MOWBRAY, HORSHAM

RETAIL IMPACT ASSESSMENT UPDATE

11 NOVEMBER 2025

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1.0 INTRODUCTION

1.1 This Retail Impact Assessment Update responds to consultation responses received in relation to a request in writing for a S106 amendment (Ref. S106/25/0013 / 'the Application'), submitted to Horsham District Council ('the Council') on 18th July 2025. The request seeks to amend Schedule 14 of the S106 Agreement for Planning Permission Ref. DC/16/1677 at the Mowbray Development Site ('the Development'), Land North of Horsham, Horsham ('the Site') to confirm the scale and type of retail floorspace that is available to operators.

1.2 Outline Planning Permission Ref. DC/16/1677 ('the OPP') was approved by the Council on 1st March 2018 for the following development:

> *"Outline planning application with all matters reserved except access for a mixed use strategic development to include housing (up to 2,750 dwellings), business park (up to 46,450 m2), retail, community centre, leisure facilities, education facilities, public open space, landscaping and related infrastructure."*

1.3 The Permission was subject to a S106 Agreement dated 01 March 2018. Schedule 14 sets out the obligations in relation to the approved retail uses by reference to the total amount of gross internal retail (GIA) floorspace.

1.4 The request has been submitted to amend the provisions within Schedule 14 to allow for up to 6,400 sq. m of net sales (not GIA) area within the Development, and that no unit shall exceed 6,000 sq. m net sales (not GIA) area. This will provide certainty to the developer and potential future retail tenants of the quantum of permitted retail floorspace so that tenants can be secured and the floorspace can be delivered.

1.5 A Retail Impact Assessment ('RIA') was prepared by Montagu Evans and submitted with the request in writing to amend the S106. The Council has received a number of comments from local stakeholders, including Cube RE, the owners of Swan Walk Shopping Centre in relation to the request. The Council have also obtained advice on the RIA from Placechanger. The points raised include:

- Criticisms of the evidence base used to inform the RIA, including the age of the household survey and choice of benchmark sales densities;
- Concerns with providing circa 6,000 sq. m of retail uses at Mowbray;
- Concerns with the potential impact on Horsham Town Centre and, in particular, Swan Walk Shopping Centre; and
- Concerns that the proposed variation will result in uncontrolled retail floorspace at Mowbray.

1.6 This Update ('RIA Update') addresses the points raised by consultees and updates the quantitative assessment submitted with the request in writing utilising a more up-to-date evidence base. This update continues to demonstrate that the proposed variation to allow for 6,400 sq. m of net retail sales floorspace will not lead to any impacts on existing centres or on planned investment to a level that could be considered to be 'significantly adverse', which is the key policy test set out in the National Planning Policy Framework (NPPF).

1.7 This RIA Update concludes that 6,400 sq. m of net sales floorspace at the Site is acceptable, and the proposed amendment to Schedule 14 should be approved.

2.0 THE RETAIL CONTEXT

2.1 The Mowbray Development Site incorporates a range of retail uses to support a new sustainable community and serve the day-to-day needs of those living and working in Mowbray. A summary of the evolution of the proposed retail element of the Development is set out below.

SITE ALLOCATION

2.2 Policy SD1 of the Horsham District Planning Framework adopted in 2015 (the 'HDPF') sets out the overarching site allocation for the Mowbray Development Site for a mixed-use strategic development to accommodate at least at least 2,500 homes and associated infrastructure and facilities. This includes a Local Centre comprising a mix of uses, including shops, healthcare and community facilities.

2.3 Policy SD3 relates specifically to the Local Centre and states that it will include the following, alongside sufficient healthcare provision and a multi-use community centre:

> *"Retail provision of no more than 6,000m2 sales floorspace together with other appropriate local shopping facilities subject to it being demonstrated that there would not be a significant adverse impact on Horsham town centre."*

2.4 Paragraph 7.11 of the explanatory text to Policy SD3 further sets out the following:

> *"To assist in meeting the community and retail needs of the new community, it is considered that a retail food store with a sales floor space area of no more than 6,000m2 should be provided as part of the Local Centre. Other local retail shall be provided, as required, in other appropriate locations within the development, to meet everyday needs. The Local Centre should not detract from the vitality and viability of Horsham town centre."*

2.5 It is clear from Policy SD3 and Paragraph 7.11 of the HDPF that the site allocation is for 6,000 sq. m net sales floorspace, not gross internal area, and that local retail uses shall be provided **in addition** to this amount.

ORIGINAL MOWBRAY DEVELOPMENT RETAIL IMPACT ASSESSMENT

2.6 The OPP planning application was supported by a Retail Statement (June 2016) prepared by Peter Brett Associates, which included a detailed retail impact assessment ('the OPP RIA'). It is industry standard to apply sales densities to net sales areas for the purposes of assessing retail impact. Accordingly, Table 9a of the OPP RIA at Appendix E of the OPP Retail Statement sets out the proposed floorspace and estimated turnover. This is based on two food stores: one of 3,400 sq. m and one of 1,500 sq. m net sales floorspace, in addition to 1,200 sq. m net sales floorspace of local shopping facilities. This produces a total of 6,100 sq. m net retail floorspace. Table 9a is provided at Figure 2.1 below.

Table 9a - Turnover of proposed floorspace in 2021

		Convenience goods				Comparison goods				Total
Format	Net floorspace (sqm)	Convenience floorspace %	Convenience floorspace (sqm)	Turnover per sqm £	Turnover £m	Comparison floorspace %	Comparison floorspace sqm	Turnover per sq.m £	Turnover £m	**Total turnover £m**
Foodstore	3,400	70	2,380	12,321	29.3	30	1,020	9,500	9.7	**39.0**
Foodstore	1,500	70	1,050	9,000	9.5	30	450	5,100	2.3	**11.7**
Local Shopping Facilities	1,200	0	0	0	0.0	100	1,200	4,500	5.4	**5.4**
TOTAL	6,100	-	3,430	-	38.8	-	2,670	-	17.4	**56.2**

Source: PBA assumptions based on format of development
2014 Prices

Figure 2.1: Appendix E Table 9a Land North of Horsham Retail Statement, prepared by Peter Brett Associates

2.7 It is evident from Table 9a that the acceptability of the retail floorspace within the Development was assessed on the basis of net floorspace – not gross internal area. The OPP Retail Statement concluded that the Development, as set out within Table 9a, would not have a significant adverse impact on Horsham Town Centre, or any existing, committed or planned public or private investment.

2.8 Paragraph 5.4.1 of the OPP Retail Statement is clear that the figures set out within Table 9a relate to net sales floorspace. It also confirms that the local shopping facilities will comprise 1,500 sq. m gross retail floorspace. A gross floorspace figure is not provided for the floorspace for the two foodstores – only a total sales area of 4,900 sq. m.

2.9 Therefore, at the submission stage of the OPP, it was assumed that the total retail net floorspace was 6,100 sq. m.

OPP COMMITTEE REPORT

2.10 The Committee Report for the OPP acknowledged that the Council's Retail Study identified a qualitative deficiency in convenience provision in the North Horsham area and found that there was capacity for additional retail floorspace. It also confirmed that the proposed scale of retail floorspace within the Development accorded with the allocation for the Site. On that basis of the OPP RIA, it was considered that the proposed retail aspects of the Development were appropriate and acceptable.

2.11 In relation to floorspaces, Paragraph 6.101 sets out the following:

> *"The application proposes a total of 6,400 sqm of retail floorspace (Use Class A1). Of this, 4,900 sqm is shown as food retail floorspace (anticipated to be broken into two stores of 3,400 sqm and 1,500 sqm) plus 1,500 sqm of local retail units. This level of larger scale and local level shopping facilities accords with Policy SD3, provided that it is demonstrated that there would not be any significantly adverse impact upon Horsham town centre."*

2.12 Paragraph 6.101 refers to a figure of 4,900 sq. m of foodstore floorspace, without stating whether this was GIA or net sales area. As set out above, this was the net sales area in the OPP Retail Statement. However, it also refers to 1,500 sq. m of local level shopping facilities, which was set out in the OPP Retail Statement as gross floorspace. It is therefore evident that the total of 6,400 sq. m retail floorspace relates to the sum of two different floorspace definitions – 4,900 sq. m of net floorspace plus 1,500 sq. m gross floorspace.

CURRENT S106 AGREEMENT

2.13 The OPP was granted subject to a S106 Agreement dated 01 March 2018. Schedule 14 sets out the obligations in relation to the approved retail uses and states:

> *2. The Owners covenant with the district Council that unless otherwise agreed in writing:*
>
> *2.1 no more than 6,400 square metres (gross internal area) of retail floorspace within the Development shall we used for Retail Uses;*
>
> *2.2 No Retail Unit shall be greater than 6,000 square metres (gross internal area) in retail floorspace; and*
>
> *2.3 At least one Retail Unit will be provided in accordance with the following:*
>
> *2.3.1 within the local centre*
>
> *2.3.2 will be a minimum of 150 square metres (gross internal area) in retail floorspace; and*
>
> *2.3.3 shall only be used for a use within Class A1 of the Town and County Planning (Use Classes) Order 1987*

2.14 Clause 2.1 refers to a maximum of 6,400 sq. m GIA. This appears to have followed through from the figure in the Committee Report, which relates to the sum of a gross floorspace figure and a net floorspace figure.

2.15 When taking into account the back of house floorspace typically required to support retail uses it is clear that the Development, as set out and assessed in the OPP Retail Statement, would have allowed a much larger gross internal area than 6,400 sq. m.

PROPOSED VILLAGE CENTRE APPLICATION

2.16 A reserved matters application was submitted in June 2025 for a Village Centre for the Mowbray Development Site (ref. DC/25/1018) ('the Village Centre RMA'). The Planning Statement sets out that the Village Centre will comprise 753 sq. m gross internal area of flexible retail, leisure, commercial, café and restaurant floorspace (Use Classes A1, A2, A3, A4, A5, B1 and D1). These use classes now fall within Class E and sui generis. Table 3 indicates that this flexible floorspace will be delivered in five small units with a total net sales area of 649 sq. m.

2.17 The proposed Village Centre therefore allows for up to 753 sq. m gross floorspace to be used for retail. However, the proposed floorspace comprises flexible uses and it is anticipated that some floorspace would be occupied for other uses, rather than solely retail.

2.18 The Applicant has confirmed that the quantum of retail floorspace within the Village Centre can be restricted appropriately to ensure that the total amount of floorspace used for retail uses, along with any other retail units that come forward within the Development in future reserved matters applications, do not exceed the restrictions within Schedule 14.

PROPOSED S106 AMENDMENT

2.19 The request in writing seeks to vary Schedule 14 of the OPP S106 Agreement as follows:

- Amendment of the definition of “Retail Use” to Class E(a) to update the uses in line with the current Use Class Order.
- Amendment of the measure for the floor area restrictions from “gross internal area” to “net sales area”.

2.20 Schedule 14, as varied, would restrict the Development as a whole to no more than 6,400 sq. m net sales area of retail floorspace and ensure that no retail unit is greater than 6,000 sq. m net sales area.

2.21 It should be noted that the OPP Retail Statement assessed a total net sales area of 6,100 sq. m and therefore this Application represents a minor uplift of 300 sq. m in retail floorspace compared to the scheme set out within the OPP Retail Statement.

2.22 This RIA Update demonstrates that modifying the floorspace contained in Schedule 14, as set out above, would not result in any significant adverse impacts.

SUMMARY

2.23 The retail floorspace restrictions within Schedule 14 of the S106 Agreement do not align with the amount of retail floorspace that was assessed and found to be acceptable within the OPP Retail Statement.

2.24 The OPP Retail Statement demonstrated that 6,100 sq. m of net retail sales floorspace would not have a significant adverse impact on Horsham Town Centre, or any public or private investment, in line with Paragraph 95 of the NPPF. It was on this basis that the OPP was granted planning permission. The difference in the total quantum of floorspace between the consent and the proposed amendment is minimal at 300 sq. m.

2.25 This RIA Update provides a robust assessment and seeks to demonstrate to the Council that varying the current restriction to allow 6,400 sq. m of net retail sales floorspace within the Development, including a retail unit of up to 6,000 sq. m net sales area, would continue to ensure that there will be no significant adverse impacts.

2.26 Importantly, the Development will continue to align with the site allocation set out within Policy SD3, which allows for a single store with up to 6,000 sq. m of sales floorspace, in addition to local shopping facilities.

3.0 CONSULTATION COMMENTS

3.1 The Application has received consultation comments, including from Cube RE, the owners of Swan Walk Shopping Centre, Horsham Town Centre. The Council have also obtained advice on retail matters from Placechanger.

3.2 In the main, the matters raised cover the same points. However, for completeness, we address the comments of Placechanger and Cube RE separately below.

PLACECHANGER

3.3 Placechanger are consultancy with a background in advocating for town centres and acting as a member of Planning Committee. They have provided comments in respect of the RIA and the nature of the retail floorspace within the Development.

3.4 It should be noted that Placechanger is not a specialist retail planning consultant and that their advice is not based on a quantitative assessment. Instead, their advice is purely anecdotal with little to no empirical evidence and there is no reference to or acknowledgement of the established base position, i.e., that the OPP already allows for retail uses at Mowbray and a single retail unit of up to 6,000 sq. m. gross internal area.

TOWN CENTRE HEALTH

3.5 The Placechanger Appraisal ('the Appraisal') is informed by an ad hoc survey of shoppers in Horsham Town Centre. The Appraisal confirms that Horsham Town Centre "*appears both vital and viable with flourishing retail and leisure offers being utilized*" and that shoppers were positive about the town centre.

3.6 Paragraph 018 of the PPG states that "*a judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances*". The observations of Placechanger on the vitality and viability of Horsham Town Centre provide useful context to understand the current local circumstances.

3.7 Paragraph 006 of the PPG sets out a range of indicators of town centre health, including diversity of uses and proportion of vacancy property. Montagu Evans has undertaken an up-to-date health check assessment of Horsham Town Centre, based on a site visit and industry standard information sources and assessing it against the parameters set out by the PPG (see **Appendix 4.0** and Section 4 of this report).

3.8 The findings of Placechanger and the Montagu Evans health check are consistent; indicating that Horsham Town Centre is very healthy, with a diverse mix of retailers and very low vacancy rate. It is within this context that retail impact must be considered.

RETAIL NEED

3.9 The Placechanger Appraisal suggests that there is no 'need' for a retail development of 6,400 sq. m at Mowbray. They go on to say: "*one of the fundamental considerations in this appraisal; is a larger retail facility necessary for the Mowbray site to serve its community?"*

3.10 It is important to note that, whilst 'need' is a consideration for the preparation of development plans, the 'need' for retail development is not a policy test for considering planning applications. Therefore, this Application is not required to demonstrate need, although the requirement for retail floorspace has clearly already been established by the site allocation. The NPPF confirms that retail floorspace is acceptable outside of town centres where the sequential test and impact test are passed, which the RIA and RIA Update have addressed.

3.11 Land North of Horsham has been an adopted site allocation since the Horsham District Planning Framework 2015 ('the HDPF'). The HDPF underwent a rigorous process of consultation and examination in public by the Planning Inspector. This established the principle of delivering a retail development of 6,000 sq. m sales floorspace plus local shopping facilities to support the new allocated neighbourhood. Further, the OPP considered the case for 6,100 sq. m net sales area and found it to be acceptable.

3.12 The need for the allocated retail floorspace to support the new local community has therefore been thoroughly considered and established through the local plan process (the NPPF requirement) and further tested at the application stage.

3.13 The Development will deliver a mixed-use strategic urban extension of Horsham, which will provide up to 2,750 homes, a business park, two primary schools and a secondary school, early years provision, a multi-use community centre, open space, sport and recreation facilities, allotments, a cemetery, and commercial leisure facilities. The site allocation and OPP include over 6,000 sq. m of retail floorspace because it is fundamental to creating a sustainable community, providing necessary infrastructure within walking distance to serve new residents of Mowbray.

VALIDITY OF RIA

3.14 Placechanger have criticised the previous RIA for not taking inflation into account. This assertion is incorrect. The previous RIA and the RIA Update provided at **Appendix 1.0** have been adjusted in line with the latest assumptions regarding expenditure growth and retail forecasts, adopting an appropriate price base, as set out in the most recent Experian Retail Planner Briefing Note (No. 22, March 2025). This allows for inflation. This is the standard industry approach used by major retail planners and independent retail advisors in England.

3.15 The Appraisal lists a range of factors that have influenced past, present and future retail trends. Relevant growth factors obtained from the Experian Retail Planner Briefing Note have been applied to the RIA. These take into account all of the economic trends highlighted by Placechanger, including the impacts of Brexit and the Ukraine war, the Covid pandemic, the growing proportion of online retail purchases, and business rate and rental costs.

3.16 Placechanger note that Experian population projections are lower than as assessed in our RIA, which utilised, inter alia, the same projections as the OPP RIA. Therefore, we have updated the RIA using an up-to-date evidence base, including population and expenditure data from 2024. This is discussed in further detail in Section 4, alongside the conclusions of the updated RIA.

3.17 The Appraisal questions the benchmark sales density applied to the foodstore floorspace within the RIA. The RIA applies an average sales density of the seven major foodstore operators from Global Data, which is a standard industry approach for speculative applications.

3.18 Placechanger suggest that the Lidl sales density should not be included because the retailer would not take a unit of 6,000 sq. m. It should be noted that, similarly, Aldi would not take a unit of that size. Aldi have the second highest convenience sales density, and therefore removing Aldi and Lidl from the average sales density would

not materially change the sales density applied. Therefore, the sales density applied represents a reasonable convenience average.

3.19 Notwithstanding the above, the existing and proposed S106 Agreements allow flexibility in the retail development, allowing a single larger store or multiple smaller units, which could be occupied by Lidl or Aldi. Therefore, the sales density applied is appropriate for the purposes of assessing the proposed variation. However, we have included a sensitivity test of our assessment by removing both retailers and adopting a rebased benchmark at **Appendix 2.0**.

3.20 Placechanger suggest that the resulting gross internal area of the retail development could be much larger than 6,000 sq. m when taking into account back of house floorspace. Retail impact is assessed by applying published sales densities to the proposed net sales area of a retail unit. An increase in back of house floorspace would not increase the turnover of the store or the impact of the store on town centres.

3.21 Notwithstanding the above, the Applicant will agree to a restriction of 7,500 sq. m gross internal floorspace for a single retail unit alongside the proposed net sales areas to provide comfort to the Council that a significantly larger store with extensive back of house floorspace is not delivered on the Site. This proposed gross floorspace cap represents a conservative net to gross ratio of 80%.

TOWN CENTRE RETAILERS

3.22 Placechanger have raised concerns that the proposed S106 variation could result in a major retailer vacating the Town Centre. Schedule 14, as existing, allows a store up to 6,000 sq. m gross internal area. The proposed variation does not increase the risk of a town centre retailer relocating, as it only represents a small uplift in floorspace as the majority of the floorspace is already consented on the Site, as stated above.

3.23 The Appraisal also postulates that only current Horsham Town Centre retailers would want a store of 6,000 sq. m net sales area, and that no other retailers would be interested in occupying the floorspace. This implies that allowing the proposed variation would directly cause a retailer to vacate Horsham Town Centre. A range of retailers could take a store of this size, including all four major supermarkets. Moreover, there is no minimum restriction on size or format of the retail floorspace, and it could therefore come forward in multiple smaller units, subject to local demand, meaning that any retailer could occupy the floorspace.

CUBE RE

3.24 Cube RE ('Cube') are the owners of Swan Walk Shopping Centre in Horsham Town Centre and submitted consultation comments on 4th September 2025.

3.25 Cube similarly confirm that Horsham Town Centre is currently a very healthy centre, with a low vacancy rate and that it currently out-performs its catchment. Again, any impacts arising from the proposed variation must be considered against this backdrop.

GROSS INTERNAL FLOORSPACE

3.26 Cube have suggested that the proposed variation from gross internal area to net sales area could result in the retail provision within Mowbray doubling. This is unrealistic. Typically, retailers actively seek to maximise efficiency balanced with offering an appropriate customer experience. Again, the majority of this floorspace is already consented on the Site and has been accounted for within the Development Plan.

3.27 In any event, the Applicant will agree to a restriction of 7,500 sq. m gross internal floorspace for a single retail unit alongside the proposed net sales area restriction. This will ensure that the retail element of the Development will not materially increase in size as a result of the proposed variation. In addition to the proposed net floorspace restriction, this means the Council will have control over two different measures of retail floorspace, increasing their control over retail uses at Mowbray.

3.28 Cube have also stated that the change from gross internal to net sales area would not be appropriate and adds ambiguity to the permission, as back of house floorspace could be converted to sales floorspace in future without planning permission. This is incorrect.

3.29 Net sales area is an established retail industry term and includes all floorspace used for the sale and display of retail products, including checkouts, fitting rooms and circulation space. It excludes storerooms and staff facilities that shoppers are excluded from. The term is used by local authorities throughout the UK in planning conditions and obligations to control out-of-centre retail floorspace. It therefore represents an appropriate and measurable control for the quantum of sales floorspace that is permitted by a planning permission.

3.30 The proposed wording of Schedule 14 will ensure that back of house floorspace cannot be converted to retail sales floorspace in future, as doing so would be in breach of the legal agreement. The proposed wording therefore ensures that the retail floorspace at the Site will continue to be restricted and will not have a detrimental impact on the Town Centre. Approval would be required to increase the quantum of net sales area above 6,400 sq. m, or 6,000 sq. m in single unit. By applying a net sales restriction, it gives the local planning authority greater control over the use of the site.

IMPACT ON HORSHAM TOWN CENTRE

3.31 Cube have undertaken their own assessment of demographics and consumer spending in Horsham Town Centre. This assessment found that the Town Centre 'thrives' and benefits from a low vacancy rate and affluent shopper profile, with high-income consumers who visit frequently and have a high annual spend. The result of their assessment is that Horsham Town Centre 'out-performs' it's expected catchment area.

3.32 As set out in Paragraph 018 of the NPPG "*a judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances*". Paragraph 018 also explains that high vacancy rates would indicate that a centre is more susceptible to impacts.

3.33 The findings of the Cube assessment, as well as Montagu Evans' own detailed health check, corroborate Placechanger's observations that the Town Centre is very healthy with a low vacancy rate. All parties agree on this matter. This evidence indicates that Horsham Town Centre is resilient to changes in the retail market.

3.34 Notwithstanding the observed low vacancy rate, Cube note a lack of local demand for large retail units, suggesting that this is cause for concern. This indicates that a single large retail unit at Mowbray would not compete with demand for smaller units in the Town Centre. In any event, the proposed variation to the single unit floorspace restriction is not expected to directly result in detrimental consequences for the Town Centre.

3.35 Cube explain the impact that the loss of an anchor tenant could have on Horsham Town Centre. It should be noted that the Application is speculative and the existing and proposed S106 restrictions allow a flexible approach to the delivery of retail floorspace at Mowbray. The Site benefits from an existing planning permission (the OPP) for a large-scale retail unit. The proposed variation will not change that principle. The identity of the tenant is not a planning consideration because the planning permission is not personal to a specific operator.

3.36 Cube raise concerns with the potential impact of the Mowbray Development on Horsham Town Centre in general, suggesting the Development will reduce the catchment of the Town Centre and have a direct negative impact. However, they have not provided any empirical evidence to support this assertion.

3.37 The purpose of this RIA is not to consider whether 6,400 sq. m gross internal floorspace of retail uses is acceptable. This has already been established by the OPP and the accompanying S106 Agreement. It only considers whether the proposed minor uplift in retail floorspace is acceptable.

3.38 The Site is allocated by Policies SD1 and SD3 of the HDPF for the delivery of a new neighbourhood north of Horsham. This allocation established the principle of 6,000 sq. m net sales area plus local shopping facilities at the Site. The OPP RIA modelled the impact of 6,100 sq. m net sales floorspace on Horsham Town Centre. The OPP RIA confirmed that the impacts arising from the approved Development, including trade being diverted from Town Centre stores to Mowbray and changes in shopping patterns within the catchment area, are not significant and will not have adverse effects on the health of the Town Centre. The OPP was approved on this basis.

3.39 Cube correctly point out that the impacts associated with the proposed variation are only marginally higher than the impacts assessed in the OPP RIA. This is because the OPP RIA assessed a total of 6,100 sq. m net sales floorspace, whilst the updated RIA assesses 6,400 sq. m net sales floorspace, representing an uplift of only 300 sq. m. The small difference in impact is a result in the small difference in the proposed retail floorspace compared to that assessed by the OPP RIA and found to be acceptable.

3.40 This RIA Update also assesses the proposed quantum of retail floorspace compared to the fallback position, i.e. 6,400 sq. m gross internal area. The fallback position represents a lower quantum of retail floorspace than assessed by the OPP RIA and the comparison provides a robust assessment of the additional impacts arising from the proposed variation. This is set out in more detail in Section 4 and similarly demonstrates that the difference in impacts of the proposed and approved retail floorspace is minimal.

RIA EVIDENCE BASE

3.41 Cube question the currency of the population and expenditure data utilised in Montagu Evan's RIA, which replicated the OPP RIA. As stated above, we have obtained the most up-to-date population and expenditure data (2024) and updated the RIA on this basis. We have also included the projected population of the Mowbray Development. This approach is in line with the OPP RIA, which was reviewed and found to be appropriate, and permission was granted on this basis.

3.42 Cube question the use of the Council's household survey data (undertaken in 2016 as part of the Horsham Town Retail & Leisure Study 2017). We have obtained up-to-date household survey data that was undertaken and published in 2024 to provide recent information on shopping patterns within the study area. Further details are provided within Section 4 and an updated RIA is provided at **Appendix 1.0**.

3.43 Similarly, the health check was updated as part of the previous RIA and the findings have been corroborated by Cube and Placechanger. This allows the impacts arising from the Development to be appropriately considered within the context of local circumstances.

3.44 Cube have criticised the use of an average convenience sales density including the top seven convenience retailers. They suggest that Lidl should not be included in the average due to its lower sales density. They also suggest that Tesco's sales density should be used as an alternative. As mentioned above, using sector average sales densities is an industry standard approach for speculative applications. Moreover, both the existing and

proposed S106 restrictions would allow multiple smaller stores to be delivered at Mowbray, which could be occupied by Lidl.

3.45 All of the above is the standard and accepted approach to undertaking RIAs across the UK and to follow the Cube recommendations would diverge from accepted practice that has been stress tested at call-in/appeal and judicial review over many years.

3.46 The updated RIA also takes account of the approved Broadbridge Depot development (Planning Permission Ref. DC/23/1133). Further details are provided within Section 4.

TRADE DIVERSIONS

3.47 Cube question the trade diversion assumptions within the RIA. Trade diversions are a matter of professional judgement. The zonal trade draws of the Development are in line with those assessed and agreed in the OPP RIA, whereby the majority of trade will be drawn from Zone 1 of the Study Area. Similarly, the trade diversions from existing stores are broadly in line with the OPP RIA but have been adjusted to take into account the opening of new foodstores (e.g. Aldi, Tanbridge Retail Park). Therefore, the estimated trade draw of the Development is entirely appropriate and consistent with the OPP RIA already approved. Cube have not provided any imperial data or alternative trade diversion tables to justify this claim.

3.48 Paragraph 015 of the PPG confirms "*as a guiding principle impact should be assessed on a like-for-like basis in respect of that particular sector (e.g. it may not be appropriate to compare the impact of an out of centre DIY store with small scale town-centre stores as they would normally not compete directly). Retail uses tend to compete with their most comparable competitive facilities*." This means that developments will draw trade from like-for-like facilities, including in terms of distance, store format, retail offering, location and catchment area.

3.49 The retail floorspace within the Development will compete primarily with other out-of-centre facilities, which will be more similar in format than Town Centre stores, which cater for shoppers visiting the Town Centre also for other reasons, such as leisure, F&B and other services.

3.50 On this basis, the estimated 27% convenience diversion and 37% comparison diversion from Horsham Town Centre are considered to be robust figures based on existing Town Centre and out-of-centre provision within Horsham.

3.51 The estimated diversion from 'elsewhere' is actually lower than assessed and agreed in the OPP RIA. Therefore, this figure is also considered robust. This includes trade currently being spent in locations outside of Horsham, including Crawley and other neighbouring towns. It also takes into account the fact that the retail floorspace at Mowbray will be supported by expenditure from new Mowbray residents who are currently living outside of the area.

CONCLUSION

3.52 Montagu Evans, Placechanger and Cube are consistent in their view on the health of Horsham Town Centre: a very healthy, town centre with low vacancy rate, a wide diversity of uses, and strong vitality and viability. This indicates that, in principle, Horsham Town Centre is resilient to change in the retail market and, particularly, to impacts from out-of-centre development.

3.53 The HDPF site allocation establishes the principle of retail at the Site and specifically references 6,000 sq. m sales area. The OPP RIA assessed a total of 6,100 sq. m of sales area and nonetheless granted planning permission for 6,400 sq. m retail floorspace GIA. The applicant is not required to justify the need for retail floorspace or justify the impact of the floorspace that has already been permitted within the existing OPP S106 Agreement.

3.54 The RIA has been updated utilising population and expenditure data obtained from 2024 and shopping pattern information obtained from a household survey undertaken in 2024. Together with the health check assessment undertaken in May 2025, this presents a robust and up-to-date assessment of the impacts arising from the retail floorspace, as proposed by the variation to Schedule 14. The RIA utilises industry standard approaches and data sets for assessing the retail impact of the proposals on Horsham Town Centre which are technically robust.

3.55 This Application only seeks a variation to an existing planning permission to allow a small uplift (300 sq. m) to 6,400 sq. m net sales area compared to 6,100 sq. m net sales area previously assessed by the OPP RIA. The updated RIA confirms that when taking into account the additional 300 sq. m net sales area, as well as past and present economic conditions, such as the Covid pandemic, the rise in online shopping, and other national and global economic pressures, the impacts arising from the Development remain low and acceptable.

3.56 Even when compared to the fallback position (i.e. the OPP S106 Agreement), the difference in impact on Horsham Town Centre is minimal. It has been concluded that the proposed variation will not amount to a ‘significant adverse impact’, which is the key policy test set by Paragraph 95 of the NPPF.

3.57 This is a speculative application that is required to clarify the total amount of permitted retail floorspace within the Development and is not reviewing the first principles of the extant OPP. This will support the delivery of retail floorspace within the Development in order to create a sustainable neighbourhood at Mowbray.

4.0 RETAIL IMPACT ASSESSMENT

4.1 In this section, we provide an update to the RIA to demonstrate that the proposed net retail floorspace is acceptable when considered against the relevant retail tests set out in both national and local planning policy.

THE SEQUENTIAL TEST

4.2 Paragraph 91 of the NPPF and Policy 13 of the Horsham Local Plan both require a sequential assessment to be undertaken for planning applications for main town centre uses which are not in an existing centre or in accordance with an up-to-date development plan.

4.3 Policy SD1 of the Local Plan identifies the Mowbray Development Site as a strategic allocation for the delivery of a comprehensive development including a new Local Centre. Policy SD3 goes on to provide further details of the allocation for a new Local Centre, stating that it should provide no more than 6,000 sq. m of sales floorspace together with other appropriate local shopping facilities.

4.4 The Committee Report for the Development confirms that "*given that the provision of retail (i.e. a town centre use) floorspace is allowed for within Policy SD3 of the HDPF, there is no requirement for the proposal to meet the sequential test.*" On this basis, a sequential test is not required for the retail floorspace within the Development and the retail uses are in accordance with local and national policy in this respect. This approach is consistent with the consideration of the OPP.

THE RETAIL IMPACT ASSESSMENT

4.5 Paragraph 94 of the NPPF states that when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. If there is no locally set threshold, the national default threshold is 2,500 sq. m. There is no locally set threshold and therefore the national default applies.

4.6 Policy SD3 of the adopted Horsham District Local Plan required the allocated Local Centre at the Land North of Horsham (the Site) to demonstrate that there would not be a significant adverse impact on Horsham Town Centre. A retail impact assessment was submitted in support of the OPP, which demonstrated full compliance with both national and local retail impact tests. A further RIA was submitted with this Application. An updated impact assessment has been undertaken in response to consultation responses. The full tables are attached at **Appendix 1.0**.

4.7 The RIA Update follows the same methodology as the previous two RIAs, as guided by the NPPF and associated Planning Practice Guidance. The following updates have been made:

- Updated household survey data has been obtained and the market shares have been adjusted accordingly;
- Updated population and expenditure data has been obtained and existing turnovers have been adjusted accordingly;

- The Broadbridge Heath Depot development has been factored into the assessment; and
- A comparison has been made to the 'fallback' position, i.e. the floorspace permitted by the existing S106 Agreement.

4.8 A household survey was undertaken in August 2024 and published by LSH within the Retail Assessment Addendum for Planning Application Ref. DC/23/1133 at Broadbridge Heath Depot. The household survey results provide up-to-date information on current shopping patterns within the District. This was based on a catchment area comprising of eight zones within and surrounding Horsham.

4.9 Since the household survey was undertaken, a new Aldi store has opened on the site of the former Tanbridge Retail Park, and planning permission has been granted for the Broadbridge Heath Depot development, which includes a Lidl store, DIY store and garden centre. It is therefore necessary to adjust the market shares of the existing shopping patterns to take account of these stores.

4.10 The design year for impact testing must be selected to represent the year when the proposal has achieved a 'mature' trading pattern. This is conventionally taken as the second full calendar year of trading after the opening of a new retail development, but it may take longer for some developments to become established. Based on an indicative development timeline, which will require the submission of a reserved matters application for the retail uses, we have taken the Design Year as 2028, which assumes a store opening in 2026. We have also included a Horizon Year of 2030, which assess the impact over the next five years once the retail floorspace has had an opportunity to establish itself.

4.11 The PPG confirms that a judgement as to whether the likely adverse impacts are significant should be reached in light of local circumstances. We conducted an up-to-date health check of Horsham Town Centre in May 2025 and have also considered how much expenditure for both convenience and comparison will be generated as a result of the wider residential development.

4.12 It is important to note that the NPPF is concerned with '*significant adverse impact*' – the focus of Paragraph 95 of the NPPF is not whether there will be an impact, but whether this impact is significant and adverse.

CONSULTATION COMMENTS

4.13 The RIA has been updated having regard to comments raised by, inter alia, Cube RE and Placechanger and adopts the most up-to-date evidence base from August 2024. The RIA Update represents a robust analysis of the impacts arising from the proposed retail floorspace.

HEALTH CHECK OF HORSHAM TOWN CENTRE

4.14 Paragraph 94 of the NPPF requires an assessment to be undertaken of potential impacts upon town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment, as well as the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal. In order to be able to assess the likely impact of a development on a defined centre, it is necessary to undertake an assessment of that centre. The assessment should seek to establish the principal role and function of the relevant centres and their current performance and viability.

4.15 As set out in Paragraph 018 of the NPPG "*a judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances*".

4.16 Establishing the role and function of existing centres within the catchment area from which trade could be diverted is a first step to undertaking an impact assessment and, accordingly, this assessment considers the health of Horsham Town Centre; the principal town centre within Horsham District.

4.17 It should be noted that Cube RE and Placechanger agree that Horsham Town Centre is healthy with strong vitality and viability. In their comments, Placechanger confirm that Horsham Town Centre "*appears both vital and viable with flourishing retail and leisure offers being utilized*". Similarly, Cube RE acknowledge that the retail market within Horsham remains strong and the Town Centre 'thrives'. Cube RE also note the low vacancy rates within the Town Centre and the affluent shopper profile, with high-income consumers that visit frequently and have a high annual spend. As a result, Cube RE highlight that the Town Centre outperforms Horsham's expected catchment area.

4.18 Montagu Evans have undertaken an up-to-date health check assessment of Horsham Town Centre and conducted a site visit to Horsham Town Centre on 2nd May 2025 in order to ensure accurate and up-to-date evidence of its vitality and viability. The health of Horsham Town Centre has been assessed against the series of established indicators set out in the PPG (see **Appendix 4.0**).

4.19 The site visit to Horsham Town Centre observed a balanced representation of national multiples and independent retailers, contributing to a diverse retail offer with convenience and comparison shopping supported by regular markets. The Centre features several major national retailers, anchored by key retailers such as Marks & Spencer and Boots. A strong provision of convenience retailers is also offered at the periphery of the Town Centre, including a large edge-of-centre Sainsburys supermarket, a Waitrose within the John Lewis department store and an edge-of-centre Aldi.

4.20 West Street is the main traditional high street, offering a mix of national and independent retailers in a pedestrian-friendly environment. Swan Walk Shopping Centre, built in the 1970s, connects to East Street and Carfax and includes a range of national retailers. Piries Place in the east of the Town Centre also offers an open-air retail and leisure area that has been recently re-developed, featuring restaurants, a cinema, and smaller retail units.

4.21 The Town Centre includes a number of smaller, independent businesses, including cafés, particularly around the Carfax area. The presence of independent businesses alongside national brands helps maintain Horsham's character. Vacancy trends suggest a relatively stable retail core with ongoing demand for centrally located premises.

4.22 The site visit identified a total of 20 vacant retail units, equating to approximately 4.77% of the total ground floor retail stock within the Town Centre. This represents a low vacancy rate compared to the national average of 19.6%[1] and indicates a healthy retail environment.

4.23 The majority of vacancies were observed on the periphery of the Primary Shopping Area, particularly in less prominent side streets and secondary frontages. Most of the vacant units are smaller units of less than 200 sq. m. Overall, the current level and distribution of vacancies suggest that the core areas of Horsham Town Centre remain commercially resilient. The GOAD Plan for Horsham Town Centre is attached at **Appendix 4.0**.

[1] Experian Retail Planner Briefing Notes, March 2025

4.24 Horsham benefits from strong transport connectivity supported by Horsham Bus Station, which is well integrated within the Town Centre, facilitating ease of access for residents from surrounding areas. Horsham Train Station is located a 12-minute walk from the Town Centre and provides direct rail services to London and other destinations, offering good potential for commuter and visitor access. The Town Centre is also well connected by road, including the A24 and A264, with Piries Place Car Park, providing convenient, centrally located parking.

4.25 Horsham Town Centre benefits from a high-quality environment with well-preserved historical architecture. The presence of period buildings contributes to a strong sense of place and public spaces appeared well-maintained, with clean streets, high-quality landscaping, and a range of street furniture. Pedestrianised areas, such as West Street and East Street, provide a comfortable and attractive setting for visitors and shoppers. The town centre's mix of heritage character and improvements such as the redevelopment of Piries Place, results in a visually cohesive and inviting environment.

4.26 Overall, the vitality and viability of Horsham Town Centre are considered to be strong, resulting in a healthy retail environment. It is within this context that any impacts arising from the Mowbray Development Site must be considered.

RETAIL EXPENDITURE GENERATED BY THE MOWBRAY DEVELOPMENT SITE

4.27 Placechanger assert that there is no need for a 6,000 sq. m retailer within the Mowbray Development site. Notwithstanding the fact that a 6,000 sq. m gross retail unit has already been approved by the OPP, there is no policy requirement to demonstrate need for retail developments.

4.28 The Mowbray Development site is expected to deliver up to 2,750 new residential units ranging from 1-bed apartments to 5-bed detached houses across a variety of tenures, which will generate significant retail expenditure. The Committee Report for the OPP confirms that the Development is expected to house a population of approximately 6,600 residents. As set out in **Table 4.1** below, this is likely to generate up to £22.4m of retail expenditure by 2028, excluding special forms of trading ('SFT'), increasing to £34.4m by 2030 and £52.8m by 2035.

	Total Population of Development	Anticipated Occupation Trajectory			Zone 1 Per Capita Expenditure (£)			Expenditure Generated by Development (£m)		
		2028	2030	2035	2028	2030	2035	2028	2030	2035
Convenience	6,600	46%	69%	100%	3262	3232	3177	9.8	14.7	21.0
Comparison					4173	4343	4820	12.6	19.7	31.8
TOTAL					**7435**	**7576**	**7997**	**22.4**	**34.4**	**52.8**

Table 4.1 – Expenditure Generated by the Mowbray Development Site

4.29 Table 4.2 below sets out the anticipated convenience and comparison expenditure likely to be generated by the Mowbray Development at 2028 and 2030. This assumes that approximately 46% of dwellings will be occupied by 2028, rising to 69% by 2030, based on the current anticipated occupation trajectory.

4.30 This shows that by 2035, the residential element at Mowbray could generate approximately £52.8m of expenditure for convenience and comparison goods. It should be recognised that this is a simplistic view, being the level of turnover that the Masterplan area could support arising from the development of the residential units, assuming no in or out flows. There will also be expenditure associated with the other uses, such as the schools and business park, which are likely to be used by those travelling into the Development. However, it is useful in understanding the level of floorspace which could be supported by the residential in isolation.

4.31 The updated RIA has followed the same methodology as that of the OPP RIA, including the additional population associated with the various new residential developments coming forward in Horsham, namely at North of Horsham (the OPP), West of Horsham, West of Southwater and other small sites. Combined, these sites will significantly increase the residential population of the area.

4.32 The latest population data has been taken from the RIA submitted within the Broadbridge Depot application. This supporting text to Table 1 of Appendix F of the Retail Assessment Addendum submitted in support of that application confirms that:

> *"The base year (2024) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) Location Analyst Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc*."

4.33 It is not clear how much, if any, of the new residential development coming forward in Horsham has been taken account of in the population projections. Nonetheless, to be robust we have also undertaken a sensitivity test, whereby no allowance for additional population associated with the new residential developments have been taken into account ('the population sensitivity test RIA").

4.34 The Site falls within Zone 1 of the Horsham Retail Study Area, which covers the urban extent of Horsham and surrounding areas. We have therefore adopted the per capita expenditure figures for Zone 1 for the purposes of calculating the anticipated expenditure to be generated by the Mowbray Development.

IMPACT ON IN-CENTRE TRADE

4.35 The updated RIA tables at **Appendix 1.0** set out a quantitative analysis of the impact of the net retail floorspace within the Development. We have also undertaken two sensitivity tests: the population sensitivity test at **Appendix 2.0**, which excludes the additional population associated with the new residential development within Horsham, and the sales density sensitivity test at **Appendix 3.0**, which excludes the Aldi and Lidl sales densities from the average sales density used to estimate the turnover of the Proposed Development.

4.36 This RIA Update has utilised data obtained from the Retail Assessment Addendum (August 2024), prepared by LSH submitted in relation to the Broadbridge Heath Depot development (Planning Permission Ref. DC/23/1133). The Broadbridge Heath Depot Retail Assessment Addendum was based on a household survey undertaken in August 2024 and population and expenditure data obtained from Experian in 2024. It therefore provides an up-to-date evidence base for understanding local expenditure and shopping patterns.

4.37 The data has been adjusted to take into account the recent opening of an Aldi store at Tanbridge Retail Park and the granting of planning permission for the Broadbridge Heath Depot development (Lidl).

4.38 To estimate where the retail floorspace within the Development will draw trade from, these existing expenditure patterns for convenience and comparison goods have been analysed to allow an assessment of impact to be undertaken.

4.39 Placechanger criticised the RIA for not taking inflation into account. This assertion is incorrect. Both the previous RIA and the RIA Update have been prepared in line with the latest assumptions regarding expenditure growth and forecasts as set out in the most recent Experian Retail Planner Briefing Note (No. 22, March 2025). This makes an allowance for inflation. This is the standard industry approach. The relevant growth factors have been applied, which take into account the economic trends highlighted by Placechanger, including the impacts of Brexit, the pandemic, the growing proportion of online retail purchases, and business rate and rental costs.

4.40 A summary of the key outcomes from the tables is set out below.

4.41 **Table 1** sets out the predicted change in population across the Study Area (Zone 1-8) at the Base Year (2025), the Design Year (2028) and at five years post submission (2030). This shows that the population will increase from approximately 564,009 to 578,015 (+14,005) in the 5-year period from 2025 to 2030. This includes the additional population associated with the urban extensions identified in Table 1b of the RIA for the OPP.

4.42 **Tables 2A and 2B** set out the per capita expenditure for convenience goods across the eight zones at 2025, 2028 and 2030, including and excluding special forms of trading (SFT). **Tables 3A and 3B** similarly set out per capita expenditure for comparison goods.

4.43 **Tables 4 and 5** set out the total available expenditure (excluding SFT) for convenience and comparison goods, respectively. **Table 4** confirms the amount of expenditure for convenience goods in the Study Area is expected to remain relatively stable between 2025 and 2030 and **Table 5** confirms expenditure for comparison goods is expected to increase by £254.2m over the same period.

4.44 **Table 6** sets out the estimated turnover of the total proposed retail floorspace at the Mowbray Development Site. It assesses a single retail unit of up to 6,000 sq. m and the remaining 400 sq. m for local shopping facilities, on the basis that this will represent a worst-case scenario in terms of impact as the foodstore has a higher sales density, although it is noted that the Village Centre RMA (ref. DC/25/1018) includes up to 753 sq. m of flexible local retail floorspace.

4.45 The sales density for the foodstore floorspace has been based on the average convenience and comparison sales densities of the top seven supermarket retailers. The sales density of the local shopping facilities has been based on the same sales density as utilised in the Retail Statement submitted with the OPP.

4.46 It should be noted that the thresholds within the OPP S106 Agreement allow 100% of the floorspace to be used for convenience goods or 100% to be used for comparison goods, although in reality a foodstore will always include a degree of comparison sales. As convenience floorspace has a higher turnover, the assessed breakdown represents a realistic worst-case scenario.

4.47 A summary of the turnovers within the updated RIA is set out at **Table 4.2** below.

Unit	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)	
			2028	2030
Convenience				
Foodstore	4,200	12,745	53.7	53.8
Local Facilities	0	-	-	-
Total	4,200		53.7	53.8
Comparison				
Foodstore	1,800	6,867	13.2	13.9
Local Facilities	400	5,724	2.4	2.6
Total	2,200		15.7	16.4
Total	**6,400**		**69.3**	**70.2**

Table 4.2: Estimated Turnover of Retail Floorspace within Development

4.48 It is estimated that the turnover of the retail floorspace within the Development will total £69.3m at 2028 rising to £70.2m at 2030.

4.49 **Tables 7 and 8** set out the market shares for existing convenience and comparison shopping locations within Horsham, obtained from the August 2024 Household Survey (Broadbridge Heath Depot Retail Assessment Addendum). This establishes existing shopping patterns within the Study Area.

4.50 **Table 9** sets out the existing turnovers of convenience shopping locations based on local expenditure (Table 4) and the market shares set out within Table 7, with an adjustment made to take into account the opening of an Aldi supermarket on the site of Tanbridge Retail Park in November 2024 and the forthcoming Broadbridge Heath Depot development. It then looks at how these turnovers are expected to grow through to 2028 and 2030. Similarly, **Table 10** sets out the existing turnovers of comparison shopping locations, with an adjustment made to take into account the Broadbridge Heath Depot development.

4.51 **Tables 9 and 10** demonstrate that Horsham Town Centre has an estimated turnover of £343.6m in 2025, with £108.0m from the convenience goods sector, and £235.6m from the comparison goods sector. This turnover is expected to grow to £358.7m in 2028 and £371.6m in 2030 assuming a constant market share approach.

4.52 **Tables 11 and 12** set out the estimated trade draw of the retail floorspace within the Development from each zone within the Study Area. This follows the same trade daw assumptions uses within the original RIA, with the vast majority of trade (70%) expected to come from Zone 1 for both comparison and convenience goods.

4.53 **Table 13** sets out where the convenience component of the retail floorspace is expected to draw trade from at 2028 and 2030. The largest proportion of trade is expected to come from Sainsburys at Worthing Road and Tesco at Broadbridge Heath. Minimal trade is expected to be diverted from other Town Centre shops. The trade diversion follows roughly the same patterns as the original RIA, adjusted to take account of Aldi, Tanbridge Retail Park and Lidl, Broadbridge Heath. Trade diversions are based on professional judgement, considering a range of factors including distance, catchment area, and store size and format.

4.54 **Table 13** demonstrates that the net sales floorspace could have an impact of approximately 13.6% on the convenience goods turnover within Horsham Town Centre at 2028, and that this level of impact is expected to rise to 13.7% at 2030.

4.55 **Table 14** similarly sets out where trade to the comparison goods component of the Development is expected to be diverted from, with around 37% of its trade coming from the Town Centre, 26% coming from out-of-centre

locations within Horsham and 37% coming from other destinations. This results in a minimal 2.3% impact on the comparison goods sector within Horsham Town Centre at 2028, which is also maintained at 2030.

4.56 It should be noted that the NPPF is concerned with the potential impact on centres as a whole, including both comparison and convenience goods, and also having regard to leisure, services and other reasons for visiting. **Table 15** takes the findings of **Tables 13 and 14** to assess the total impact of the retail floorspace within the Development on Horsham Town Centre, considering both the convenience and comparison goods sectors. It demonstrates that the Development is anticipated to have a 5.7% impact on the total retail turnover of the Town Centre at 2028, decreasing to 5.6% at 2030. The impact assessment does not take into account other commercial uses or services, such as the leisure sector. Therefore, the actual impact on the turnover of Horsham Town Centre as a whole is anticipated to be even lower than set out in Table 15.

4.57 **Table 15** also confirms that the total turnover of Horsham Town Centre will continue to grow by 2.1% from 2025 pre-development to 2030 post-development, demonstrating that the turnover of the retail floorspace within the Development will be absorbed by the natural growth in expenditure in the area.

4.58 **Table 15** of the sales density sensitivity test at **Appendix 2.0** assesses the impact of the Proposed Development with a higher sales density, with Aldi and Lidl removed from the average sales density used to estimate the turnover of the Proposed Development. This shows that the impact on the total turnover of the Town Centre would marginally increase by 0.2% to an impact of 5.9% at 2028, decreasing to 5.7% at 2030.

4.59 **Table 15** of the population sensitivity test RIA at **Appendix 3.0** assesses the impact on Horsham Town Centre, assuming that no additional population is attributed to the residential developments coming forward within Horsham, i.e. the sensitivity test. This shows that the impact on both the convenience and comparison goods sectors would increase slightly to 6.1% on the total retail turnover of the Town Centre at 2028, decreasing to 5.9% at 2030. However, even by excluding this additional population from the figures, the total turnover of Horsham Town Centre will continue to grow by 1.6% from 2025 pre-development to 2030 post-development.

4.60 The up-to-date health check of Horsham Town Centre has demonstrated that the Centre is still performing its role within the retail hierarchy well, with strong viability and vitality and a significantly lower vacancy rate than the national average. Given the continued good heath of Horsham Town Centre, it follows that the level of impact expected to arise from the retail floorspace within the Development continues to be acceptable and will not amount to a significant adverse impact, being the key policy test.

RETAIL IMPACT - FALLBACK POSITION

4.61 Schedule 14 of the OPP S106 Agreement allows for up to 6,400 sq. m gross internal area of retail floorspace within the Development, including a retail unit of up to 6,000 sq. m gross internal area. The proposed modification to the S106 should be assessed against this “fall back”, rather than revisiting the assessment of floorspace that has already been approved.

4.62 The updated RIA therefore also assesses the current approved floorspace utilising the up-to-date evidence base to understand the level of impact arising from the Development, as approved.

4.63 **Table 16** sets out the estimated turnover of the approved retail floorspace at the Mowbray Development Site, in line with Schedule 14 of the OPP S106 Agreement. It assesses a single retail unit of up to 6,000 sq. m gross internal area and the remaining 400 sq. m gross internal area for local shopping facilities. Schedule 14 does not restrict net sales area, and therefore the full amount of gross internal area could be used as net sales area in theory. However, almost all retailers will require back of house floorspace that much be taken into account. We

have therefore applied an 85% net to gross ratio for the foodstore floorspace and a 90% net to gross ratio for the local shopping facilities to represent a realistic worst-case scenario.

4.64 The same assumptions have been applied in relation to convenience and comparison breakdown and sales densities. On this basis, it is estimated that the turnover of the approved retail floorspace will total £59.1m at 2028 rising to £59.8m at 2030. This compares with £69.3m and £70.2m at 2028 and 2030, respectively, for the proposed floorspace.

4.65 The same trade draw assumptions have been applied to the fallback as the proposed floorspace. **Table 17** demonstrates that the fallback could have an impact of approximately 11.6% on the convenience goods turnover within Horsham Town Centre at 2028, which will be maintained at 2030. Therefore, the proposal will have only a 2.1% greater impact when compared to the fallback position at 2028.

4.66 **Table 18** sets out that the approved retail floorspace will result in a 2.0% impact on the comparison goods sector within Horsham Town Centre at 2028, which is also maintained at 2030. The proposed retail floorspace will therefore only have a 0.3% greater impact.

4.67 Taking into account the impact on Horsham Town Centre as a whole, including both comparison and convenience goods, the fallback will have a 4.9% impact at 2028, falling to 4.8% at 2030. Table 4.3 below sets out the comparison of the impacts of the fall back and proposed floorspace.

	Impact of Approved Retail Floorspace	Impact of Proposed Retail Floorspace	Difference
Convenience Impact	11.6%	13.7%	2.1%
Comparison Impact	2.0%	2.3%	0.3%
Total Impact	4.8%	5.6%	0.8%

Table 4.3: Comparison of Impacts on Horsham Town Centre at 2030

4.68 Table 4.3 above demonstrates that the uplift in floorspace proposed by the requested S106 modification will have only a 0.8% impact on Horsham Town Centre as a whole when compared to the impact of the retail floorspace that can already be delivered on the Site.

4.69 Table 4.4 below sets out the comparison of the impacts of the fall back and proposed floorspace, based on the sensitivity test RIA. This demonstrates that the uplift in floorspace proposed by the request to modify the S106 will have only a 0.9% impact on Horsham Town Centre as a whole when compared to the impact of the retail floorspace that can already be delivered on the Site

	Impact of Approved Retail Floorspace	Impact of Proposed Retail Floorspace	Difference
Convenience Impact	12.4%	14.6%	2.2%
Comparison Impact	2.1%	2.4%	0.3%
Total Impact	5.0%	5.9%	0.9%

Table 4.4: Comparison of Impacts on Horsham Town Centre at 2030 – Sensitivity Test

4.70 In the Committee Report for the OPP, officers concluded that "*the total provisions proposed would not lead to a significantly detrimental impact on the town centre. It is therefore considered that the proposed retail aspects of the local centre are appropriate and acceptable*." Given that the proposed retail floorspace represents only a minimal increase in retail impact and that the Town Centre remains healthy, this level of impact should be

considered acceptable. It cannot be the case that a 0.8% uplift in impact on a healthy town centre as a whole would amount to a significant adverse impact.

IMPACT ON EXISTING, COMMITTED AND PLANNED PUBLIC AND PRIVATE INVESTMENT

4.71 It is also relevant to consider the impact that proposals will have on any existing, committed, or planned public and private investments within defined centres. Again, we consider that this assessment should only relate to the net uplift/take account of the fall back

4.72 With regard to the Development's impact on existing investment, i.e., investment already made, this has been addressed through the updated quantitative impact assessment. This demonstrates that the level of trade diversion from any defined centre is minimal and not at a level that could be considered to be significant adverse.

4.73 In respect of committed and planned public and private investment, the Horsham Local Plan identifies an Opportunity Area known Broadbridge Heath Quadrant where redevelopment is supported to reinforce its role as a successful out-of-centre retail destination. Policy 6 of the Local Plan states that development on the Broadbridge Heath Quadrant site, which comprises existing large-format retail units and a Tesco supermarket, will provide an appropriate mix of uses, which could include additional retail use as well as leisure, residential, hotel and food and beverage uses. These uses are intended to better provide for local needs and complement the new communities being formed in the west of Horsham through strategic development. Policy 6 states that expansion of the existing foodstore may be acceptable, provided that convenience retail remains the predominant use.

4.74 Planning Permission Ref. DC/23/1133 was granted in March 2025 for retail and leisure uses at Broadbridge Heath, including a discount foodstore, a DIY store with garden centre, a drive-thru coffee shop and a drive-thru restaurant. The two retail units comprise a total net sales area of 3,070 sq. m, including 1,001 sq. m of convenience floorspace and 2,069 sq. m of comparison floorspace. The Planning Statement prepared by LSH confirms that the development has been designed to support the strategic development sites at Wickhurst Green and Highwood Village.

4.75 The primary role of the additional retail floorspace is to support the new residential development coming forward in the West Horsham area, while the primary role of the retail floorspace at the Mowbray Development site is to support the current and future residents of the North Horsham area. Further, given that the retail floorspace associated with the OPP was approved before the submission of the Broadbridge Heath application, the decision to proceed with the scheme would have been taken in light of the retail at Mowbray also coming forward, which itself is an allocation within the Local Plan.

4.76 It is clear that the retail floorspace at Mowbray Development Site, which was approved over seven years ago, will not undermine the delivery of planned retail development at Broadbridge Heath Quadrant. Not only is there sufficient expenditure capacity in the area to support both developments, but the two developments have been designed to primarily meet the needs of different strategic allocations.

4.77 In summary, it can be concluded that the retail uses at Mowbray Development Site will not undermine the ability or likelihood of planned investment into Broadbridge Heath Retail Park coming forward.

4.78 We are not aware of any other notable planned retail investment in Horsham Town Centre.

4.79 It follows that the proposed variation to Schedule 14 will not lead to an adverse impact on any existing or future investment.

CONCLUSION

4.80 The Mowbray Development Site is allocated under Policy SD1 and Policy SD3 of the Local Plan for the scale and type of retail uses proposed by this S106 variation. A sequential assessment is therefore not required for the retail uses because the Development accords with Paragraph 91 of the NPPF. This approach is consistent with the consideration of the OPP.

4.81 The updated RIA confirms that when adopting the figures in the S106 Agreement as net retail sales areas, the retail uses within the Development will continue not to have a 'significant adverse impact' on the vitality and viability of Horsham Town Centre, or on any committed or planned investments.

4.82 The proposed retail floorspace fully accords with Policy SD3 of the HDPF, which allocates the Site for 6,000 sq. m sales floorspace in addition to local shopping facilities.

4.83 When compared to the approved retail floorspace, i.e. the fallback position, the proposed retail floorspace will result in an increase of only 0.8% impact on the total turnover of Horsham Town Centre. This uplift is minimal and will ensure that Horsham Town Centre remains a healthy town centre with strong viability and vitality, as observed in the up-to-date health check assessment and by Placechanger and Cube RE. In this context, the estimated impact of 5.6% arising from the total proposed floorspace is not considered to be significant adverse and remains negligible compared to the OPP.

4.84 We therefore conclude that the Development continues to satisfy the requirements of the impact test, and it follows that the Development accords with Paragraph 94 of the NPPF.

5.0 CONCLUSION

5.1 This Retail Impact Assessment Update has been prepared in response to consultation responses received in relation to Deed of Modification Application Ref. S106/25/0013, which seeks to amend Schedule 14 of the S106 Agreement for the Mowbray Development Site.

5.2 The retail floorspace restrictions within Schedule 14 of the S106 Agreement do not align with the amount of retail floorspace that was assessed and found to be acceptable within the OPP Retail Statement. This Application seeks to vary Schedule 14 to allow an uplift in retail floorspace within the Development.

5.3 This RIA Update provides a robust and up-to-date assessment that demonstrates that varying the current restriction to allow 6,400 sq. m of net retail sales floorspace within the Development, including a retail unit of up to 6,000 sq. m net sales area, would not result in any significant adverse retail impacts in accordance with Paragraph 94 of the NPPF and the impact test.

5.4 Importantly, the Development will continue to align with the site allocation set out within Policy SD3 of the HDPF, which allows for a single store with up to 6,000 sq. m of sales floorspace, in addition to local shopping facilities. This allocation has been in place for 10 years and underwent thorough consultation and examination in public during the plan-making process. The OPP was approved 7 years ago, establishing planning permission for a 6,400 sq. m of gross retail floorspace and remains live for implementation

5.5 The proposed uplift in retail floorspace is marginal, particularly when compared to the amount assessed in the OPP RIA, and the impacts associated with the uplift are minimal. The RIA Update has demonstrated that when comparing the proposed variation to the fallback position, the impacts remain low with just a 0.8% increase in impact on Horsham Town Centre. The estimated impact does not amount to a significant adverse impact given the current health of the centre, which all parties agree remains of strong vitality and viability. This remains the case with the sensitivity test.

5.6 To provide further comfort to the Council, the Applicant will agree to a restriction of 7,500 sq. m gross internal floorspace for a single retail unit alongside the proposed net sales areas to ensure that a significantly larger store with extensive back of house floorspace is not delivered on the Site.

5.7 Given the above, and in the context of a very healthy Town Centre, we conclude that the retail floorspace within the Development fully accords with both national and local retail planning policy and, in particular, the level of impact is considered to be acceptable in accordance with Paragraph 94 of the NPPF.

APPENDIX 1.0
RETAIL IMPACT ASSESSMENT TABLES

Retail Impact Assessment
Mowbray, Horsham

Table 1: Population

Zone	Population		
	2025	2028	2030
1	107,487	110,158	111,940
New Residential Population in Zone 1	7,192	8,102	8,663
2	65,746	65,901	66,005
3	115,485	116,275	116,801
4	114,923	116,490	117,534
5	97,504	98,628	99,376
6	27,529	28,116	28,508
7	22,005	22,481	22,799
8	6,139	6,289	6,389
Total	**564,009**	**572,440**	**578,015**

Notes:

1. Population taken from Appendix F Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (Augus
2. Population associated with new residential population at 2021 and 2026 taken from Table 1b, Appendix E of F
3. Application Site falls within Zone 1

Table 2A: Per Capita Expenditure Including SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,501	3,459	3,439
2	3,755	3,711	3,688
3	2,963	2,927	2,910
4	3,530	3,488	3,467
5	3,338	3,298	3,278
6	3,856	3,810	3,787
7	3,513	3,471	3,450
8	3,966	3,918	3,895

Notes:

1. 2024 per capita expenditure taken Appendix F Table 2 of Broadbridge Heath Depot Retail Assessment Adden
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 2B: Per Capita Expenditure Excluding SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,319	3,262	3,232
2	3,560	3,499	3,467
3	2,809	2,761	2,735
4	3,347	3,289	3,259
5	3,164	3,110	3,081
6	3,656	3,593	3,560
7	3,330	3,273	3,243
8	3,759	3,695	3,661

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Table 3A: Per Capita Expenditure Including SFT - Comparison

Zone	2025	2028	2030
1	5,242	5,579	5,861
2	5,535	5,891	6,189
3	4,029	4,288	4,505
4	5,267	5,606	5,889
5	4,706	5,008	5,262
6	5,691	6,057	6,364
7	5,250	5,587	5,870
8	5,777	6,148	6,460

Notes:

1. 2024 per capita expenditure taken Appendix F Table 4 of Broadbridge Heath Depot Retail Assessment Addend
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 3B: Per Capita Expenditure Excluding SFT - Comparison

Zone	2025	2028	2030
1	3,979	4,173	4,343
2	4,201	4,406	4,586
3	3,058	3,208	3,339
4	3,998	4,193	4,364
5	3,572	3,746	3,899
6	4,320	4,531	4,716
7	3,985	4,179	4,350
8	4,385	4,599	4,787

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Table 4: Total Available Convenience Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	380.6	385.8	389.8
2	234.1	230.6	228.8
3	324.4	321.0	319.5
4	384.6	383.2	383.1
5	308.5	306.7	306.2
6	100.6	101.0	101.5
7	73.3	73.6	73.9
8	23.1	23.2	23.4
Total	**1,829.2**	**1,825.1**	**1,826.3**

Notes:

1. Excluding SFT
2. 2024 Prices

Table 5: Total Available Comparison Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	456.3	493.5	523.8
2	276.2	290.4	302.7
3	353.2	373.0	389.9
4	459.4	488.4	512.9
5	348.3	369.5	387.5
6	118.9	127.4	134.4
7	87.7	94.0	99.2
8	26.9	28.9	30.6
Total	**2,126.9**	**2,265.1**	**2,381.1**

Notes:

1. Excluding SFT
2. 2024 Prices

Table 6: Turnover of Proposed Development

Unit	Total Sales Floorspace (sq. m)	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
					2025	2028	2030
Convenience							
Foodstore	6,000	70%	4,200	12,745	53.5	53.7	53.8
Local Facilities	400	0%	0	-	-	-	-
Total	6,400		4,200		53.5	53.7	53.8
Comparison							
Foodstore	6,000	30%	1,800	6,867	12.4	13.2	13.9
Local Facilities	400	100%	400	5,724	2.3	2.4	2.6
Total	6,400		2,200		14.6	15.7	16.4
Total Turnover					**68.2**	**69.3**	**70.2**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys, M&S Food, Aldi and Lidl obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (December 2024)
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Table 7: Convenience Market Shares

	Market Share (%)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	17.1%	1.0%	1.0%	0.0%	0.0%	1.0%	0.0%	4.0%
Waitrose, Albion Way, Horsham, RH12 1AJ	5.7%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	6.0%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Town Centre Shops	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Town Centre	28.0%	1.0%	1.0%	0.0%	0.0%	2.0%	0.0%	9.9%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	21.0%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	10.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Other Out of Centre	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Out of Centre	32.6%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	11.9%
Horsham Local Shops								
TOTAL Local Shops	7.0%	0.0%	0.3%	0.0%	0.5%	0.0%	0.4%	0.0%
Other Destinations								
TOTAL Other Destinations	32.3%	92.0%	97.7%	100.0%	99.5%	98.0%	99.6%	78.1%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix D Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Table 8: Comparison Market Shares

	Market Share (%)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Horsham In Centre								
Horsham Town Centre	36.1%	6.4%	2.0%	1.3%	2.3%	8.8%	0.7%	13.4%
Tanbridge Retail Park	2.9%	0.7%	0.0%	0.2%	0.1%	1.0%	0.0%	2.3%
TOTAL Horsham Town Centre	39.0%	7.1%	2.0%	1.5%	2.4%	9.8%	0.7%	15.7%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	2.5%	1.5%	0.2%	0.0%	0.0%	0.5%	0.0%	1.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	2.2%	0.7%	0.0%	0.0%	0.0%	1.8%	0.0%	2.7%
Other Out of Centre	3.7%	1.6%	0.3%	0.1%	0.4%	6.7%	0.3%	4.0%
TOTAL Horsham Out of Centre	9.3%	3.8%	0.5%	0.1%	0.4%	9.0%	0.3%	8.6%
Other Destinations								
TOTAL Other Destinations	51.7%	89.1%	97.5%	98.4%	97.2%	81.2%	99.0%	75.7%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix E Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Table 9: Existing Convenience Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Aldi, Tanbridge Retail Park (£m)	Trade Diversion to Lidl, Broadbridge Heath (£m)	Turnover at 2025 inc. Aldi & Lidl (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
						2028	2030
Horsham Town Centre							
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	72.47	-6.00	-0.90	65.57	0.04	65.42	65.46
Waitrose, Albion Way, Horsham, RH12 1AJ	24.04	-0.50	-0.30	23.24	0.01	23.19	23.20
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.84	-0.50	-0.15	6.19	0.00	6.17	6.18
Other Town Centre Shops	13.30	-0.10	-0.15	13.05	0.01	13.02	13.02
TOTAL Horsham Town Centre	116.65	-7.10	-1.51	108.04	0.06	107.79	107.86
Horsham Out of Centre							
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	101.90	-5.00	-2.41	94.48	0.05	94.27	94.33
Lidl, Foundry Lane, Horsham, RH13 5PX	41.64	-1.00	-1.51	39.13	0.02	39.04	39.07
Other Out of Centre	3.04			3.04	0.00	3.03	3.03
Aldi, Tanbridge Retail Park	0.00	16.30		16.30	0.01	16.27	16.28
Lidl, Broadbridge Heath Retail park	0.00		6.03	6.03	0.00	6.02	6.02
TOTAL Horsham Out of Centre	146.57	10.30	2.11	158.99	0.09	158.63	158.73
Horsham Local Shops							
TOTAL Local Shops	29.41			29.41	0.02	29.34	29.36
Other Destinations							
TOTAL Other Destinations	1,536.60	-3.20	-0.60	1,532.80	0.84	1,529.34	1,530.32
TOTAL	**1,829.22**	**0.00**	**0.00**	**1,829.23**	**1.00**	**1,825.10**	**1,826.27**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Aldi, Tanbridge Retail Park and Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. Aldi turnover based on net sales floorspace from Application Ref. DC/21/1413 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
5. Lidl turnover based on net sales floorspace from Application Ref. DC/23/1133 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
6. 2024 Prices

Table 10: Existing Comparison Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Broadbridge Heath Development (£m)	2025 Turnover inc. Broadbridge Heath Development (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
					2028	2030
Horsham In Centre						
Horsham Town Centre	217.94	-0.58	217.35	0.10	231.48	243.33
Tanbridge Retail Park	18.23	0.00	18.23	0.01	19.41	20.40
TOTAL Horsham Town Centre	236.16	-0.58	235.58	0.11	250.89	263.73
Horsham Out of Centre						
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	17.35	-0.25	17.10	0.01	18.22	19.15
Lidl, Foundry Lane, Horsham, RH13 5PX	4.10	-0.14	3.96	0.00	4.22	4.44
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	14.83	2.05	16.88	0.01	17.98	18.90
Other Out of Centre	33.49	-0.42	33.08	0.02	35.23	37.03
TOTAL Horsham Out of Centre	69.77	1.25	71.02	0.03	75.64	79.51
Other Destinations						
TOTAL Other Destinations	1,820.92	-0.66	1,820.26	0.86	1,938.54	2,037.80
TOTAL	**2,126.86**	**0.00**	**2,126.86**	**1.00**	**2,265.06**	**2,381.05**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. 2024 Prices

Table 11: Convenience Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	37.6	37.7
Zone 2	10%	5.4	5.4
Zone 3	5%	2.7	2.7
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	2.7	2.7
Zone 7	0%	0.0	0.0
Zone 8	5%	2.7	2.7
Outside Catchment	5%	2.7	2.7
Total	**100.0%**	**53.7**	**53.8**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Table 12: Comparison Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	11.0	11.5
Zone 2	10%	1.6	1.6
Zone 3	5%	0.8	0.8
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	0.8	0.8
Zone 7	0%	0.0	0.0
Zone 8	5%	0.8	0.8
Outside Catchment	5%	0.8	0.8
Total	**100.0%**	**15.7**	**16.4**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Table 13: Impact of Proposed Development - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	65.4	65.5	12.8	12.8	52.6	52.7	-19.5%	-19.6%
Waitrose, Albion Way, Horsham, RH12 1AJ	23.2	23.2	1.8	1.8	21.4	21.4	-7.6%	-7.7%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.2	6.2	0.2	0.2	6.0	6.0	-2.6%	-2.6%
Other Town Centre Shops	13.0	13.0	0.2	0.2	12.8	12.8	-1.7%	-1.7%
TOTAL Horsham Town Centre	107.8	107.9	14.7	14.7	93.1	93.1	-13.6%	-13.7%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	94.3	94.3	17.4	17.5	76.8	76.8	-18.5%	-18.5%
Lidl, Foundry Lane, Horsham, RH13 5PX	39.0	39.1	0.0	0.0	39.0	39.1	0.0%	0.0%
Other Out of Centre	3.0	3.0	0.0	0.0	3.0	3.0	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.3	16.3	3.8	3.8	12.5	12.5	-23.1%	-23.1%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.6	1.6	4.4	4.4	-26.8%	-26.8%
TOTAL Horsham Out of Centre	158.6	158.7	24.4	24.5	134.2	134.3	-15.4%	-15.4%
Horsham Local Shops								
TOTAL Local Shops	29.3	29.4	0.0	0.0	29.3	29.4	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,529.3	1,530.3	14.3	14.4	1,515.0	1,516.0	-0.9%	-0.9%
TOTAL	**1,825.1**	**1,826.3**	**53.5**	**53.6**	**1,771.6**	**1,772.7**		

Notes:

1. 2024 Prices

Table 14: Impact of Proposed Development - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	231.5	243.3	5.9	6.0	225.6	237.3	-2.5%	-2.5%
Tanbridge Retail Park	19.4	20.4	0.0	0.0	19.4	20.4	0.0%	0.0%
TOTAL Horsham Town Centre	250.9	263.7	5.9	6.0	245.0	257.7	-2.3%	-2.3%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	18.2	19.1	0.0	0.0	18.2	19.1	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	4.2	4.4	0.0	0.0	4.2	4.4	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	18.0	18.9	4.1	4.2	13.9	14.7	-22.6%	-22.0%
Other Out of Centre	35.2	37.0	0.0	0.0	35.2	37.0	0.0%	0.0%
TOTAL Horsham Out of Centre	75.6	79.5	4.1	4.2	71.6	75.4	-5.4%	-5.2%
Other Destinations								
TOTAL Other Destinations	1938.5	2037.8	5.7	5.9	1932.8	2031.9	-0.3%	-0.3%
TOTAL	**2265.1**	**2381.1**	**15.7**	**16.0**	**2249.4**	**2365.0**		

Notes:

1. 2024 Prices

Table 15: Total Impact of Proposed Development on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	358.7	371.6	20.6	20.7	338.1	350.9	-5.7%	-5.6%	7.24	2.1%

Notes:

1. 2024 Prices

Table 16: Turnover of Approved Fallback Scheme

Unit	Gross Internal Area (sq. m)	Gross to Net Ratio	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
						2025	2028	2030
Convenience								
Foodstore	6,000	85%	70%	3,570	12,745	45.5	45.6	45.7
Local Facilities	400	90%	0%	0	-	-	-	-
Total	6,400			3,570		45.5	45.6	45.7
Comparison								
Foodstore	6,000	85%	30%	1,530	6,867	10.5	11.2	11.8
Local Facilities	400	90%	100%	360	5,724	2.1	2.2	2.3
Total	6,400			1,890		12.6	13.4	14.1
Total Turnover						**58.1**	**59.1**	**59.8**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys, M&S Food, Aldi and Lidl obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (December 2024)
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Table 17: Impact of Approved Fallback Scheme - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	65.4	65.5	10.9	10.9	54.6	54.6	-16.6%	-16.6%
Waitrose, Albion Way, Horsham, RH12 1AJ	23.2	23.2	1.5	1.5	21.7	21.7	-6.5%	-6.5%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.2	6.2	0.1	0.1	6.0	6.0	-2.2%	-2.2%
Other Town Centre Shops	13.0	13.0	0.2	0.2	12.8	12.8	-1.4%	-1.4%
TOTAL Horsham Town Centre	107.8	107.9	12.5	12.5	95.3	95.3	-11.6%	-11.6%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	94.3	94.3	14.8	14.9	79.4	79.5	-15.7%	-15.8%
Lidl, Foundry Lane, Horsham, RH13 5PX	39.0	39.1	0.0	0.0	39.0	39.1	0.0%	0.0%
Other Out of Centre	3.0	3.0	0.0	0.0	3.0	3.0	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.3	16.3	3.2	3.2	13.1	13.1	-19.6%	-19.7%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.4	1.4	4.6	4.6	-22.8%	-22.8%
TOTAL Horsham Out of Centre	158.6	158.7	20.8	20.8	137.9	137.9	-13.1%	-13.1%
Horsham Local Shops								
TOTAL Local Shops	29.3	29.4	0.0	0.0	29.3	29.4	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,529.3	1,530.3	12.2	12.2	1,517.2	1,518.1	-0.8%	-0.8%
TOTAL	**1,825.1**	**1,826.3**	**45.5**	**45.5**	**1,779.6**	**1,780.7**		

Notes:

1. 2024 Prices

Table 18: Impact of Approved Fallback Scheme - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	231.5	243.3	5.0	5.1	226.5	238.2	-2.2%	-2.1%
Tanbridge Retail Park	19.4	20.4	0.0	0.0	19.4	20.4	0.0%	0.0%
TOTAL Horsham Town Centre	250.9	263.7	5.0	5.1	245.9	258.6	-2.0%	-2.0%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	18.2	19.1	0.0	0.0	18.2	19.1	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	4.2	4.4	0.0	0.0	4.2	4.4	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	18.0	18.9	3.5	3.6	14.5	15.3	-19.3%	-18.9%
Other Out of Centre	35.2	37.0	0.0	0.0	35.2	37.0	0.0%	0.0%
TOTAL Horsham Out of Centre	75.6	79.5	3.5	3.6	72.2	75.9	-4.6%	-4.5%
Other Destinations								
TOTAL Other Destinations	1,938.5	2037.8	4.9	5.1	1,933.6	2,032.8	-0.3%	-0.2%
TOTAL	**2,265.1**	**2381.1**	**13.4**	**13.8**	**2,251.6**	**2,367.3**		

Notes:

1. 2024 Prices

Table 19: Total Impact of Approved Fallback Scheme on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Draw to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	358.7	371.6	17.5	17.7	341.2	353.9	-4.9%	-4.8%	10.30	3.0%

Notes:

1. 2024 Prices

APPENDIX 2.0

RETAIL IMPACT ASSESSMENT TABLES - SALES DENSITY SENSITIVITY TEST

Retail Impact Assessment
Mowbray, Horsham

Table 1: Population

Zone	Population		
	2025	2028	2030
1	107,487	110,158	111,940
New Residential Population in Zone 1	7,192	8,102	8,663
2	65,746	65,901	66,005
3	115,485	116,275	116,801
4	114,923	116,490	117,534
5	97,504	98,628	99,376
6	27,529	28,116	28,508
7	22,005	22,481	22,799
8	6,139	6,289	6,389
Total	**564,009**	**572,440**	**578,015**

Notes:

1. Population taken from Appendix F Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (Augus
2. Population associated with new residential population at 2021 and 2026 taken from Table 1b, Appendix E of F
3. Application Site falls within Zone 1

Table 2A: Per Capita Expenditure Including SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,501	3,459	3,439
2	3,755	3,711	3,688
3	2,963	2,927	2,910
4	3,530	3,488	3,467
5	3,338	3,298	3,278
6	3,856	3,810	3,787
7	3,513	3,471	3,450
8	3,966	3,918	3,895

Notes:

1. 2024 per capita expenditure taken Appendix F Table 2 of Broadbridge Heath Depot Retail Assessment Adden
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 2B: Per Capita Expenditure Excluding SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,319	3,262	3,232
2	3,560	3,499	3,467
3	2,809	2,761	2,735
4	3,347	3,289	3,259
5	3,164	3,110	3,081
6	3,656	3,593	3,560
7	3,330	3,273	3,243
8	3,759	3,695	3,661

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Table 3A: Per Capita Expenditure Including SFT - Comparison

Zone	2025	2028	2030
1	5,242	5,579	5,861
2	5,535	5,891	6,189
3	4,029	4,288	4,505
4	5,267	5,606	5,889
5	4,706	5,008	5,262
6	5,691	6,057	6,364
7	5,250	5,587	5,870
8	5,777	6,148	6,460

Notes:

1. 2024 per capita expenditure taken Appendix F Table 4 of Broadbridge Heath Depot Retail Assessment Addend
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 3B: Per Capita Expenditure Excluding SFT - Comparison

Zone	2025	2028	2030
1	3,979	4,173	4,343
2	4,201	4,406	4,586
3	3,058	3,208	3,339
4	3,998	4,193	4,364
5	3,572	3,746	3,899
6	4,320	4,531	4,716
7	3,985	4,179	4,350
8	4,385	4,599	4,787

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Table 4: Total Available Convenience Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	380.6	385.8	389.8
2	234.1	230.6	228.8
3	324.4	321.0	319.5
4	384.6	383.2	383.1
5	308.5	306.7	306.2
6	100.6	101.0	101.5
7	73.3	73.6	73.9
8	23.1	23.2	23.4
Total	**1,829.2**	**1,825.1**	**1,826.3**

Notes:

1. Excluding SFT
2. 2024 Prices

Table 5: Total Available Comparison Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	456.3	493.5	523.8
2	276.2	290.4	302.7
3	353.2	373.0	389.9
4	459.4	488.4	512.9
5	348.3	369.5	387.5
6	118.9	127.4	134.4
7	87.7	94.0	99.2
8	26.9	28.9	30.6
Total	**2,126.9**	**2,265.1**	**2,381.1**

Notes:

1. Excluding SFT
2. 2024 Prices

Table 6: Turnover of Proposed Development

Unit	Total Sales Floorspace (sq. m)	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
					2025	2028	2030
Convenience							
Foodstore	6,000	70%	4,200	13,145	55.2	55.4	55.5
Local Facilities	400	0%	0	-	-	-	-
Total	6,400		4,200		55.2	55.4	55.5
Comparison							
Foodstore	6,000	30%	1,800	6,852	12.3	13.2	13.8
Local Facilities	400	100%	400	5,724	2.3	2.4	2.6
Total	6,400		2,200		14.6	15.6	16.4
Total Turnover					**69.8**	**71.0**	**71.9**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys and M&S Food obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (Dece
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Table 7: Convenience Market Shares

	Market Share (%)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	17.1%	1.0%	1.0%	0.0%	0.0%	1.0%	0.0%	4.0%
Waitrose, Albion Way, Horsham, RH12 1AJ	5.7%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	6.0%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Town Centre Shops	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Town Centre	28.0%	1.0%	1.0%	0.0%	0.0%	2.0%	0.0%	9.9%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	21.0%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	10.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Other Out of Centre	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Out of Centre	32.6%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	11.9%
Horsham Local Shops								
TOTAL Local Shops	7.0%	0.0%	0.3%	0.0%	0.5%	0.0%	0.4%	0.0%
Other Destinations								
TOTAL Other Destinations	32.3%	92.0%	97.7%	100.0%	99.5%	98.0%	99.6%	78.1%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix D Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Table 8: Comparison Market Shares

	Market Share (%)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Horsham In Centre								
Horsham Town Centre	36.1%	6.4%	2.0%	1.3%	2.3%	8.8%	0.7%	13.4%
Tanbridge Retail Park	2.9%	0.7%	0.0%	0.2%	0.1%	1.0%	0.0%	2.3%
TOTAL Horsham Town Centre	39.0%	7.1%	2.0%	1.5%	2.4%	9.8%	0.7%	15.7%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	2.5%	1.5%	0.2%	0.0%	0.0%	0.5%	0.0%	1.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	2.2%	0.7%	0.0%	0.0%	0.0%	1.8%	0.0%	2.7%
Other Out of Centre	3.7%	1.6%	0.3%	0.1%	0.4%	6.7%	0.3%	4.0%
TOTAL Horsham Out of Centre	9.3%	3.8%	0.5%	0.1%	0.4%	9.0%	0.3%	8.6%
Other Destinations								
TOTAL Other Destinations	51.7%	89.1%	97.5%	98.4%	97.2%	81.2%	99.0%	75.7%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix E Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Table 9: Existing Convenience Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Aldi, Tanbridge Retail Park (£m)	Trade Diversion to Lidl, Broadbridge Heath (£m)	Turnover at 2025 inc. Aldi & Lidl (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
						2028	2030
Horsham Town Centre							
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	72.47	-6.00	-0.90	65.57	0.04	65.42	65.46
Waitrose, Albion Way, Horsham, RH12 1AJ	24.04	-0.50	-0.30	23.24	0.01	23.19	23.20
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.84	-0.50	-0.15	6.19	0.00	6.17	6.18
Other Town Centre Shops	13.30	-0.10	-0.15	13.05	0.01	13.02	13.02
TOTAL Horsham Town Centre	116.65	-7.10	-1.51	108.04	0.06	107.79	107.86
Horsham Out of Centre							
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	101.90	-5.00	-2.41	94.48	0.05	94.27	94.33
Lidl, Foundry Lane, Horsham, RH13 5PX	41.64	-1.00	-1.51	39.13	0.02	39.04	39.07
Other Out of Centre	3.04			3.04	0.00	3.03	3.03
Aldi, Tanbridge Retail Park	0.00	16.30		16.30	0.01	16.27	16.28
Lidl, Broadbridge Heath Retail park	0.00		6.03	6.03	0.00	6.02	6.02
TOTAL Horsham Out of Centre	146.57	10.30	2.11	158.99	0.09	158.63	158.73
Horsham Local Shops							
TOTAL Local Shops	29.41			29.41	0.02	29.34	29.36
Other Destinations							
TOTAL Other Destinations	1,536.60	-3.20	-0.60	1,532.80	0.84	1,529.34	1,530.32
TOTAL	**1,829.22**	**0.00**	**0.00**	**1,829.23**	**1.00**	**1,825.10**	**1,826.27**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Aldi, Tanbridge Retail Park and Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. Aldi turnover based on net sales floorspace from Application Ref. DC/21/1413 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
5. Lidl turnover based on net sales floorspace from Application Ref. DC/23/1133 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
6. 2024 Prices

Table 10: Existing Comparison Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Broadbridge Heath Development (£m)	2025 Turnover inc. Broadbridge Heath Development (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
					2028	2030
Horsham In Centre						
Horsham Town Centre	217.94	-0.58	217.35	0.10	231.48	243.33
Tanbridge Retail Park	18.23	0.00	18.23	0.01	19.41	20.40
TOTAL Horsham Town Centre	236.16	-0.58	235.58	0.11	250.89	263.73
Horsham Out of Centre						
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	17.35	-0.25	17.10	0.01	18.22	19.15
Lidl, Foundry Lane, Horsham, RH13 5PX	4.10	-0.14	3.96	0.00	4.22	4.44
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	14.83	2.05	16.88	0.01	17.98	18.90
Other Out of Centre	33.49	-0.42	33.08	0.02	35.23	37.03
TOTAL Horsham Out of Centre	69.77	1.25	71.02	0.03	75.64	79.51
Other Destinations						
TOTAL Other Destinations	1,820.92	-0.66	1,820.26	0.86	1,938.54	2,037.80
TOTAL	**2,126.86**	**0.00**	**2,126.86**	**1.00**	**2,265.06**	**2,381.05**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. 2024 Prices

Table 11: Convenience Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	38.8	38.8
Zone 2	10%	5.5	5.5
Zone 3	5%	2.8	2.8
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	2.8	2.8
Zone 7	0%	0.0	0.0
Zone 8	5%	2.8	2.8
Outside Catchment	5%	2.8	2.8
Total	**100.0%**	**55.4**	**55.5**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Table 12: Comparison Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	10.9	11.5
Zone 2	10%	1.6	1.6
Zone 3	5%	0.8	0.8
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	0.8	0.8
Zone 7	0%	0.0	0.0
Zone 8	5%	0.8	0.8
Outside Catchment	5%	0.8	0.8
Total	**100.0%**	**15.6**	**16.4**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Table 13: Impact of Proposed Development - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	65.4	65.5	13.2	13.2	52.2	52.3	-20.1%	-20.2%
Waitrose, Albion Way, Horsham, RH12 1AJ	23.2	23.2	1.8	1.8	21.4	21.4	-7.9%	-7.9%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.2	6.2	0.2	0.2	6.0	6.0	-2.7%	-2.7%
Other Town Centre Shops	13.0	13.0	0.2	0.2	12.8	12.8	-1.7%	-1.7%
TOTAL Horsham Town Centre	107.8	107.9	15.2	15.2	92.6	92.7	-14.1%	-14.1%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	94.3	94.3	18.0	18.0	76.3	76.3	-19.1%	-19.1%
Lidl, Foundry Lane, Horsham, RH13 5PX	39.0	39.1	0.0	0.0	39.0	39.1	0.0%	0.0%
Other Out of Centre	3.0	3.0	0.0	0.0	3.0	3.0	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.3	16.3	3.9	3.9	12.4	12.4	-23.8%	-23.9%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.7	1.7	4.4	4.4	-27.6%	-27.6%
TOTAL Horsham Out of Centre	158.6	158.7	25.2	25.2	133.4	133.5	-15.9%	-15.9%
Horsham Local Shops								
TOTAL Local Shops	29.3	29.4	0.0	0.0	29.3	29.4	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,529.3	1,530.3	14.8	14.8	1,514.6	1,515.5	-1.0%	-1.0%
TOTAL	**1,825.1**	**1,826.3**	**55.2**	**55.3**	**1,770.0**	**1,771.0**		

Notes:

1. 2024 Prices

Table 14: Impact of Proposed Development - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	231.5	243.3	5.8	6.0	225.6	237.3	-2.5%	-2.5%
Tanbridge Retail Park	19.4	20.4	0.0	0.0	19.4	20.4	0.0%	0.0%
TOTAL Horsham Town Centre	250.9	263.7	5.8	6.0	245.0	257.7	-2.3%	-2.3%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	18.2	19.1	0.0	0.0	18.2	19.1	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	4.2	4.4	0.0	0.0	4.2	4.4	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	18.0	18.9	4.0	4.1	13.9	14.7	-22.5%	-22.0%
Other Out of Centre	35.2	37.0	0.0	0.0	35.2	37.0	0.0%	0.0%
TOTAL Horsham Out of Centre	75.6	79.5	4.0	4.1	71.6	75.4	-5.4%	-5.2%
Other Destinations								
TOTAL Other Destinations	1938.5	2037.8	5.7	5.9	1932.8	2031.9	-0.3%	-0.3%
TOTAL	**2265.1**	**2381.1**	**15.6**	**16.0**	**2249.4**	**2365.0**		

Notes:

1. 2024 Prices

Table 15: Total Impact of Proposed Development on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	358.7	371.6	21.0	21.2	337.7	350.4	-5.9%	-5.7%	6.79	2.0%

Notes:

1. 2024 Prices

Table 16: Turnover of Approved Fallback Scheme

Unit	Gross Internal Area (sq. m)	Gross to Net Ratio	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
						2025	2028	2030
Convenience								
Foodstore	6,000	85%	70%	3,570	12,745	45.5	45.6	45.7
Local Facilities	400	90%	0%	0	-	-	-	-
Total	6,400			3,570		45.5	45.6	45.7
Comparison								
Foodstore	6,000	85%	30%	1,530	6,867	10.5	11.2	11.8
Local Facilities	400	90%	100%	360	5,724	2.1	2.2	2.3
Total	6,400			1,890		12.6	13.4	14.1
Total Turnover						**58.1**	**59.1**	**59.8**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys, M&S Food, Aldi and Lidl obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (December 2024)
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Table 17: Impact of Approved Fallback Scheme - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	65.4	65.5	10.9	10.9	54.6	54.6	-16.6%	-16.6%
Waitrose, Albion Way, Horsham, RH12 1AJ	23.2	23.2	1.5	1.5	21.7	21.7	-6.5%	-6.5%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.2	6.2	0.1	0.1	6.0	6.0	-2.2%	-2.2%
Other Town Centre Shops	13.0	13.0	0.2	0.2	12.8	12.8	-1.4%	-1.4%
TOTAL Horsham Town Centre	107.8	107.9	12.5	12.5	95.3	95.3	-11.6%	-11.6%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	94.3	94.3	14.8	14.9	79.4	79.5	-15.7%	-15.8%
Lidl, Foundry Lane, Horsham, RH13 5PX	39.0	39.1	0.0	0.0	39.0	39.1	0.0%	0.0%
Other Out of Centre	3.0	3.0	0.0	0.0	3.0	3.0	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.3	16.3	3.2	3.2	13.1	13.1	-19.6%	-19.7%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.4	1.4	4.6	4.6	-22.8%	-22.8%
TOTAL Horsham Out of Centre	158.6	158.7	20.8	20.8	137.9	137.9	-13.1%	-13.1%
Horsham Local Shops								
TOTAL Local Shops	29.3	29.4	0.0	0.0	29.3	29.4	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,529.3	1,530.3	12.2	12.2	1,517.2	1,518.1	-0.8%	-0.8%
TOTAL	**1,825.1**	**1,826.3**	**45.5**	**45.5**	**1,779.6**	**1,780.7**		

Notes:

1. 2024 Prices

Table 18: Impact of Approved Fallback Scheme - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	231.5	243.3	5.0	5.1	226.5	238.2	-2.2%	-2.1%
Tanbridge Retail Park	19.4	20.4	0.0	0.0	19.4	20.4	0.0%	0.0%
TOTAL Horsham Town Centre	250.9	263.7	5.0	5.1	245.9	258.6	-2.0%	-2.0%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	18.2	19.1	0.0	0.0	18.2	19.1	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	4.2	4.4	0.0	0.0	4.2	4.4	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	18.0	18.9	3.5	3.6	14.5	15.3	-19.3%	-18.9%
Other Out of Centre	35.2	37.0	0.0	0.0	35.2	37.0	0.0%	0.0%
TOTAL Horsham Out of Centre	75.6	79.5	3.5	3.6	72.2	75.9	-4.6%	-4.5%
Other Destinations								
TOTAL Other Destinations	1,938.5	2037.8	4.9	5.1	1,933.6	2,032.8	-0.3%	-0.2%
TOTAL	**2,265.1**	**2381.1**	**13.4**	**13.8**	**2,251.6**	**2,367.3**		

Notes:

1. 2024 Prices

Table 19: Total Impact of Approved Fallback Scheme on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Draw to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	358.7	371.6	17.5	17.7	341.2	353.9	-4.9%	-4.8%	10.30	3.0%

Notes:

1. 2024 Prices

APPENDIX 3.0
RETAIL IMPACT ASSESSMENT TABLES – POPULATION SENSITIVITY TEST

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 1: Population

Zone	Population		
	2025	2028	2030
1	107,487	110,158	111,940
2	65,746	65,901	66,005
3	115,485	116,275	116,801
4	114,923	116,490	117,534
5	97,504	98,628	99,376
6	27,529	28,116	28,508
7	22,005	22,481	22,799
8	6,139	6,289	6,389
Total	**556,818**	**564,338**	**569,352**

Notes:

1. Population taken from Appendix F Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (Augus
3. No additional allowance made for additional residential population coming forward in Zone 1.
3. Application Site falls within Zone 1

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 2A: Per Capita Expenditure Including SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,501	3,459	3,439
2	3,755	3,711	3,688
3	2,963	2,927	2,910
4	3,530	3,488	3,467
5	3,338	3,298	3,278
6	3,856	3,810	3,787
7	3,513	3,471	3,450
8	3,966	3,918	3,895

Notes:

1. 2024 per capita expenditure taken Appendix F Table 2 of Broadbridge Heath Depot Retail Assessment Adden
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 2B: Per Capita Expenditure Excluding SFT - Convenience

Zone	Per Capita Expenditure (£)		
	2025	2028	2030
1	3,319	3,262	3,232
2	3,560	3,499	3,467
3	2,809	2,761	2,735
4	3,347	3,289	3,259
5	3,164	3,110	3,081
6	3,656	3,593	3,560
7	3,330	3,273	3,243
8	3,759	3,695	3,661

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 3A: Per Capita Expenditure Including SFT - Comparison

Zone	2025	2028	2030
1	5,242	5,579	5,861
2	5,535	5,891	6,189
3	4,029	4,288	4,505
4	5,267	5,606	5,889
5	4,706	5,008	5,262
6	5,691	6,057	6,364
7	5,250	5,587	5,870
8	5,777	6,148	6,460

Notes:

1. 2024 per capita expenditure taken Appendix F Table 4 of Broadbridge Heath Depot Retail Assessment Addend
2. Grown in accordance with Figure 1a and 1b, Retail Planner Briefing Note 22 (March 2025)
3. 2024 Prices

Table 3B: Per Capita Expenditure Excluding SFT - Comparison

Zone	2025	2028	2030
1	3,979	4,173	4,343
2	4,201	4,406	4,586
3	3,058	3,208	3,339
4	3,998	4,193	4,364
5	3,572	3,746	3,899
6	4,320	4,531	4,716
7	3,985	4,179	4,350
8	4,385	4,599	4,787

Notes:

1. SFT deductions based as per Appendix 3 Figure 5, Retail Planner Briefing Note 22 (March 2025)
2. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 4: Total Available Convenience Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	356.8	359.4	361.8
2	234.1	230.6	228.8
3	324.4	321.0	319.5
4	384.6	383.2	383.1
5	308.5	306.7	306.2
6	100.6	101.0	101.5
7	73.3	73.6	73.9
8	23.1	23.2	23.4
Total	**1,805.4**	**1,798.7**	**1,798.3**

Notes:

1. Excluding SFT
2. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 5: Total Available Comparison Expenditure

Zone	Total Expenditure (£m)		
	2025	2028	2030
1	427.7	459.7	486.2
2	276.2	290.4	302.7
3	353.2	373.0	389.9
4	459.4	488.4	512.9
5	348.3	369.5	387.5
6	118.9	127.4	134.4
7	87.7	94.0	99.2
8	26.9	28.9	30.6
Total	**2,098.2**	**2,231.3**	**2,343.4**

Notes:

1. Excluding SFT
2. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 6: Turnover of Proposed Development

Unit	Total Sales Floorspace (sq. m)	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
					2025	2028	2030
Convenience							
Foodstore	6,000	70%	4,200	12,745	53.5	53.7	53.8
Local Facilities	400	0%	0	-	-	-	-
Total	6,400		4,200		53.5	53.7	53.8
Comparison							
Foodstore	6,000	30%	1,800	6,867	12.4	13.2	13.9
Local Facilities	400	100%	400	5,724	2.3	2.4	2.6
Total	6,400		2,200		14.6	15.7	16.4
Total Turnover					**68.2**	**69.3**	**70.2**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys, M&S Food, Aldi and Lidl obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (December 2024)
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 7: Convenience Market Shares

	Market Share (%)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	17.1%	1.0%	1.0%	0.0%	0.0%	1.0%	0.0%	4.0%
Waitrose, Albion Way, Horsham, RH12 1AJ	5.7%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	6.0%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Town Centre Shops	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Town Centre	28.0%	1.0%	1.0%	0.0%	0.0%	2.0%	0.0%	9.9%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	21.0%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	10.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Other Out of Centre	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL Horsham Out of Centre	32.6%	7.0%	1.0%	0.0%	0.0%	0.0%	0.0%	11.9%
Horsham Local Shops								
TOTAL Local Shops	7.0%	0.0%	0.3%	0.0%	0.5%	0.0%	0.4%	0.0%
Other Destinations								
TOTAL Other Destinations	32.3%	92.0%	97.7%	100.0%	99.5%	98.0%	99.6%	78.1%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix D Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 8: Comparison Market Shares

	Market Share (%)							
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**
Horsham In Centre								
Horsham Town Centre	36.1%	6.4%	2.0%	1.3%	2.3%	8.8%	0.7%	13.4%
Tanbridge Retail Park	2.9%	0.7%	0.0%	0.2%	0.1%	1.0%	0.0%	2.3%
TOTAL Horsham Town Centre	39.0%	7.1%	2.0%	1.5%	2.4%	9.8%	0.7%	15.7%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	2.5%	1.5%	0.2%	0.0%	0.0%	0.5%	0.0%	1.9%
Lidl, Foundry Lane, Horsham, RH13 5PX	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	2.2%	0.7%	0.0%	0.0%	0.0%	1.8%	0.0%	2.7%
Other Out of Centre	3.7%	1.6%	0.3%	0.1%	0.4%	6.7%	0.3%	4.0%
TOTAL Horsham Out of Centre	9.3%	3.8%	0.5%	0.1%	0.4%	9.0%	0.3%	8.6%
Other Destinations								
TOTAL Other Destinations	51.7%	89.1%	97.5%	98.4%	97.2%	81.2%	99.0%	75.7%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

1. Market shares obtained from Appendix E Table 1 of Broadbridge Heath Depot Retail Assessment Addendum (August 2024), prepared by LSH

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 9: Existing Convenience Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Aldi, Tanbridge Retail Park (£m)	Trade Diversion to Lidl, Broadbridge Heath (£m)	Turnover at 2025 inc. Aldi & Lidl (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
						2028	2030
Horsham Town Centre							
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	68.40	-6.00	-0.90	61.49	0.03	61.26	61.25
Waitrose, Albion Way, Horsham, RH12 1AJ	22.68	-0.50	-0.30	21.88	0.01	21.80	21.80
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	6.41	-0.50	-0.15	5.76	0.00	5.74	5.74
Other Town Centre Shops	12.46	-0.10	-0.15	12.21	0.01	12.17	12.16
TOTAL Horsham Town Centre	109.95	-7.10	-1.51	101.34	0.06	100.97	100.95
Horsham Out of Centre							
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	96.89	-5.00	-2.41	89.48	0.05	89.15	89.13
Lidl, Foundry Lane, Horsham, RH13 5PX	39.04	-1.00	-1.51	36.53	0.02	36.40	36.39
Other Out of Centre	2.85			2.85	0.00	2.84	2.84
Aldi, Tanbridge Retail Park	0.00	16.30		16.30	0.01	16.24	16.24
Lidl, Broadbridge Heath Retail park	0.00		6.03	6.03	0.00	6.01	6.01
TOTAL Horsham Out of Centre	138.78	10.30	2.11	151.20	0.08	150.64	150.60
Horsham Local Shops							
TOTAL Local Shops	27.74			27.74	0.02	27.64	27.63
Other Destinations							
TOTAL Other Destinations	1,528.88	-3.20	-0.60	1,525.08	0.84	1,519.43	1,519.09
TOTAL	**1,805.35**	**0.00**	**0.00**	**1,805.35**	**1.00**	**1,798.67**	**1,798.26**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Aldi, Tanbridge Retail Park and Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. Aldi turnover based on net sales floorspace from Application Ref. DC/21/1413 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
5. Lidl turnover based on net sales floorspace from Application Ref. DC/23/1133 and benchmark sales density from Global Data Company Performance Metrics (July 2024)
6. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 10: Existing Comparison Turnovers

	Total Turnover at 2025 (£m)	Trade Diversion to Broadbridge Heath Development (£m)	2025 Turnover inc. Broadbridge Heath Development (£m)	Adjusted Market Share (%)	Total Turnover (£m)	
					2028	2030
Horsham In Centre						
Horsham Town Centre	207.62	-0.58	207.03	0.10	220.16	231.23
Tanbridge Retail Park	17.40	0.00	17.40	0.01	18.50	19.43
TOTAL Horsham Town Centre	225.02	-0.58	224.43	0.11	238.66	250.66
Horsham Out of Centre						
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	16.64	-0.25	16.39	0.01	17.43	18.30
Lidl, Foundry Lane, Horsham, RH13 5PX	3.85	-0.14	3.71	0.00	3.94	4.14
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	14.20	2.05	16.25	0.01	17.28	18.15
Other Out of Centre	32.44	-0.42	32.02	0.02	34.05	35.76
TOTAL Horsham Out of Centre	67.12	1.25	68.37	0.03	72.70	76.35
Other Destinations						
TOTAL Other Destinations	1,806.12	-0.66	1,805.45	0.86	1,919.90	2,016.42
TOTAL	**2,098.25**	**0.00**	**2,098.25**	**1.00**	**2,231.25**	**2,343.42**

Notes:

1. Turnovers grown in accordance with Table 4 and constant market shares
2. Market shares adjusted based on ME judgement to take into account Lidl, Broadbridge Heath
3. Market shares adjusted based on Application Ref. DC/23/1133 Retail Assessment Addendum (August 2024), prepared by LSH
4. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 11: Convenience Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	37.6	37.7
Zone 2	10%	5.4	5.4
Zone 3	5%	2.7	2.7
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	2.7	2.7
Zone 7	0%	0.0	0.0
Zone 8	5%	2.7	2.7
Outside Catchment	5%	2.7	2.7
Total	**100.0%**	**53.7**	**53.8**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 12: Comparison Trade Draw of Proposed Development

	Trade Draw (%)	Trade Draw (£m)	
		2028	2030
Zone 1	70%	11.0	11.5
Zone 2	10%	1.6	1.6
Zone 3	5%	0.8	0.8
Zone 4	0%	0.0	0.0
Zone 5	0%	0.0	0.0
Zone 6	5%	0.8	0.8
Zone 7	0%	0.0	0.0
Zone 8	5%	0.8	0.8
Outside Catchment	5%	0.8	0.8
Total	**100.0%**	**15.7**	**16.4**

Notes:

1. Trade draws based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 13: Impact of Proposed Development - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	61.3	61.2	12.8	12.8	48.5	48.4	-20.9%	-20.9%
Waitrose, Albion Way, Horsham, RH12 1AJ	21.8	21.8	1.8	1.8	20.0	20.0	-8.1%	-8.1%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	5.7	5.7	0.2	0.2	5.6	5.6	-2.8%	-2.8%
Other Town Centre Shops	12.2	12.2	0.2	0.2	12.0	11.9	-1.8%	-1.8%
TOTAL Horsham Town Centre	101.0	100.9	14.7	14.7	86.3	86.2	-14.6%	-14.6%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	89.1	89.1	17.4	17.5	71.7	71.6	-19.6%	-19.6%
Lidl, Foundry Lane, Horsham, RH13 5PX	36.4	36.4	0.0	0.0	36.4	36.4	0.0%	0.0%
Other Out of Centre	2.8	2.8	0.0	0.0	2.8	2.8	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.2	16.2	3.8	3.8	12.5	12.5	-23.1%	-23.2%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.6	1.6	4.4	4.4	-26.8%	-26.9%
TOTAL Horsham Out of Centre	150.6	150.6	24.4	24.5	126.2	126.1	-16.2%	-16.3%
Horsham Local Shops								
TOTAL Local Shops	27.6	27.6	0.0	0.0	27.6	27.6	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,519.4	1,519.1	14.3	14.4	1,505.1	1,504.7	-0.9%	-0.9%
TOTAL	**1,798.7**	**1,798.3**	**53.5**	**53.6**	**1,745.2**	**1,744.7**		

Notes:

1. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 14: Impact of Proposed Development - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	220.2	231.2	5.9	6.0	214.3	225.2	-2.7%	-2.6%
Tanbridge Retail Park	18.5	19.4	0.0	0.0	18.5	19.4	0.0%	0.0%
TOTAL Horsham Town Centre	238.7	250.7	5.9	6.0	232.8	244.7	-2.5%	-2.4%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	17.4	18.3	0.0	0.0	17.4	18.3	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	3.9	4.1	0.0	0.0	3.9	4.1	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	17.3	18.2	4.1	4.2	13.2	14.0	-23.5%	-22.9%
Other Out of Centre	34.0	35.8	0.0	0.0	34.0	35.8	0.0%	0.0%
TOTAL Horsham Out of Centre	72.7	76.4	4.1	4.2	68.6	72.2	-5.6%	-5.4%
Other Destinations								
TOTAL Other Destinations	1919.9	2016.4	5.7	5.9	1914.2	2010.5	-0.3%	-0.3%
TOTAL	**2231.3**	**2343.4**	**15.7**	**16.0**	**2215.6**	**2327.4**		

Notes:

1. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 15: Total Impact of Proposed Development on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Draw to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	339.6	351.6	20.6	20.7	319.1	330.9	-6.1%	-5.9%	5.08	1.6%

Notes:

1. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 16: Turnover of Approved Fallback Scheme

Unit	Gross Internal Area (sq. m)	Gross to Net Ratio	Convenience/ Comparison Split	Net Sales Area (sq. m)	Sales Density at 2025 (£ per sq. m)	Turnover (£m)		
						2025	2028	2030
Convenience								
Foodstore	6,000	85%	70%	3,570	12,745	45.5	45.6	45.7
Local Facilities	400	90%	0%	0	-	-	-	-
Total	6,400			3,570		45.5	45.6	45.7
Comparison								
Foodstore	6,000	85%	30%	1,530	6,867	10.5	11.2	11.8
Local Facilities	400	90%	100%	360	5,724	2.1	2.2	2.3
Total	6,400			1,890		12.6	13.4	14.1
Total Turnover						**58.1**	**59.1**	**59.8**

Notes:

1. Foodstore sales density based on average of Tesco, Asda, Morrisons, Sainsburys, M&S Food, Aldi and Lidl obtained from Global Data Convenience and Comparison Goods Sales Densities of Major Grocers (December 2024)
2. Local facilities sales density based on Land North of Horsham Retail Statement, prepared by Peter Brett Associates (Ref. DC/16/1677)
3. Turnovers grown in accordance with Figure 3a, Retail Planner Briefing Note 22 (March 2025)
4. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 17: Impact of Approved Fallback Scheme - Convenience

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham Town Centre								
Sainsbury's Superstore, Worthing Road, Horsham, RH12 1SQ	61.3	61.2	10.9	10.9	50.4	50.4	-17.7%	-17.8%
Waitrose, Albion Way, Horsham, RH12 1AJ	21.8	21.8	1.5	1.5	20.3	20.3	-6.9%	-6.9%
Marks and Spencer (M&S), Medwin Way, Swan Walk, Horsham, RH12 1YX	5.7	5.7	0.1	0.1	5.6	5.6	-2.4%	-2.4%
Other Town Centre Shops	12.2	12.2	0.2	0.2	12.0	12.0	-1.5%	-1.5%
TOTAL Horsham Town Centre	101.0	100.9	12.5	12.5	88.5	88.4	-12.4%	-12.4%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	89.1	89.1	14.8	14.9	74.3	74.3	-16.6%	-16.7%
Lidl, Foundry Lane, Horsham, RH13 5PX	36.4	36.4	0.0	0.0	36.4	36.4	0.0%	0.0%
Other Out of Centre	2.8	2.8	0.0	0.0	2.8	2.8	0.0%	0.0%
Aldi, Tanbridge Retail Park	16.2	16.2	3.2	3.2	13.0	13.0	-19.7%	-19.7%
Lidl, Broadbridge Heath Retail park	6.0	6.0	1.4	1.4	4.6	4.6	-22.8%	-22.8%
TOTAL Horsham Out of Centre	150.6	150.6	20.8	20.8	129.9	129.8	-13.8%	-13.8%
Horsham Local Shops								
TOTAL Local Shops	27.6	27.6	0.0	0.0	27.6	27.6	0.0%	0.0%
Other Destinations								
TOTAL Other Destinations	1,519.4	1,519.1	12.2	12.2	1,507.2	1,506.9	-0.8%	-0.8%
TOTAL	**1,798.7**	**1,798.3**	**45.5**	**45.5**	**1,753.2**	**1,752.7**		

Notes:

1. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 18: Impact of Approved Fallback Scheme - Comparison

	Pre-Development Turnover (£m)		Trade Diversion to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)	
	2028	2030	2028	2030	2028	2030	2028	2030
Horsham In Centre								
Horsham Town Centre	220.2	231.2	5.0	5.1	215.1	226.1	-2.3%	-2.2%
Tanbridge Retail Park	18.5	19.4	0.0	0.0	18.5	19.4	0.0%	0.0%
TOTAL Horsham Town Centre	238.7	250.7	5.0	5.1	233.6	245.5	-2.1%	-2.1%
Horsham Out of Centre								
Tesco Extra, Wickhurst Lane, Broadbridge Heath, Horsham, RH12 3YU	17.4	18.3	0.0	0.0	17.4	18.3	0.0%	0.0%
Lidl, Foundry Lane, Horsham, RH13 5PX	3.9	4.1	0.0	0.0	3.9	4.1	0.0%	0.0%
Broadbridge Heath Retail Park, Broadbridge Way, Broadbridge Heath	17.3	18.2	3.5	3.6	13.8	14.6	-20.1%	-19.6%
Other Out of Centre	34.0	35.8	0.0	0.0	34.0	35.8	0.0%	0.0%
TOTAL Horsham Out of Centre	72.7	76.4	3.5	3.6	69.2	72.8	-4.8%	-4.7%
Other Destinations								
TOTAL Other Destinations	1,919.9	2016.4	4.9	5.1	1,915.0	2,011.4	-0.3%	-0.3%
TOTAL	**2,231.3**	**2343.4**	**13.4**	**13.8**	**2,217.8**	**2,329.7**		

Notes:

1. 2024 Prices

Retail Impact Assessment - Sensitivity Test
Mowbray, Horsham

Table 19: Total Impact of Approved Fallback Scheme on Horsham Town Centre

	Pre-Development Turnover (£m)		Trade Draw to Proposed Development (£m)		Post-Development Turnover (£m)		Impact (%)		Turnover Growth from 2025 to 2030	
	2028	2030	2028	2030	2028	2030	2028	2030	(£m)	(%)
Horsham Town Centre	339.6	351.6	17.5	17.7	322.1	333.9	-5.2%	-5.0%	-9.69	-2.8%

Notes:

1. 2024 Prices

APPENDIX 4.0
HORSHAM TOWN CENTRE HEALTH CHECK

HEALTH CHECK ASSESSMENT

CENTRE:	**Horsham**
LOCAL AUTHORITY:	**Horsham District Council**
DATE UNDERTAKEN:	**02/05/2025**

Diversity Of Uses

Horsham Town Centre includes several major national retailers, anchored by key shopping retailers such as Marks & Spencer and Boots, that provide both convenience and comparison goods. West Street is the main traditional high street, offering a mix of national and independent retailers in a pedestrian-friendly environment. Swan Walk Shopping Centre, built in the 1970s and occupying a central location, connects to East Street and Carfax and includes a range of national retailers.

Piries Place (Image 2.0 below) also offers an open-air retail and leisure area, recently re-developed, featuring restaurants, a cinema, and smaller retail units.

Horsham hosts several regular markets that support footfall and local trade, including:

- Carfax Local Market: An international street food, local produce, boutique and artisan stalls. Takes place every Thursday, Friday and Saturday (Image 3.0 below).
- West Street Entrepreneurs Market: Fresh produce and start-up business stalls. Takes place every Thursday and Saturday.
- West Street Arts and Crafts Market: Antiques, vintage goods, handmade crafts, and entertainment. Occurs on the last Sunday of every month.
- Piries Place Vegan Market Vegan-focused goods and food. Occurs on the last Saturday of every month, except December.



Image 1.0: Entrance to Swan Walk.



Image 2.0: Piries Place

The centre performs well, with a balanced offer of convenience and comparison shopping, supported by regular markets and a mix of retail formats.



Image 3.0: Carfax Local Market

Proportion Of Vacant Street-Level Property

The site visit identified 20 vacant retail units, equating to approximately 4.77% of the total ground floor retail stock within the defined town centre. This represents a low vacancy rate compared to the national average of 19.6% (Experian Retail Planner Briefing Note, March 2025) and indicates a generally healthy retail environment. The PMA Horsham PROMIS Retail Report (October 2025) shows that the vacancy rate within Horsham Town Centre has fallen each year since 2021, whilst the national average has increased.

The majority of vacancies were observed on the periphery of the Primary Shopping Area, particularly in less prominent side streets and secondary frontages. A number of vacant units were also located within Swan Walk Shopping Centre.

In contrast, West Street, which functions as the main high street and retail core, had notably low vacancy, with the vast majority of units occupied and trading. This reflects strong tenant demand and high footfall in this part of the centre.

Overall, the current level and distribution of vacancies suggest that the core areas of Horsham town centre remain commercially resilient, with vacancy more concentrated in locations of lower pedestrian activity.

Commercial Yields On Non-Domestic Property

There is limited up-to-date information available in relation to commercial yield on non-domestic property for Horsham Town Centre.

Customers' Experience And Behaviour

Pedestrian activity within Horsham town centre is concentrated primarily along West Street, which acts as the main retail spine and experiences the highest levels of footfall. West Street benefits from its central location, strong retail offer, and good pedestrian accessibility. The area also offers outside seating, enhancing customer experience.

Signage across the town centre is present but could benefit from improvements to enhance wayfinding, particularly for visitors unfamiliar with the area and for encouraging movement between key zones such as the station, Swan Walk, Piries Place, and Carfax.



Image 4.0: Public Realm Improvements and Landscaping.

The results from the 2017 Horsham Town Retail and Leisure Study suggest that the majority of visitors drive to the Town Centre, although 25.2% accessed the centre on foot. The main aspects of the centre that visitors liked were the good range of shops as well as the layout of the shops and the attractive environment. Negatives of the centre were seen as being the lack of choice of shops, including independent and specialist stores, as well as the cost of parking.

Retailer Representation And Intentions To Change Representation

Retail provision in Horsham Town Centre reflects a typical mix of uses and retailers, commonly found within similar town centre environments. There is a balanced representation of national multiples and independent retailers, contributing to a diverse retail offer.

The Town Centre offers a number of smaller, independent businesses, including cafés, particularly around the Carfax area.

There are currently no large vacant units within the centre, indicating relatively strong retailer demand and stability in larger units. However, the Trespass store is in the process of closing down, which may soon present an opportunity for reoccupation for a new or expanding retailer.

The presence of independent businesses alongside national brands helps maintain Horsham's character, while vacancy trends suggest a relatively stable retail core with ongoing demand for centrally located premises.

Commercial Rents

Zone A rents within Horsham Town Centre were around £75 per square foot in mid-2025, which implies a change in prime rents since 2017 of -16.7%. This fall in rents is significantly lower than the national average of -34.1%, indicating that prime rents in Horsham Town Centre are significantly stronger than average. (Source: PMA Horsham PROMIS Retail Report, October 2025).

Pedestrian Flows

Pedestrian flows in Horsham Town Centre are generally strong and concentrated in key areas.

High pedestrian activity centres along west Street, the main pedestrian spine of the town, with the highest footfall due to its concentration of national retailers, cafés, and its central location. Pedestrian flows around Carfax central public space were also strong, particularly surrounding the market activity.

Pedestrian flows within the Swan Walk Shopping Centre and around Piries Place were limited, albeit this could be due to the time of Site Visit during a weekday.



Image 5.0: East Street looking towards the town centre.

Lower pedestrian activity also occurred on the periphery of the centre, to the northwest (Bishopric Road area), dropping noticeably beyond Albion Way (B2237), where retail offering is lower. Similarly, there was limited pedestrian footfall between the railway station and the Primary Shopping Area of the Town Centre.

Accessibility – This Includes Transport Accessibility And Accessibility For People With Different Impairments Or Health Conditions, As Well As Older People With Mobility Requirements.

Horsham benefits from strong transport connectivity, supporting pedestrian access into the town centre:

- Road Access and Parking: The town is well connected to the surrounding road network, including the A24 and A264. Piries Place Car Park, located centrally, provides convenient parking for visitors and contributes to steady footfall in the adjacent retail and leisure areas.
- Rail Connectivity: Horsham Train Station is located approximately 0.5 miles (around 12 minutes' walk) from the town centre. It provides direct rail services to London and other key destinations, offering good potential for commuter and visitor access. However, observed pedestrian flows between the station and the town centre remain limited, suggesting potential for improvement.
- Bus Services: Horsham Bus Station is well integrated within the town centre, facilitating ease of access for residents from surrounding areas. Its central location supports consistent foot traffic throughout the core retail zone.
- Cycle / on foot – the survey undertaken for the 2017 Retail Study suggested that a large proportion of residents walk to the centre. The Town Centre is close the surrounding residential areas, providing a real opportunity for residents to walk or cycle. Cycle parking facilities are provided throughout the centre.

Perception Of Safety And Occurrence Of Crime

According to Police.co.uk, in the area that Horsham is located (Denne and Forest), there were 126 reported crimes in February 2025. This included:

- Shoplifting – 44 crimes reported,
- Violence and sexual offences – 27 crimes reported,
- Anti-social behaviour – 15 crimes reported and
- Other theft – 10 crimes reported.

Overall, the area was perceived positively in terms of safety, with a general sense of comfort and security. Limited incidents of crime or graffiti were observed at the time of the site visit.

State Of Town Centre Environmental Quality

Horsham Town Centre benefits from a high-quality environment, well-preserved historical architecture and the presence of period buildings contributes to a strong sense of place (Image 6.0).

Public spaces appeared well-maintained, with clean streets, appropriate landscaping, and a good standard of street furniture. There was also evidence of public realm improvements towards the north of the centre. Pedestrianised areas, such as West Street and East Street, provide a comfortable and attractive setting for visitors and shoppers.

The town centre's mix of heritage character and improvements such as the redevelopment of Piries Place, results in a visually cohesive and inviting environment.



Image 6.0: View of Market Square

Balance Between Independent And Multiple Stores

There is a strong presence of key national retailers including Boots, H&M, Next, JD Sports, John Lews and Waitrose. This is complemented by a notable presence of independent stores and cafes.

Extent To Which There Is Evidence Of Barriers To New Businesses Opening And Existing Businesses Expanding

Recent activity indicates positive occupier movement, with new businesses continuing to enter the market and occupy vacant units. Nando's has recently opened a restaurant on East Street, contributing to the growing food and beverage offer within the centre.

Many of the vacant units are smaller units, below 200sqm. The closure of the Trespass store, located along West Street, presents an opportunity for other businesses to enter the market and take advantage of a newly vacated retail space.

Opening Hours/Availability/Extent To Which There Is An Evening And Night-time Economy Offer

Horsham Town Centre supports both daytime and evening economic activity. East Street provides a number of restaurants, and several public houses across the centre contribute to daytime and evening economies. The presence of an 'Everyman' cinema at Piries Place also contributes to night-time footfall, alongside other food and leisure operators.

The centre provides for a more leisure-led evening activity rather than late-night entertainment.

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