due to the architecture of the city centre and small average building size some shop's only have small branches, such as Topshop, leading to limited stock. These tend to be the shops are favoured by students such as River Island & Accessorise. This reduces the variety of products and styles on offer, limiting the target audience to the small range available. This could influence visitors to shop elsewhere or prompt them to shop online instead. The shops in Chichester are based at a medium to higher end price point and comprise of many individual and lesser known boutiques as well as high street names such as Pandora, White Stuff, Clarkes and Oasis. There are very few low priced shops e.g. Primark and Dorothy Perkins. For this reason, the shops in Chichester and the conservative style of clothes they stock appeal primarily to those aged 36+ missing out on the student market (target age range 18-22). (Experian a world of insight, 2015). There is little parking in Chichester causing congestion at weekends. Parking is also pay on exit which may prevent visitors from staying longer in the city and spending more.
Opportunities	**Threats**
Chichester is surrounded by many fields. With 'red tape' obliging, there may be opportunity to build a small shopping centre of more affordable shops, e.g. Primark, which would target the student population. Existing shops in the city centre could target students with promotions for example 20% off discounts and student exclusive nights. This would appeal more to students and encourage spending and usage within the city. Change car parks to pay on exist so that visitors to not constrained by time. Doing this means it is more likely visitors will stay longer than they initially planned, e.g. popping into Costa for a coffee before they leave.	There are several competing shopping locations within an hour's drive of Chichester. These include Bognor Regis, Brighton, Portsmouth, Whitley and Southampton. Losing perspective buyers to competition greatly reduces expenditure in Chichester city. Advances in technology have made it easier for buyers to shop online as an alternative to going in store in person. This is especially true for students as 'the cyber generation' (WWWMetrics, 2016). If a substantial proportion of perspective buyers from the student population go elsewhere it greatly reduces student expenditure in Chichester city.

Figure 8. SWOT Analysis for shopping in Chichester

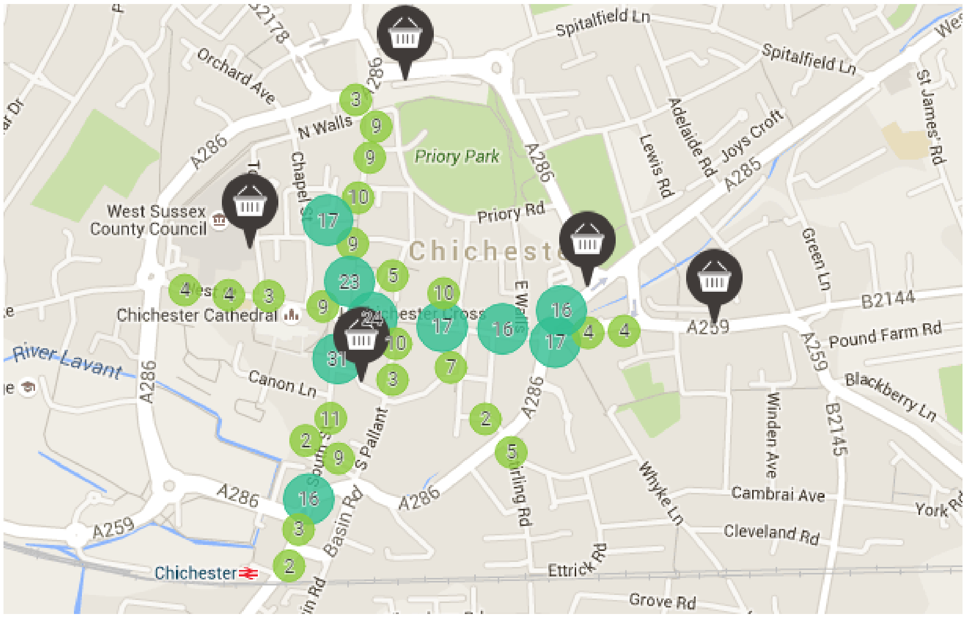

Figure 9. Map of shopping in Chichester

The SWOT has identified that the shops in Chichester lack appeal to the student market. As well as this, Chichester also suffers from close competition and therefore, needs to develop in order to retain customers and prevent them shopping elsewhere. As a way to beat this, the opportunities have uncovered a possibility to introduce more affordable shops with enticing promotions.

Benchmarking

The benchmarking analysis below compares a variety of cities that are a similar size to Chichester and also have a University.

Although Chichester has a variety of independent stores, there is no principal shopping centre. From **Figure 10** below you can see that many competing university cities provide between 1-3 shopping centres. This gives students who're usually on a low cost budget a large amount of variety. Furthermore 'University maintenance grants for lower income students in England and Wales are to be scrapped from September 2016, Chancellor George Osborne has said'. (BBC News, 2015) meaning students will have less disposable income to spend on luxury items and a greater need for affordable shops. This could also be another reason for students to shop elsewhere where there are cheaper shops.

Shopping					
Twickenham	**Musselburgh**	**Winchester**	**Bangor**	**Lancaster**	**Inverness**
2 shopping centres + independent stores	Small independent stores	1 shopping centre + independent stores	3 shopping centres + independent stores	2 shopping centres + independent stores	2 shopping centres + independent stores

Figure 10. Benchmarking Analysis

Student Voice

The following graph in **Figure 11** looks at how long students stay in Chichester during the day, to determine whether students are satisfied with the shops within the city.

The results show that 56% of students stayed between 2-4 hours during the day, 24% of students stayed up to an hour and only 11% of students stayed longer than 5 hours. This suggests that students tend to go into the city briefly for specific items and find there is nothing to keep them for a substantial or prolonged time in the city centre. This again adds to the reason behind students visiting other cities.

The students were asked on the level of priority of there being more mainstream shops such as Primark (which are more affordable). The graph in **Figure 12** shows that the development of affordable shops within Chichester is a high priority as 45% of students ranked this a 5 (the highest rating). Whilst 22% of students also ranked the priority as a 4. This does show that the student voice wants more shops to be catered to them.

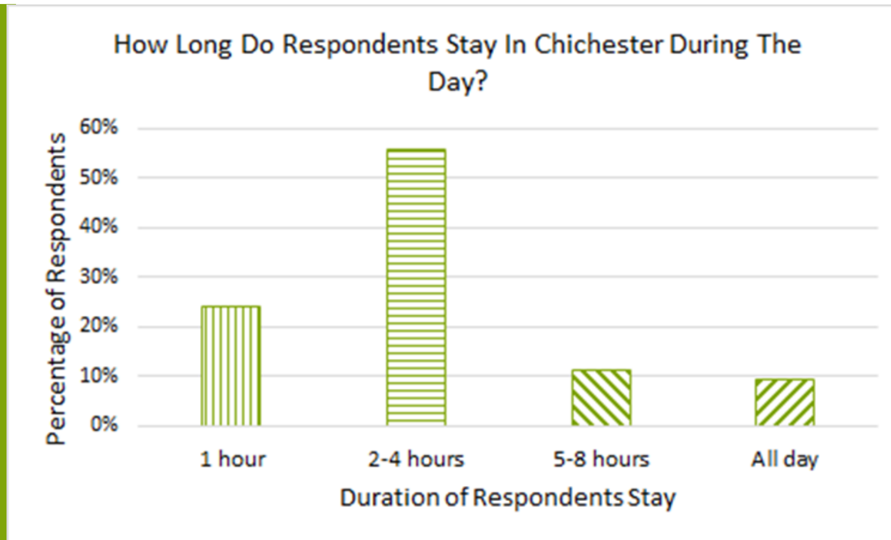

Figure 11. Survey Results: How long do respondents stay in Chichester during the day?

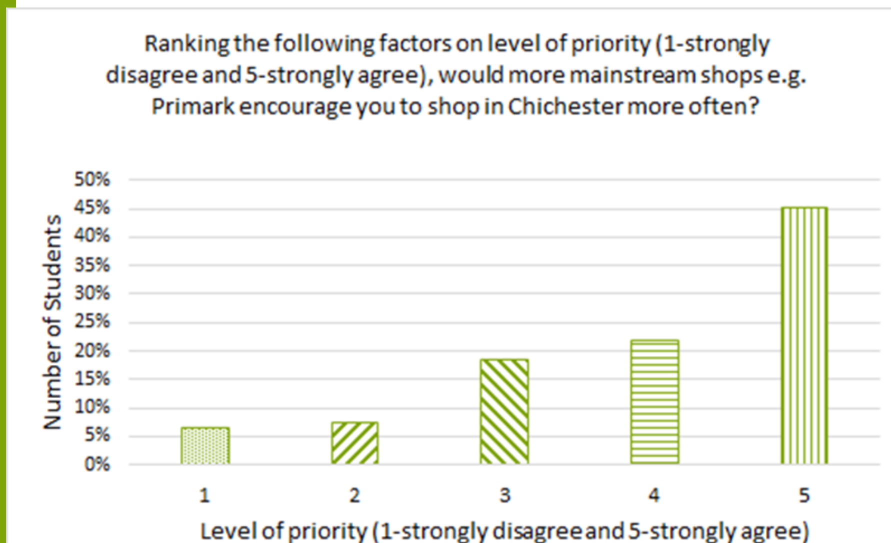

Figure 12 Survey Results: Would more mainstream shops encourage you to shop in Chichester more often?

Opportunities For Future Development

Overall the survey has shown a strong key theme. Students aren't staying in the city centre due to shops not having enough variety and being too expensive. While there may not be land available for a shopping centre, as exhibited by the benchmarking, a recommendation is to develop a larger quantity of affordable shops which match the disposable income levels of the student population. The student voice has shown a strong desire for this, especially considering the abolishment for maintenance grants. Creating more shops that fit the student lifestyle or student exclusive discount nights (MCR Student Night Out, 2015) would encourage students to stay in the city for longer. Thus increase student expenditure- a substantial benefit the University has to the city. It would also greatly improve the student experience and encourage more students to the University as a whole and to stay in the area after graduating.

Food and Drink

According to the benchmarking analysis below in **Figure 13** there are approximately 196 restaurants in Chichester. The SWOT below shows the current situation of Chichester city in terms of dinning.

Strengths

Chichester has a significant amount of well-known chain restaurants such as Wagamama, KFC and Pizza Express, as well as chain coffee/ sandwich shops including Costa and Subway. This fulfils the market for fast food and typical high street convince restaurants that are popular with students and tourists alike.

Chichester has a great variety of eating establishments as there are also smaller independent tea rooms, snack shops, pubs and hotel restaurants. This entices tourists as it gives more options for visitors who would like to try more local and individual food/drink.

A lot of these restaurants/ café's are situated in the centre of Chichester as some are shown in (**Figure 15**) on the next page. (Visit Chichester, 2016). This means visitors are able to shop and eat at the same location which creates a more substantial and interesting experience while in the city centre.

The Wordle in Figure 17 on the next page, shows the most common restaurants visited by students according to a question (Which restaurants do you visit in Chichester?) asked in our survey. Of these, the most popular restaurants all offer student discounts or discounted days, (shown in **Figure 16** on the next page). Many of them entail a NUS card, which a large majority of students own proving this a key and successful tactic in attracting restaurant business from students.

Weaknesses

Although many chain restaurants offer discounts to students, most of the independent café/restaurants do not, such as Knife & Fork Café on South Street. This means that these independent businesses may struggle to attract the student market and therefore, are not benefitting from, or utilising the potential revenue that the student population could bring.

Results from our survey (**Figure 14**) showed that many students felt businesses were not advertised enough within the University. A lack of advertising could be a reason for why students don't tend to visit lesser known restaurants – as they simply don't know about them.

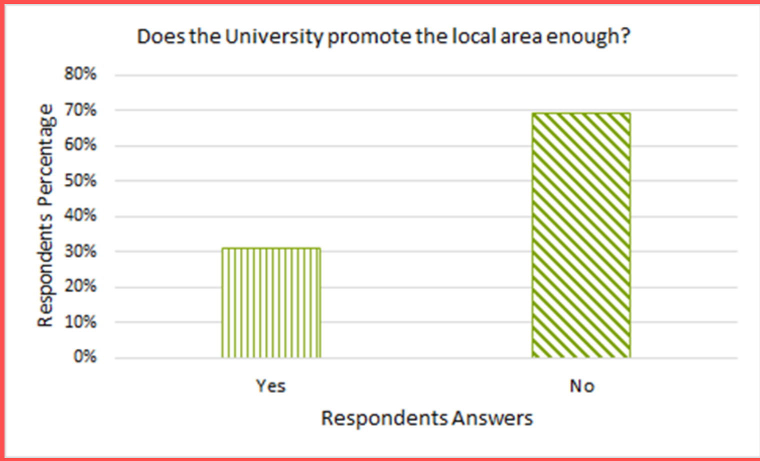

Figure 14. Survey Results: Does the University promote the local area enough?

Opportunities

The exception to the above discount theory is Wetherspoon, Nandos, Frankie & Bennies and Wagamama, who don't offer discounts but are still highly popular. This is likely to be due to the standard low prices and relaxed attitude at these restaurants which appeal more to the student lifestyle. This means that there could be an opportunity in the market for more pubs like this to set up in Chichester.

Threats

There is currently no nightclub or evening venue in Chichester. But if one were to set up, there is a possibility that students would chose to eat at resturants less, in order to save their money for drinking in the evenings instead. This could result in some loss of trade from the student population in eating establishemnts in Chichester.

Figure 13. SWOT Analysis for food and drink in Chichester

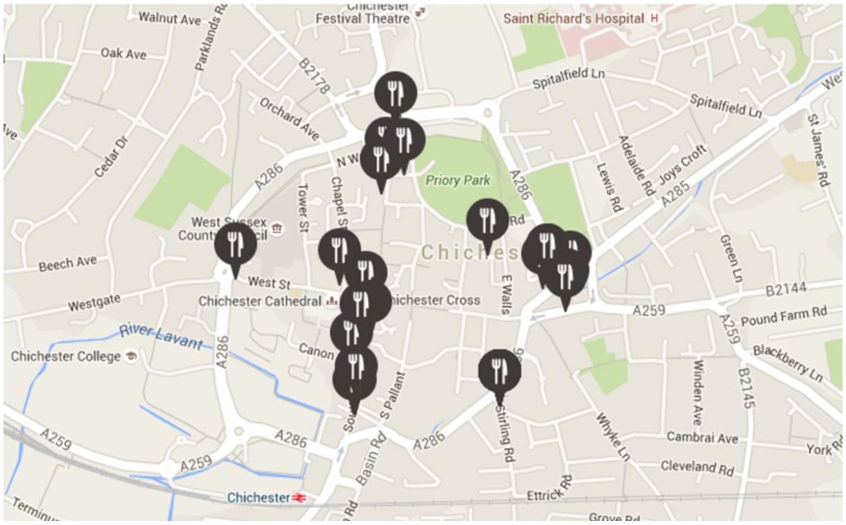

Figure 15. Map of restaurants in Chichester

The SWOT has identified that there is a great variety of eating establishments within Chichester. However, independent restaurants lack appeal to the student market due to fewer discounts/offers and lack of advertising within the University. This creates an opportunity for independent restaurants to tap into and benefit from the student economy.

Restaurant	**Discount**
Pizza Express	NUS Card Holders: 40% off Mondays and Tuesdays. 20% off Wednesdays, Thursdays and Sundays.
Zizzi	NUS Card Holders: 40% off Monday and Tuesday. 25% off Wednesdays, Thursdays and Sundays.
Mc Donald's	NUS Card Holders: Free McFlurry or Burger
ASK	NUS Card Holders: 40% off food bill Monday and Tuesday. 25% off Sunday, Wednesday and Thursday.
Belle Isle	Free drink with a Burrito on Mondays or Nachos on Thursdays.
Prezzo	NUS Card Holders: 25% off Sunday-Thursday
Slug & Lettuce	50% off food every Monday.

Figure 16. Food and Drink in Chichester

Benchmarking

The benchmarking analysis below compares a variety of cities that are a similar size to Chichester and also have a University.

As seen in the SWOT analysis, Chichester has approximately 196 restaurants. This is quite high compared to the other cities shown in **Figure 18**. Whilst researching into the other cities, it was evident that they too provide a large number of chain restaurants and a variety of independent restaurants. But, differently, their independent restaurants have also tapped into the student economy by offering students specific deals all through the week. For example Molly's Grill Pizzeria, (2016), in Lancaster, offers students a happy hour deal with discounted meals.

Food and Drink					
Twickenham	Musselburgh	Winchester	Bangor	Lancaster	Inverness
310	142	158	119	172	150

Figure 18. Benchmarking Analysis

Student Voice

The graph in (Figure….) was used to establish the University of Chichester's students satisfaction levels on the opportunities for eating out in the city (rated on a scale of one to ten, ten being the highest).

From this it was identified that most of the students (53) rated the opportunities as an 8, which suggests most students are satisfied with the opportunities for visiting restaurants and the variety of other food establishments in the city.

However, it is important to note that not every student was satisfied with the opportunities that were available as only 16 students rated the food opportunities as 10 (the highest satisfaction rating) and 38 rated below a 5. This shows there is still opportunity for future developments within the food and drink sector.

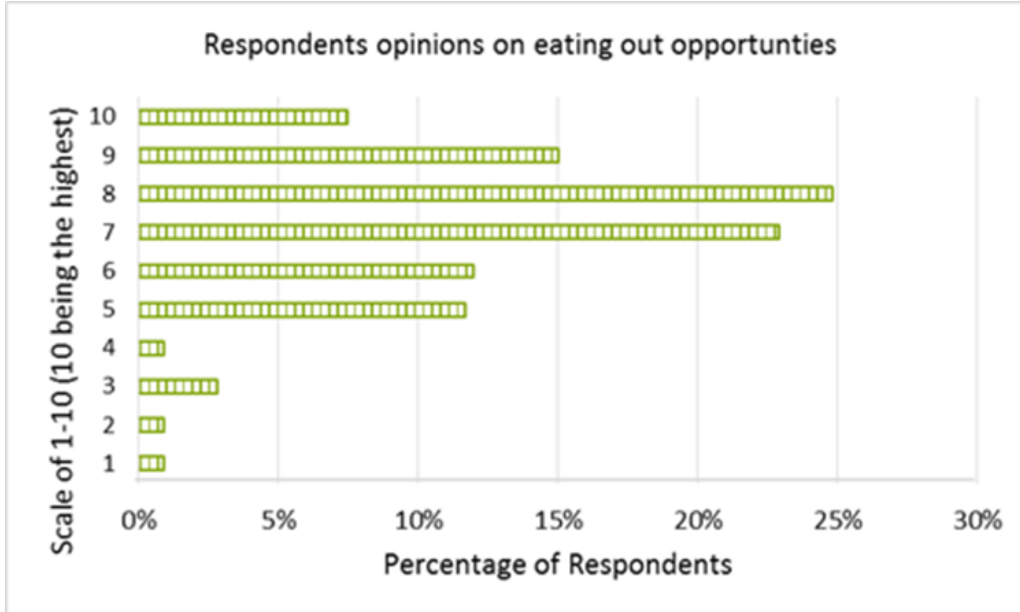

Figure 19Survey Results: Respondents opinions on eating out opportunities

Figure 17. WORDLE 'What pubs and restaurants in Chichester have you visited?'

Opportunities For Future Development

As the majority of students are satisfied with eating out in Chichester, the survey has shown that restaurant development is a lesser priority as part of the vision project. However, to increase the student's satisfaction rating even further there is still room for independent food establishments to cater more for the student population and this could be central to developing a night time economy. Therefore, it is recommended that independent food establishments create inventive deals to entice students. This is shown to have worked in other cities in the benchmark. Doing this could enhance the student experience in the city as well as encouraging the student population to support the market for the local business establishments. (Biggar Economics, 2014).

Nightlife & Entertainment

Chichester Gate is the primary nightlife and entertainment venue in Chichester. As seen in **Figure 20**, it is a 5 minute walk from the centre of Chichester, and consists of a small complex of popular restaurants accompanied by a cinema and bowling alley. The restaurants include mid-priced franchises such as McDonalds, Nandos, Gourmet Burger Kitchen and Frankie and Benny's. Most of these restaurants offer a reward loyalty card scheme to encourage customers to come back. The cinema (a Cineworld franchise) is open every day/evening and shows a variety of all the latest released films. The cinema, as well as the bowling alley offers discounted prices for students and large groups to encourage the student population to visit them.

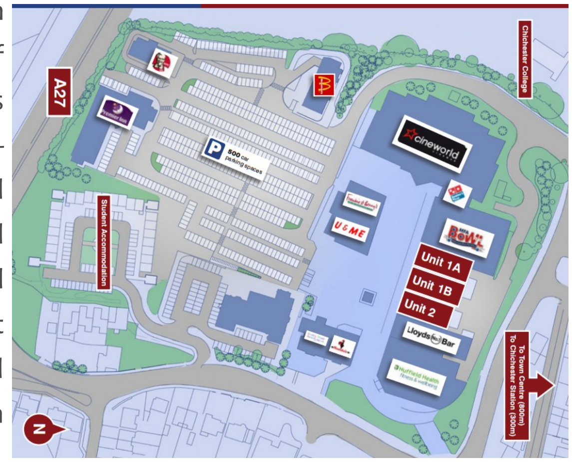

Figure 20. Chichester Gate Map

Westgate leisure centre is located half a mile's walk from Chichester train station. The centre holds a swimming pool, a gym, a 6 court sports hall, 2 squash courts, dance studio and cafe. The gym also hosts a variety of exercise classes every day to suit all fitness levels. To encourage students to visit, the leisure centre offers a student membership fee of £32 per month, saving £7.95 on the standard adult membership price (£39.95). (Westgate Leisure Centre, 2016)

There is currently no nightclub in Chichester. However, there are 11 pubs/bars in walkable distance from the city centre that stay open until at least 12am. The pubs serve food and drinks at a mid-price point which reflects the disposable income of the locals. But there are also chains such as the Slug and Lettuce and Wetherspoon's which offer meal deals and drinks for a more affordable price (Visit Chichester, 2016).

Benchmarking

The benchmarking analysis below compares a variety of cities that are a similar size to Chichester and also have a University.

As you can see in **Figure 21,** each city has a wide variety of nightlife and entertainment. Each city has at least 1 nightclub. As Chichester has none, it is weak in this area and is not competitive with the student nightlife found in the benchmark cities. As well as studying and sports, students often find nightlife to be a key factor when choosing a University. Therefore the lack of nightlife on offer may deter many students looking at studying in Chichester. It also is less appealing for friends and relatives visiting and therefore, the city may not benefit as much from the VFR knock on effect that other university cities encourage. (Hunter-Jones, 2008).

Nightlife and Entertainment

Twickenham	Musselburgh	Winchester	Bangor	Lancaster	Inverness
1-Nightclub 9-Bars 13-Pubs 2- Comedy Clubs 3-Leisure Centres 3- Bowling Alleys 3-Cinemas 2-Bingo	1-Nightclub 16-Bars 10-Pubs 1-Social Club 2-Leisure Centres 1- Bowling Alley 1-Cinema 3-Bingo	2-Nightclubs 11-Bars 12-Pubs 1- Comedy Club 1-Leisure Centre 1-Cinema	3-Nightclubs 9-Bars 7-Pubs 1-Leisure Centre 1-Cinemas 1-Bingo	4-Nightclubs 21-Bars 14-Pubs 1-Comedy Club 1-Adult Entertainment Club 3-Leisure Centres 2-Bowling Alleys 2-Cinemas 1-Bingo	1-Nightclub 9-Bars 8-Pubs 2- Comedy Clubs 2-Leisure Centres 1- Bowling Alley 2-Cinemas 1-Bingo

Figure 21. Benchmarking Analysis

Student Voice

Students were asked on their perceptions of nightlife and entertainment in Chichester. They were asked whether Chichester having a nightclub has affected their degree experience and following on from this students were asked if Chichester needed a nightclub.

Overall 115 of the students surveyed said that not having a nightclub has negatively affected their experience. And as a result of this, 171 students who were in second or third year have negative attitudes towards their degree experience as a whole.

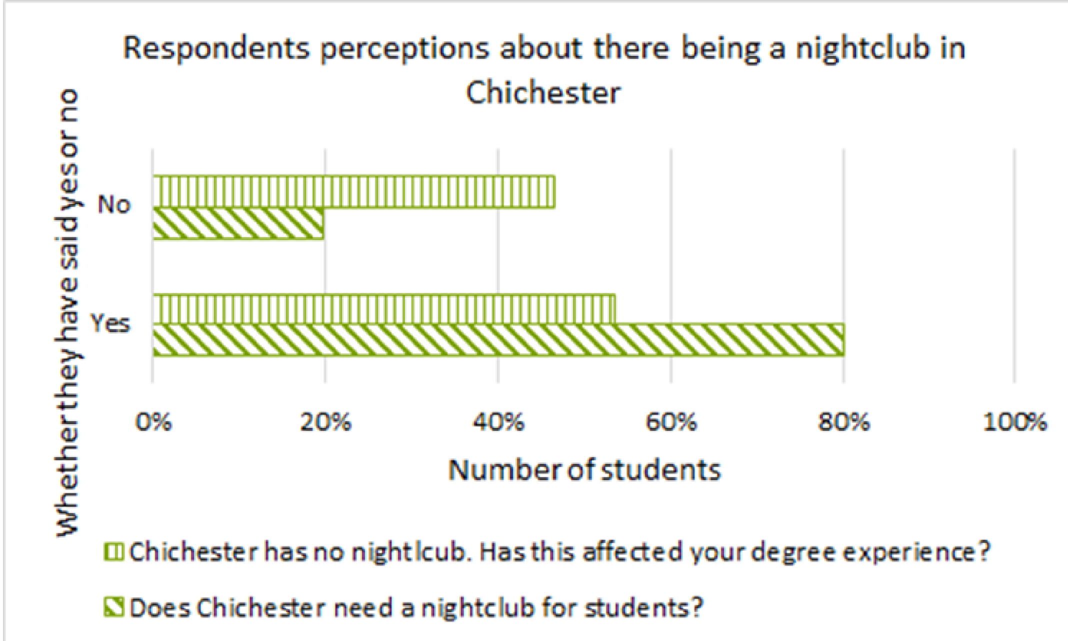

Figure 22. Survey Results: Student perceptions about there being a nightclub in Chichester

Following on from this the results identified that 174 students said yes to Chichester needing a nightclub. One student commented that “Nights out are important for the university overall experience, aiding you to meet new people and enjoy yourself away from the stress.” This was a key theme throughout as another student commented that they were not satisfied “Because it's part of the student experience having nights out.” Another theme from the students’ comments was that they only have the SU for nights out and this wasn’t enough. As one student commented that “The SU is repetitious and becomes very dull due to this”, and another comment was Chichester needs “a place for students to meet and have a good time without always having to go to the SU which provides the same experience week after week and attracts the same people.”

Opportunities For Future Development

The student voice shows a significant desire and need for a nightclub in Chichester. From the responses, it appears the addition of a nightclub would greatly enhance students experience and increase the social aspect of living in the city as well as encourage VFR. Until the summer of 2015 Chichester had its own nightclub, Thursdays. The nightclub closed due to the landlord reclaiming his premises, not due to lack of business (Gordon, 2015). This would suggest that there is sufficient local demand to support a nightclub in the city even when university students are absent during the summer months. Therefore, we recommend that as part of Chichester's vision, the creation of at least one nightclub is an essential development to the city in terms of satisfying the student population. In order to ensure that the business is sustainable it may be beneficial to consider the addition of a multi-purpose venue that caters for a wider audience. This space could be an innovative/creative hub for the whole community in Chichester and also provide a venue for performance, culture and exhibits. Better social opportunities will make Chichester a far more competitive city and provide much needed entertainment. Therefore, the survey has highlighted this as the highest priority improvement that will be particularly economically beneficial to the city, following full consultation with the community.

Culture and Heritage

Developed by the Romans into a strategic city in 44AD (Lambert, 2016), Chichester's identity is filled with history and heritage. Much Roman architecture is still visible and is an integral element of the tourism landscape. To present its history, Fishbourne Roman Palace and The Novium museum in the city centre exhibits artefacts, intriguing stories and historic information from Chichester District for visitors to see. In the surrounding area there is also Tangmere Military Aviation Museum, Weald and Downland Open Air Museum (100,000-130,000 annual visitors) (Weald and Downland, 2015) and Amberley Museum and Heritage Centre. By providing much opportunity for visitors to seek the heritage and history, Chichester District clearly utilises the area's past to make it of public interest.

Chichester Cathedral, dominating the architectural grandeur of city for 900 years, is also a place of significant heritage and attracts visitors to its services and different festivals throughout the year. As well as flower and light festivals, it holds events to do with worship, music, education and restoration – opening itself up to audiences with different interests. (Chichester Cathedral, 2016).

Furthermore, Chichester's surroundings have a high quantity of historic houses open to the public. These include Arundel Castle, Parham House & Gardens, Petworth House, Uppark House, West Dean Gardens, and Cowdray House. These are very popular days out for families and particularly attract the older wealthy demographic (Timothy & Boyd, 2003). They also offer student and group discounts on tickets to make themselves more accessible.

Chichester is also a keen area for arts and culture. Pallant House Gallery in the heart of the city houses one of the best collections of modern British Art in the country. Additionally, Chichester Festival Theatre has an international reputation for high quality work. It holds performances of different genres to appeal to all audiences throughout the year. For students- Both facilities encourage school groups and offer group discounts as well as student prices to make themselves more accessible to the student population.

Benchmarking

The benchmarking analysis below compares a variety of cities that are a similar size to Chichester and also have a University.

As you can see in **Figure 23** below, each city has a minimum of six significant attractions. Not all of them will be appealing to students, although a high number of them offer student discounts. For example The Royal Green Jackets Museum (2016), offers a discounted price for students, giving them an incentive to visit the attraction. A large number of the attractions below have free entry, but still aren't necessarily going to be appealing for the student community as they have different interests.

Culture Attractions

Twickenham	Musselburgh	Winchester	Bangor	Lancaster	Inverness
Twickenham Museum	Musselburgh Race-course	Winchester Castle	Ulster Folk and Transport Museum	Lancaster Castle	Inverness Cathedral
Twickenham Stoop	Newhailes	Marwell Wildlife	Ward Park	Ashton Memorial	Urquhart Castle
Twickenham Rowing Club	Brunton Theatre	Wolvesey Castle	Bangor Marina	Judges' Lodgings	Cawdor Castle
Twickenham Stadium	Inveresk Lodge Gardens	Royal Green Jackets Museum	Bangor Abbey	Lancaster Priory	Eden Court Theatre
World Rugby Museum	Musselburgh Links	Winchester City Mill	Scrabo Tower	Lancaster City Museum	Clava Cairn
Marble Hill House	Dolls Museum Mussel-burgh	Winchester Cathedral	Bangor Castle	Grand Theatre Lancaster	Ness Islands
	Jungle Gemz	Adventuredome		Lancaster Cathedral	Chanonry Point
		Old Minster, Winchester		The Storey	Inverness Castle
		The Gurkha Museum		The Gregson Centre	Plodda Falls
				Lune Millennium Bridge	Vastle Stuart

Figure 23. Benchmarked Culture Attractions

Student Voice

To gather student's perspectives on this topic a question was asked to see which tourist attractions were engaging students in the city. The graph in **Figure 24** shows that the majority of students have not visited many of the attractions. The tourist attraction that has the most student visitors was Chichester Cathedral. 140 students out of the 218 surveyed had visited this attraction. This could be because the attraction is located in the city centre which means it is easily accessible for the students. Another rationale could be because there is no cost for many of their services and they regularly hold events. However, the least visited attraction by the students is the Pallant House Gallery with 193 students not having visited. This could be because the attraction charges a student rate of £5.50 and students would not part with this much money unless they have a true interest in visiting. However, this outcome is surprising as the University runs a fine art degree and therefore, it would be expected that more University of Chichester students would be interested in this attraction.

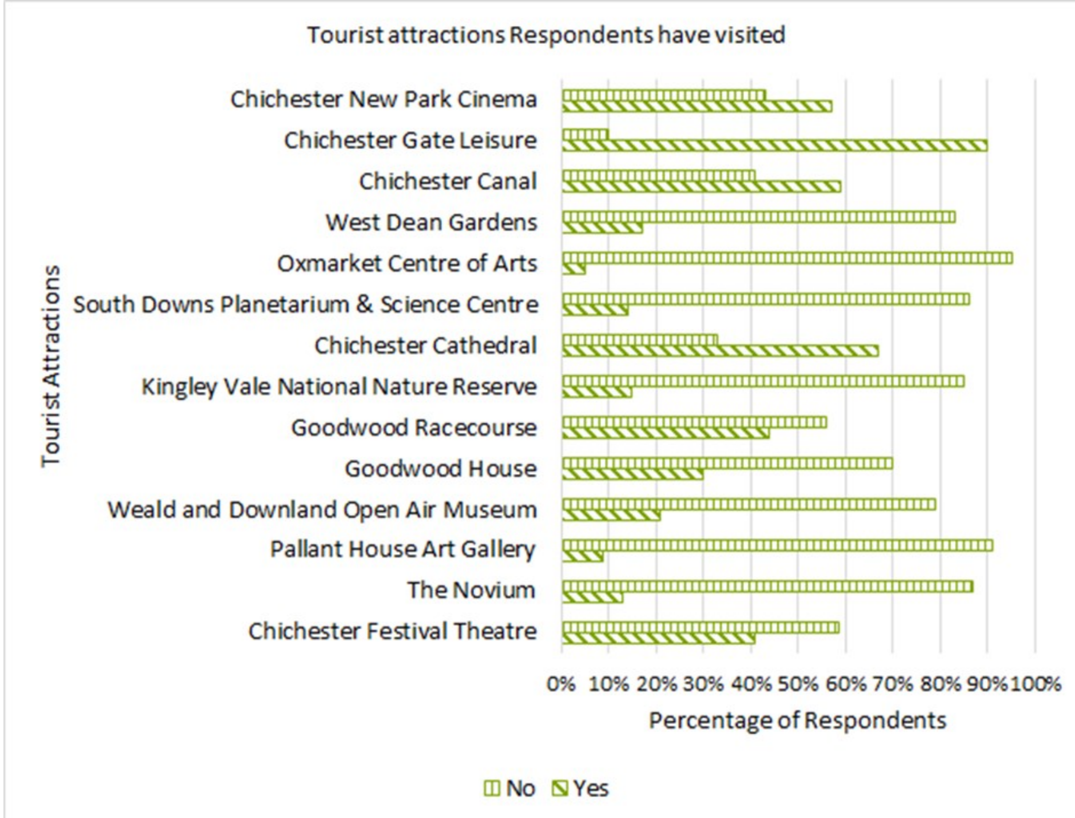

Figure 24. Survey Results: Have you visited these tourist attractions?

Opportunities For Future Development

Chichester has a lot of cultural and heritage attractions in the form of museums and historic buildings similarly to our benchmarking cities. However, it is apparent that this type of attraction is not appealing to the student population. Nonetheless, they are popular with the local/older demographics' and meet tourists interests; as typically heritage/cultural attractions attract ages 35+ with higher disposable income. (Morris Hargreaves McIntyre, 2007).

For this reason, as well as being very in keeping with the style of the city, we believe that these cultural/heritage attractions should not be changed for students as part of the Chichester vision project, as many of the attractions already offer incentives and discounts to students. Therefore we would suggest that there is a need to focus on how to draw students into these attractions, perhaps marketing them as days out that they can enjoy with their VFR's. However, we suggest prioritising other areas that this report highlights for improvement, such as entertainment and nightlife. This will be more efficient in enhancing the city for students.

Conclusion

Aims and Objectives

The aims of the research stated in the introduction was to capture the student voice. The aim has been met due to the 218 students who were surveyed, which successfully captured a range of student demographics, and also due to the range of questions that were asked about the Chichester area.

The objectives for the report were to uncover student's attitudes to Chichester and identify what could be improved within these sectors: (i) Shopping, (ii) Food and Drink, (iii) Nightlife and Entertainment and (iv) Culture and Heritage. The objective has been met as recommendations have been stated in each section throughout the report.

The recommendations were formed by highlighting the student voice captured from the survey, taking into consideration the SWOT of what Chichester already has to offer followed by the benchmarking of other Universities.

The highest priority recommendations identified in the report were:

To develop the nightlife and entertainment of the city.

To create more affordable shops.

This will greatly increase positive impacts of the University to the city by creating a more substantial student economy. Doing this will not only improve the experience for students at The University of Chichester (increasing its competitiveness) but also make a more entertaining location for visiting friends and relatives – further contributing to expenditure into the local economy.

Visiting Friends and Relatives

To further enhance the VFR (Visiting Friends and Relatives) engagement between the city council and the University of Chichester to work with the Business Innovation Department to showcase the city more within open days and by providing information packs on what's available for the student during their induction week, so the city businesses to benefit more from the student population. This could be done where the BID manager is notified by the University on open day's dates and also the induction week dates, so that business can create discounts and benefits to attract students (as well as their families) into the city.

Further Research

International Students

Our research only captured student data from Chichester University students, where only 2% of the student population are International Students (What Uni, 2015).

However, there is a large international community at Chichester College, who form a significant number of the student population in Chichester.

A specific survey to capture the International student voice is recommended as a recent report commissioned by the University of Sheffield recognises the benefits of international students. The research evaluated both the financial contribution and costs of international students and concluded that the net benefit to Sheffield's economy is £120 million, and to the wider region of up to £176 million. The report also suggests that 8.9% of international students in the city go on to work in Yorkshire and Humberside following graduation. (Davis, 2013). Therefore, it is worth similarly seeing how Chichester can most increase benefits from its international student population.

Employment

West Sussex County Council produced a Local Economic Assessment for West Sussex in 2010/11. This showed that the employment rate in Chichester was 80.3%, which was higher than the average for West Sussex at 76.3%. Unemployment in Chichester was estimated at 2.7%, which was much lower than the county average of 6.1%. (West Sussex County Council, 2010).

For student employment during studies, the Complete University Guide (2016), which publishes university related league tables, has identified that two thirds of students are now working part time to help fund their studies and student lifestyle. This could be due to course fees increasing. The amount of students who work part time could increase even more in September for when students are no longer permitted the maintenance grant. Creating a greater need for available part-time jobs.

In the survey students were asked on their perception of employment opportunities within Chichester, to identify whether Chichester is contributing to the student employment statistics and also providing students and graduates with work.

The survey showed that 41% of students said that there is enough employment opportunities for students looking for part-time work. However majority of students (43% of them) have not even looked for employment opportunities within the Chichester area, and from researching part time job roles within Chichester on Indeed (job advertisement page) there are 991 jobs available in the area.

Findings from the Department for Business Innovation and Skills has identified that in England the employment rate for working age graduates is 87.5% which is the highest level of employment since 2007. The unemployment rate for young graduates (3.9%) has also declined since 2007 (Vanderpant, 2015). This shows that more graduates are now getting jobs after university.

Further Research

Despite these encouraging figures, the proportion of graduates who stay in Chichester is extremely low. This would suggest that the student perception of the opportunities available in the city is limited or affected by other factors such as the lack of nightlife or the cost of housing. When asked if students believe there is enough employment opportunities for graduates, 36% of students said no, while 16% said yes.

Therefore it could be interpreted that students are not going to stay in the area because of little employment opportunities negatively impacting the economy of Chichester. As one student commented “There aren't many graduate job opportunities in the area.” Therefore more development on graduates schemes are needed within the area, which could be done by Chichester Vision Project working with the University.

A further reason is that Chichester is set in the South Downs National Park and is a very desirable place to live. However, the District Council’s own website suggests that ‘there is very high demand for housing in the district. Unfortunately, this demand for the district's housing has pushed houses prices up beyond the reach of local households’ (Chichester District Council, 2016) which includes graduates. There is a target to build 600 affordable homes between 2013-2018 (Chichester District Council, 2016). Perhaps the new homes as well as the benefits of living and working in Chichester need better promotion to the student population.

Therefore this shows that the University of Chichester should do more in engaging students with employment within the local area such as advertising the employment within the SU and social media outlets.

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Vision Case studies - Summary

The following case studies illustrate how Guildford, York, Winchester, Dorchester and Ipswich have each developed a Vision in response to the opportunities and challenges facing their town and city centres. The studies also highlight the value of creating a Vision, the progress each centre has achieved and the lessons that can be learned from their experiences.

These historic county towns and regional public sector hubs have been selected as they present a similar profile to Chichester in terms of the issues they are facing. These include:

- A reliance on a diminishing public sector.
- The need to diversify and create higher value jobs.
- The demand for new housing sites and affordable housing.
- Increased traffic congestion, resultant air pollution and parking constraints.
- A lack of spacious retail and office space.
- The need to protect, enhance and promote the town's heritage and culture.
- The impact of new developments on the character of the town centre.
- The absence of a night-time economy.
- Competition from online shopping, out-of-town retail parks and neighbouring retail centres.

While each town or city may respond to these issues in different ways, what they all agree on is that having a Vision is essential in terms of securing investment and gaining public, political and regional support. A Vision also sets out an ambition for the town and a commitment to its future.

As these case studies show, successful Vision projects build on existing strengths. For example, the development of new hotel facilities in Dorchester and the award of significant lottery funding for two of their historic museums have created a new opportunity for the development of a heritage tourism sector. However, where no such opportunities exist, those centres with a bold vision can drive change and deliver new ideas as in Guildford, where they are opening up the riverside to create a riverside community park, public spaces and new sites for retail and office accommodation. Similarly, in Ipswich, they have a bold ambition to "turn their town around" to recreate Ipswich as East Anglia's Waterfront town.

While having a Vision is important, so is delivering that Vision. Ipswich has focused on delivery from the outset, securing the commitment of the leaders of the town's authorities, key organisations, and the local MP to form a partnership which campaigns for and has delivered an impressive list of projects. These include the redevelopment of the central town square and government funding for a new innovation enterprise island. However, Winchester has adopted a different approach, creating a vision which outlines what the town wants to become for those who have the resources to achieve it.

As well as outlining an economic direction, the purpose of creating vision for each of these places is to determine what sort of place it wants to be. York's New City Beautiful vision recognised that quality of place matters to businesses making decisions about where to locate and invest; residents as a place to live; and visitors as a destination - to enjoy, learn, experience and return. That's why protecting the fabric and culture of this world-famous historic city is essential to its economic success. Although York is now focused on delivery, this ethos continues to inspire developments and activities within the city centre.

Finally, the case studies also outline the importance of good communication so that the public, politicians, businesses and all contributors to the Vision, support and understand the changes as they happen around them and are inspired by them.

Courtesy of Ipswich Central BID

The following five pages provide brief summaries of the studies into each of the comparable towns and cities

Dorchester Vision

Heritage Experience and Knowledge Economy

Dorchester is an attractive, affluent and historic county town, the home and inspiration of the author, Thomas Hardy. Three tiers of government are represented in the town including Dorchester Town, Dorset County and West Dorset District Councils. The town has two hospitals, a Land-based college and a number of heritage attractions including Dorchester Abbey, Dorset County Museum and Dorchester's historic Old Crown Court – where the Tolpuddle Martyrs were tried. Recently, these museums have attracted nearly £12 million in National Lottery Funding. Poundbury, Dorchester's famous urban extension, is due for completion in 2025.

Background

Dorchester's strengths are its heritage, attractiveness as a town centre and low unemployment. However, these strengths are also threatening what makes it special. Dorchester draws a significant proportion of its labour force from the surrounding rural areas and from Weymouth, creating significant traffic flows every day. As such, traffic and parking are major issues for the town centre. The growth in population and the continuing demand for more housing, as well as the potential for retail and tourism growth, are also putting increasing pressure on the town's infrastructure. A key priority is to deliver more affordable housing, balanced by appropriate forms of employment growth to achieve a more sustainable settlement. The public sector, health and education provide 56% of the town's employment; but this also points to a failure to grow in other sectors. While there are clear masterplans for parts of the town, for example Poundbury and Brewery Square, there has not been a coherent vision for the town as a whole to work towards.

Dorchester Vision

Dorchester's vision is contained with the **Dorchester Town Council Corporate Plan 2015-2019.** The Town Council has taken the lead in shaping a vision for the long term future of Dorchester in response to:

- the pressure on local government funding,
- the ongoing growth of the town, and
- the diminishing ability of other tiers of government to focus on local issues.

The Vision includes a summary action plan indicating short, medium and long term objectives and will be delivered either as a Neighbourhood Plan or by agreeing a Memorandum of Understanding with its key partners. The most important goal of the Town Council's Corporate Plan is to achieve recognition of its Vision by other parties in order to attract funding and political support.

The Town Council wants Dorchester to have:

- A more balanced population –providing opportunities for younger people and young families to be able to live in the town
- A vibrant community – supporting all sectors of our community
- A more varied housing mix.
- An important public sector hub – recognising the traditional role as county town and sub-regional hub.
- A more diverse economy – knowledge based small businesses enjoying a high quality of life, a better retail and night-time economy offer, a developed heritage based tourism offer.
- An infrastructure capable of coping with the demands that economic success brings.
- Respecting but taking advantage of our heritage & environment – a co-ordinated approach to tourism, active engagement to ensure that new developments complement the town's existing heritage.
- Aware of and in agreement with the long term phases of growth for the town and the area it serves to achieve the vision we need.

Projects and progress

Since consulting on the Vision, Dorchester has focused on delivering a shared vision for heritage tourism. This is to capitalise on the recent availability of new hotel accommodation in the town centre and the lottery funding award for Dorchester's historic museums. Conscious that each museum will be focused on their individual redevelopments, the heritage tourism vision will deliver a holistic approach to attracting longer staying visitors to the town.

In addition, West Dorset District Council are reassessing the options for the development of Dorchester's town centre in order to secure or improve Dorchester as an important sub-regional hub.

Learning point: Understanding your strengths

- Dorchester has looked at what its strengths are and is making them work harder for their economy - for example, heritage tourism.
- The value of having a Vision cannot be underestimated in terms of winning public and political support to address the issues facing the town's future.

Guildford Vision

"The Council will be proactive in building a great town centre which connects to the amenity of the riverside. We will invest in creating a high quality public realm. We will put people above traffic and we will promote new high quality retail and business development."

Profile

Guildford is the county town and administrative centre of Surrey. This historic town is home to Guildford Borough Council, the County Courts, Guildford Cathedral and county hospital. The town has a thriving education sector including the University of Surrey, the University of Law, Surrey Research Park and Surrey Sports Park. The public sector is the largest employer in the town, closely followed by the finance and IT sector.

Background

Guildford is an affluent area with higher than average incomes but also higher than average housing costs. It's a place where businesses want to locate and grow but face increasing problems, such as lack of affordable housing, traffic congestion and staff recruitment and retention issues. Furthermore, during the past thirty years development in Guildford stalled, despite the high demand for office and retail space, due to a lack of major new sites. Meanwhile, competing centres such as Kingston upon Thames and Woking are undertaking major growth, while local businesses, no longer able to expand, are looking to leave the area. Guildford has reached a tipping point between decline and regeneration. The challenge facing Guildford is how can it achieve its potential as a thriving economic and retail hub without losing its historic charm and attraction as a place to live, work and visit?

Guildford Vision

Guildford's response to these issues has been to create a Vision and Masterplan spurred on by a campaign initiated by the Guildford Society and Guildford Vision Group. Guildford Borough Council's Vision promises to **"protect and build on [its] assets and insist that all new development will be of the highest design and environmental standards"**

"Don't stop at the Vision, create a town centre Masterplan, identify a couple of early projects and deliver on them."

(Illustration courtesy of Allies and Morrison)

The aim of the Masterplan has been to create a positive environment for investment and identify a supply of sites for housing, retail, employment and other town centre uses including realistic timescales for delivery.

Proposals include a new riverside community park and 'streets for people' through more pedestrianised areas. Key themes include:

- Creating 'Streets for People' by redirecting traffic away from the town centre and increasing the pedestrianisation of the shopping area.
- Developing a major new riverside community park for leisure, cultural activities and commercial uses.
- Opening up new public spaces and squares throughout the town and along the riverside.
- Supporting a new leisure and entertainment focus at Bedford Wharf, the expansion of the retail offer at North Street and the enhancement of the historic quarter.
- Delivering new town centre housing.
- Providing an integrated transport hub and exchange.

Progress and projects

In 2015, the Council put in place a M**ajor Projects Unit** to assess delivery development opportunities, potential partners and innovative funding methods. As a result, the Council is actively investing in property, putting together sites to realise the Masterplan, especially in the riverside area. Early initiatives include:

- A new town centre Waitrose store with parking.
- A temporary Pop Up Village (PUV) on unused land to revitalise town centre shopping while awaiting the redevelopment of North Street.
- Traffic modelling and planned traffic trials to redirect traffic flow away from the town centre.
- A £1 million refurbishment and relaying of the High Street's historic paving 'setts'.

Learning point: Vision and political leadership

- Having a Vision and Masterplan for the entire city centre has created opportunities for inward investment and ensured a cohesive approach.
- Political ownership and leadership has proven essential in terms of driving the Vision forward and ensuring the Council stands firm in its commitment to the agreed objectives of the Masterplan .

Ipswich Vision

"Turning our town around"
East Anglia's Waterfront Town

Ipswich is the county town and administrative centre of Suffolk located on the estuary of the River Orwell. The town is home to Ipswich Borough and County Councils, the law courts, police headquarters, Ipswich Hospital, two theatres, a small university campus, art school and Ipswich football stadium. The town is famous for its medieval buildings, waterfront, collection of Constable and Gainsborough paintings and 800 acres of parkland. Major employers include the public sector followed by the finance and IT industry, with insurance companies AXA and Willis providing over 1,000 jobs.

Background

As a retail and visitor centre Ipswich faces increasing competition from out-of-town retail and business parks, as well as online shopping and competing locations at home and overseas. Currently, Ipswich is a town of two halves: the main shopping area strung out over narrow streets, with vacant stores and run-down buildings as a result of decades of lack of investment, and the newly developed Waterfront area which attracts more affluent visitors. Central to Ipswich's economic success is a successful town centre. With the Waterfront and the retail district separated by only 500 metres, the town realised that its economic survival lay in expanding the quality of experience at the Waterfront back into the town.

Ipswich Vision

The Ipswich Vision is a vision for a revived town centre. It's ambition is to create 'East Anglia's Waterfront Town' by turning the town around from an east-west to a north-south axis, reconnecting the town's two shopping and visitor centres. It also includes the creation of ten quarters – each with its own unique identity. Proposals include:

- the redesign, rebuilding and repaving of the Cornhill town square;
- encouraging the construction of new large retail units to bring in modern chain stores;
- building 2,000 new town houses and flats creating a community feel in areas to the east, west and south of the traditional town centre;
- linking the historic Christchurch Park and Tower Ramparts area to the Waterfront, and
- improving and promoting the wider town and its unique cultural offer as a visitor destination.

Learning point: Partnership and Delivery

- The Vision comes with a commitment to make it happen through an embedded Delivery Plan and a highly visible and dedicated partnership.
- Senior level political and business champions, committed to the future of Ipswich and the Vision have ensured the success of the project.

The Ipswich Vision is not simply a concept document but also a **Delivery Plan**, with a clear list of nine priorities agreed and signed up to by a partnership of Ipswich's major stakeholders. These include the **leaders** of New Anglia LEP, Suffolk County Council, Ipswich Borough Council, Ipswich Central BID, Ipswich Chamber of Commerce, The University Campus Suffolk, and the local MP, Ben Gummer. Leading business figures such as Lord Stuart Rose, also support the partnership.
As the **Greater Ipswich Partnership** they are collectively committed to delivering the 2015 Vision objectives by 2020. It is intended that the Vision will be updated bi-annually, starting in 2017, to ensure a rolling programme of development.

Progress and projects

With a focus on delivery, the Greater Ipswich Partnership has several new initiatives already underway including:

- The **redesign and redevelopment of the town's main square, The Cornhill.** The project has secured over £3 million in funding from the County and Borough Councils and New Anglia LEP. Designs are currently out for consultation.
- A "Norwich in 90, Ipswich in 60" campaign which aims to **speed up services to London** on the Great Eastern Main Line.
- **New car parking** in the town centre funded by Ipswich Borough Council.
- The completion of the £**4m re-vamp** of Ipswich's Tower Ramparts Shopping Centre, renamed 'Sailmakers', which has attracted major new stores to the town and over 5 million visitors.
- Government go-ahead and funding for **a new wet dock crossing** to help cut traffic gridlock and create an 'Enterprise' island. This scheme will be a catalyst for economic growth worth more than £8billion to the local economy.
- **Funding secured** from the Coastal Revival Fund to help regenerate the derelict sites adjacent to the Waterfront.

"The most important factor about the Vision is that, firstly, the town centre has one. Secondly, the organisations that will deliver it are all signed up to it." Paul Clement, CEO, Ipswich Central

Winchester Vision

"to be a thriving county town, worthy of its name."

"It's not a plan, it's a guide – a vision for the things we want to achieve. Its aim is to guide policy makers, planners and all who can and will shape our town[1]."

Profile

Named as the best place to live in Britain, Winchester is the county town and administrative centre of Hampshire. The city is renowned for its history, heritage and setting and is home to Winchester Cathedral, theatre and museum. The University of Winchester and Winchester School of Art are also based in the city, as are Winchester City and Hampshire County Councils, the Crown and County Courts, the Police Headquarters, Prison and the local NHS Healthcare Trust. The Winchester BID began its second term in April 2013.

Background

The challenge for Winchester has been and remains the ability to 'absorb and manage change without losing its special character.'[2] New development proposals to meet the demand for larger retail/office space and city centre housing have sparked extensive public debate, legal interventions and opposition. The Council has been criticised for not having a clear vision for developments such as Silver Hill, and for not clearly communicating its vision internally and with the public - as a result losing the public's trust. However, Winchester faces many challenges including: traffic congestion; a decline in funding of the public sector; competition from other regional centres; the threat of businesses relocating due to a lack of suitable office space and the need to diversify its economy to create higher value jobs. Therefore the issue of how to evolve Winchester for the future and secure its economic prosperity while still retaining its essential character lies at the heart of the Winchester Vision.

Winchester Vision

The Vision is owned and championed, but not implemented, by **Winchester's Town Forum.** It is intended as a guide and reference document for policy makers at the City Council and elsewhere. The Town Forum uses it to influence debate and decisions regarding the town centre. It is not an action plan or a masterplan; its aim is to encourage those organisations with budgets and the ability to achieve change to do what is set out in the Vision.

[1] A Vision for Winchester 2012-2017
[2] Future of Winchester Study WCC June 1999

The Vision was last updated in 2012 and sets out eight themes or aspirations for the town centre together with 70 actions:

1. encourage people to create economic prosperity;
2. care for our history, heritage and setting;
3. be a natural destination for visitors and shoppers;
4. provide new and affordable housing;
5. improve transport, infrastructure and air quality;
6. be a regional centre for creativity and culture;
7. create a green and environmentally friendly city; and
8. be a town that supports safe and stable communities.

Progress and projects

The 2012-2020 Vision points to the following initiatives influenced by the publication of the 2007 Vision:

- The opening of the Discovery Centre.
- A new athletics stadium developed in partnership between the City Council and the University of Winchester.
- The relocation and building of the new Trinity Centre.
- A new centre for an Emmaus project.
- Major new facilities on the University of Winchester campus.
- Repaving of the High Street and the Square in the city centre.
- New retail and community service provision in Weeke.
- The opening of the South of Winchester park and ride.
- Major new facilities at the Royal Hampshire County Hospital.
- 800 homes built within the town wards.

A recent design competition and procurement plans to develop the Station Approach site in Winchester have been abandoned following complaints leading to a review by the Overview and Scrutiny Committee.

Learning point: Communication and Ownership

- The City Council's reputation is now damaged as a result of two failed design proposals.
- Residents and politicians are demanding developments that express the character of Winchester.
- As the Silver Hill independent review reported - having an overall agreed vision, political buy-in and good communication with the public will be key to Winchester's future growth.

York Vision

"a vision beyond traditional economic or urban design development strategies – one demonstrating future economic success and well being **through investment in the city's quality of place."**

Profile

Topping a recent poll as the most beautiful city in Britain, medieval York has a wealth of historic, cultural and sporting attractions. These include: York Minister, the Jorvik Viking Centre, York Art Gallery (recently re-opened after an £8 million redevelopment), the National Railway Museum and York racecourse. As the county town and administrative centre of Yorkshire the city is home to York Council, the County and Crown Courts and York Hospital. In addition, it has a thriving education sector with two universities and a science park hosting businesses in the creative, digital media, bioscience and IT technology sectors. In 2014, York became a designated UNESCO City of Media Arts and aims to become the UK's first Gigabit city by 2017.

Background

Despite having the highest skill levels of any city in the North, York's wages fall below the national average due to the predominance of low value sectors such as tourism and retail. Furthermore, the lack of spacious Grade A office accommodation together with severe traffic congestion, has limited business expansion and opportunities for inward investment from companies offering higher value jobs. Increasing demand for larger retail space has led to a rise in out-of-town retail development and competition from centres such as Leeds, Harrogate, Newcastle and Manchester. York's response and ambition is to become bigger economically by ensuring the availability of city centre sites to meet the demand for high quality business space, retail development and housing. However, York's heritage is both an asset and a challenge. The danger is that if new developments are carried out badly and affect the city's character, it could deter those businesses it wishes to attract.

York Vision

'York – New City Beautiful – toward an economic vision', was a study created in 2010, which examined the economic potential of the city. It also considered how various major development projects at different sites across the city could be pulled together into a coherent strategy.

Learning point: Protecting the past – inspiring the future

- York recognises that protecting the fabric and culture of this world-famous historic city is essential to the city's economic success.
- Although developed in 2010, the New City Beautiful Vision continues to influence and inspire York's Local Plan, Economic Strategy and the masterplan for York's new urban quarter, York Central.

The Vision reflected that quality of place:

- matters to businesses making decisions about where to locate and invest;
- matters to residents as a living place and a place to live; and
- matters to the visitor - to enjoy, to learn, to invest and to return.

The Vision also outlined an economic direction for York, as a pioneer and innovator in culture, conservation, media arts, bio-science and agriculture and knowledge based industries.

Proposals included:

- Ensuring that York's portfolio of development sites and areas including: Castle Piccadilly, University of York, British Sugar, Nestle South, Terry's and Monk's Cross were developed in keeping with York's aspiration to become a New City Beautiful.
- Redefining York's transportation infrastructure in order to get York moving.
- Ensuring that York Central (a major brownfield site around the railway station) was carefully developed as a new piece of the city.
- Reconnecting the University of York and the countryside to the walled city – The Great Street.
- Making more of the two city's rivers.
- Creating a connected system of parks to transform the ways in which people used and experienced the city – A City of Parks.
- Enhancing the quality of the city centre's public realm order to remain attractive and competitive.

Progress and projects

- In 2012, York City Council approved a £3.3 million investment across six city centre locations in order to enhance the quality of the city's public spaces. Three out of the six projects were completed prior to a change of administration.
- The Council also launched the Treemendous initiative which involved planting 50,000 trees to enhance the city environment.
- Plans to develop an out of town retail centre and Community Stadium at Monk's Cross were also approved. However, with out-of-town floor space now exceeding that contained within the city, the focus has turned to the renaissance of city centre retailing and the development of its largest brownfield site, York Central. This project represents a unique opportunity to deliver new housing, business accommodation and modern retail units in York, as well as an enhanced National Railway Museum.
- In November 2015, the York BID was established with a fund of £4 million assuring continued investment in the city centre