

Survey results:

Regis Centre and Hothamton Development in Bognor Regis [Comparison of survey results]

January 2013



1. BACKGROUND

- 1.1 Arun District Council consulted on the principles for development of the Regis Centre site, Alexandra Theatre, and Hothampton site in Bognor Regis. The proposals have been developed by St. Modwen Properties, the UK's leading regeneration specialist and the Council's development partner for these sites. St. Modwen is looking to invest approximately £40 million in the town. The stated benefits of the scheme include: approximately 200 permanent new jobs on the Regis Centre site; the creation of cafes, bars, restaurants, modern theatre and cinema facilities, plus enhanced public spaces to make the town centre more attractive to both local residents and tourists.¹ These proposals took into account the views expressed at the original public consultation on these sites in 2007.
- 1.2 Given the scale of the proposed development and its potential to affect existing businesses within the town², the Council undertook a series of consultation activities with residents in late 2012. These were all planned before the start of the consultation period and are described below:
- 1.2.1 A 'Public Survey'³. This covered responses to an online survey on the ADC website; to printed survey forms available at exhibitions, reception areas, libraries etc; and to leaflets delivered to households in the Bognor Regis area.
- 1.2.2 The consultation carried in 1.2.1 was seen as valuable as it gave every local resident the opportunity to participate in the consultation process. However, those taking part may not be truly representative of the target population as those with strong views, either in favour or against the proposals, are more likely to take the time to respond⁴. Therefore a 'Sample Survey'⁵ was carried out. This comprised a face to face survey of a representative sample of local residents carried out by independent market research agency Qa Research Ltd.
- 1.2.3 A 'Panel Survey'⁶. A survey of Arun District Council's "Wavelength" residents' panel was carried out by the panel's managing agency, independent market research agency BMG Research Ltd. The Wavelength panel is consulted on all major potential developments within the Arun District. Although the St. Modwen proposals relate to sites in Bognor Regis, the potential benefits of the investment will be felt across the Arun District hence it was seen as important to consult with the whole panel. This report, and the full Wavelength report, show separate responses for Western Area panel members (i.e. Greater Bognor Regis area) and for panel members living in the four wards that make up

¹ Extract from "Your town, your future, your say" leaflet available during the consultation.

² For example, the proposal to build a new multi-screen cinema has been seen as a potential threat to the town's existing 'Picturedrome' cinema.

³ 4,217 valid responses analysed

⁴ Those without strong views are less likely to participate, leading to 'non-response bias'. Additionally, those with strong views may form groups encouraging others to respond in a certain way. Non-probability sampling in this survey cannot be used to infer from the sample to the general population, hence the decision to also carry out a sample survey.

⁵ To ensure that a representative sample of local residents gave their views on the proposed developments, a face to face survey was carried out with a representative sample of 500 local residents. A total of 519 responses were received.

⁶ 362 responses were received.

Bognor Regis town.

- 1.3 This report compares the results of the three surveys. Separate full reports are available for each survey. These full reports outline the methodology in detail.

2. EXECUTIVE SUMMARY

- 2.1 There is strong support for investment in the Alexandra Theatre across all surveys and investment as proposed being the favoured option across all three surveys. The representative sample survey shows considerably more support for the proposed investment in the Alexandra Theatre (71% compared with 54% for Wavelength and 49% for the public survey). Public survey respondents are more likely than others to want some investment, but not as proposed (27%, compared with 9% for the sample survey and 16% for Wavelength). 59% of Western Area Wavelength panellists and 54% of Bognor Regis panellists support the proposed investment.
- 2.2 Support for the cinema differed across all three surveys. Wavelength respondents who expressed an opinion are two to one in favour of a cinema (58% to 29%), public survey respondents are more likely to oppose than support a cinema, with 39% supporting and 54% opposing a cinema⁷. Sample survey respondents' views fall between the other samples with 44% supporting and 48% opposing. 55% of Western Area panellists and 56% of Bognor Regis panellists are in favour of a cinema. Across all three surveys there was stronger support for a cinema from the under 35 age groups.
- 2.3 Whilst 47% of Wavelength Panellists feel that a new 80 bedroom hotel on the Regis Centre site will benefit the town centre, only 39% of the public survey and 34% of the sample survey share this view. 55% of Western Area panellists and 56% of Bognor Regis panellists that a new hotel would benefit the town centre.
- 2.4 Levels of support and opposition was broadly even across the surveys with regards the residential development. The proposal to include approximately 80 apartments on the Regis Centre site drew similar levels of support across all three surveys. The percentages in support for the public survey, sample survey, and Wavelength survey were 40%, 42% and 44% respectively. 49% of Western Area panellists and 45% of Bognor Regis panellists supported the proposed apartments. The percentages opposed were 43% for the public survey; 42% for the sample survey, and 26% for Wavelength
- 2.5 There is strong support across the three consultation groups for new places to eat and drink on the Regis Centre site, with around two in three respondents in favour for each group (65% for the public survey; 70% for the sample survey; and 68% for the Wavelength Panel). The level of support is slightly higher for Wavelength's Western Area and Bognor Regis town respondents (72% and 78% respectively).
- 2.6 Asked to select from a list of options for improvements to Place St Maur, preferences are broadly similar for all three groups, with public seating and outdoor markets mentioned by the majority of respondents for all three surveys
- 2.7 Whilst only 44% of public survey consultees supported the car parking proposals, 70% of sample survey respondents gave their support. 55% of the Wavelength supported the

⁷ Although a majority (53%) of under 35 year old respondents support a cinema

proposals (63% of Western Area panellists and 63% of Bognor Regis panellists).

It must be noted that this question did not address the quantity of car parking available in the town centre in general, and focused specifically on the parking proposals relating to the Regis Centre site. Feedback, particularly from the public survey, has indicated that adequate car parking is of particular concern to town centre visitors and residents.

- 2.8 Only around two in five support the proposed residential accommodation on the Hothampton site (38% for the public survey; 38% for the sample survey; and 41% for the Wavelength Panel). Looking at Wavelength Panel results, 47% of Western Area panellists and 48% of Bognor Regis panellists support the proposal. The percentages opposed were 45% for the public survey; 51% for the sample survey, and 38% for Wavelength
- 2.9 All three consultations show similar results for the proportions viewing a 6 storey development as acceptable (43% for the public survey; 45% for the sample survey; and 44% for the Wavelength Panel). 50% of Western Area panellists and 56% of Bognor Regis panellists view 6 stories as acceptable.
- 2.10 Asked to select from a list of potential uses at street level along Queensway, preferences are broadly similar for all three groups, with shops and restaurants mentioned by the majority of respondents for all three consultations. Cafes were also selected by around half of each group.
- 2.11 For the public survey and sample survey, those preferring a supermarket on this site outweighed those preferring residential. In contrast, more of the Wavelength Panel opt for residential over a supermarket.
- 2.12 55% of the representative sample survey respondents are satisfied⁸ with the mix of uses proposed for the Regis Centre site, the corresponding percentages are 54% for the Wavelength panel and 42% for the public survey. 60% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the proposed mix of uses on this site.
- 2.13 47% of sample survey respondents are satisfied with the mix of uses proposed for the Hothampton site, the corresponding percentages are 46% for the Wavelength panel and 38% for the public survey. 54% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the proposed mix of uses on this site.
- 2.14 46% of sample survey respondents are satisfied with the scale of the proposed buildings; the corresponding percentages are 37% for the Wavelength panel and 34% for the public survey. 46% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the scale of the proposed buildings.
- 2.15 55% of sample survey respondents are satisfied with the amount of proposed public space; the corresponding percentages are 45% for the Wavelength panel and 40% for the public survey. 51% of Western Area panellists and 51% of Bognor Regis panellists are satisfied with the amount on proposed public space.
- 2.16 Three times as many sample survey respondents feel that the proposed developments will benefit the town as feel they will harm the town (63% to 21%). This ratio is even

⁸ 'Very satisfied and 'somewhat satisfied'

higher for the Wavelength survey, where five times as many respondents think it will benefit as think it will harm the town (65% to 13%). One and a half times as many public survey respondents think it will benefit as think it will harm the town (48% to 33%). 68% of Western Area panellists and 66% of Bognor Regis panellists are feel that the proposed developments would benefit the town. For both these groups, 28% feel that the proposals would greatly benefit the town. The margins are even greater when looking at respondents aged under 35.

3. KEY FINDINGS

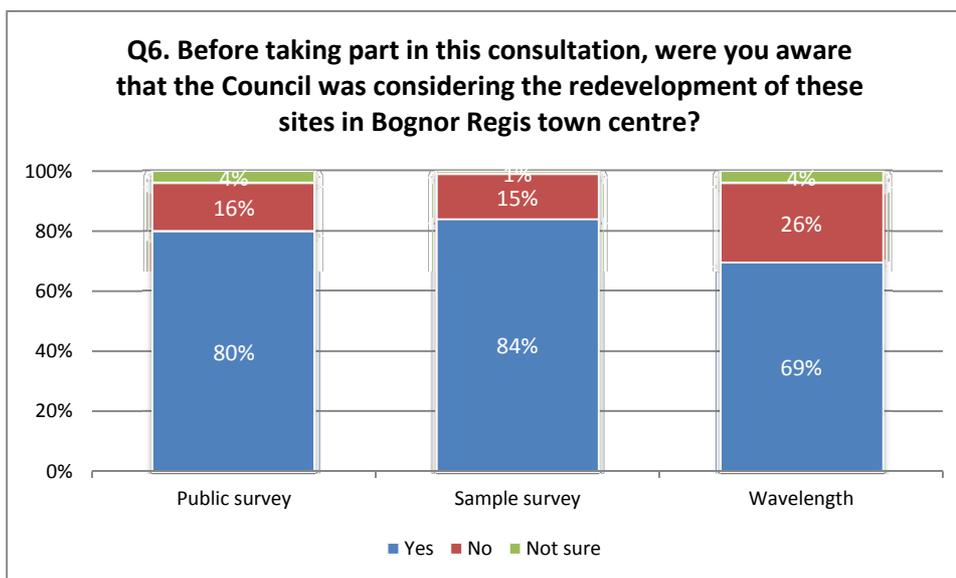
3.1 The discussion of the survey results follows the order used for the questionnaire⁹ and is broken down into the following sections:

- Respondent profile and awareness of developments
- Attitudes and preferences toward the Alexandra Theatre proposals
- Attitudes and preferences toward the Regis Centre Site proposals
- Attitudes and preferences toward the Hothamton Site proposals
- Overall attitudes toward the scheme

3.2 Respondent Profile

3.2.1 There is a high level of awareness by respondents to the public survey and respondents to the representative sample survey that the Council is considering the redevelopment of these sites. Awareness is lower amongst Wavelength respondents as the panel includes members from across the district (those living further from Bognor Regis are less likely to be aware of potential redevelopment of these sites). However, awareness is very high amongst Wavelength Western Area respondents (91%) and 90% of Wavelength panellists living in the four Bognor Regis wards¹⁰ (90%).

Figure 1 – awareness prior to consultation that the Council was considering the redevelopment of these sites



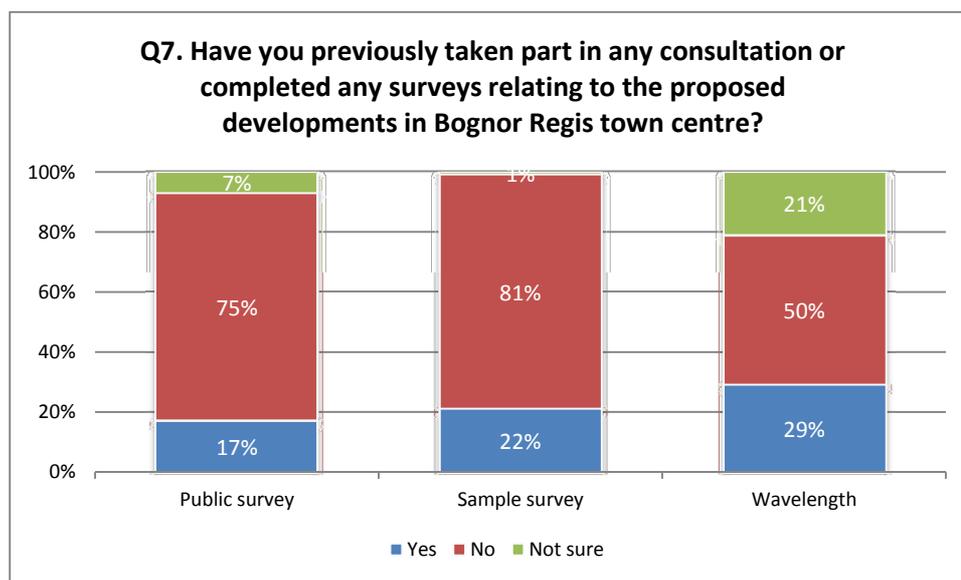
⁹ With the exception of certain respondent profiling questions, the same questionnaire was used for all three surveys

¹⁰ Hotham, Marine, Orchard, and Pevensy

3.2.2 Wavelength Panel members are more likely than other consultees to have taken part in previous consultation. This is to be expected as the panel participates in consultation on a wide range of subjects on a regular basis (for example, the panel has recently responded to a survey on Arun District Council’s Draft Leisure Strategy which included questions on Bognor Regis). Looking at the Wavelength results in more detail, 40% of Western Area respondents and 37% of panellists living in the four Bognor Regis wards have taken part in consultation relating to the proposed developments.

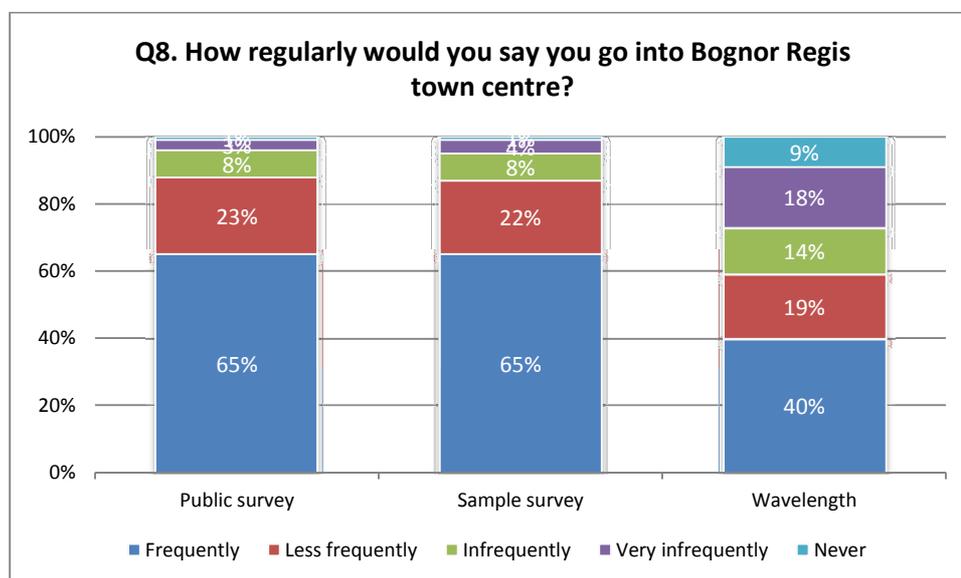
The percentage of Wavelength respondents who are ‘not sure’ is significantly higher than for the other two surveys. This is a theme throughout this report and reflects the fact that the panel includes members from right across the district (see 1.2.3 above).

Figure 2 – whether previously taken part in any consultation or completed any surveys relating to the proposed developments in Bognor Regis town centre



3.2.3 The regularity of visiting Bognor Regis town centre is very similar for the public survey and sample survey, with 65% visiting frequently. Overall, fewer Wavelength respondents visit Bognor Regis town centre frequently; however 75% of Western Area respondents and 85% of panellists living in the town’s four wards visit the town centre frequently.

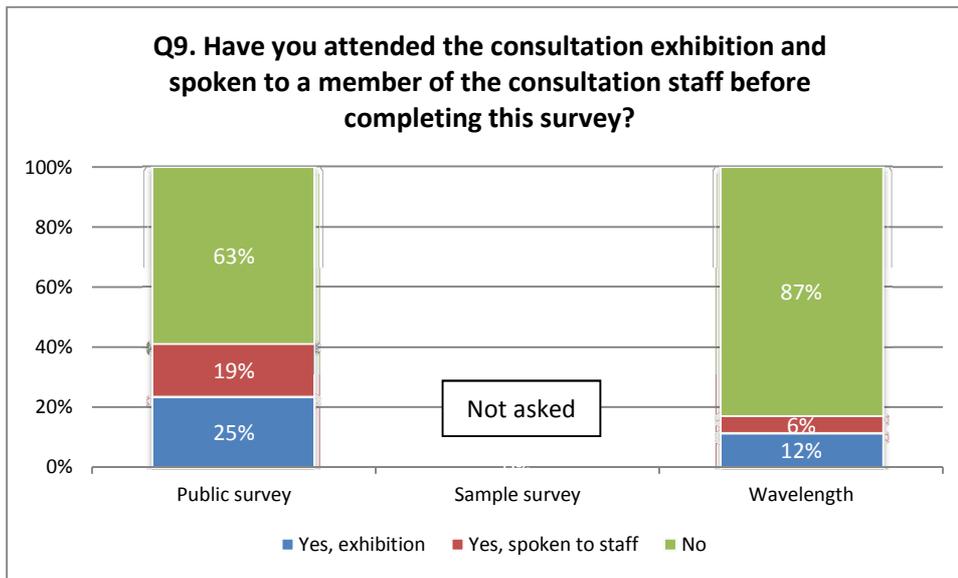
Figure 3 - how regularly Bognor Regis town centre visited



3.2.4 Overall, a small proportion of Wavelength respondents attended one of the exhibitions held on these proposals. However 20% of Western Area Wavelength respondents and 19% of Wavelength panellists living in the town’s four wards visited an exhibition. (A further 10% of Western Area panellists and 8% of town based panellists attended an exhibition and spoke to staff).

These Wavelength respondents will quite probably have responded to the public survey as well as the Wavelength survey. As the survey results have been kept separate there is no bias from double counting individual views.

Figure 4 – whether attended a consultation exhibition and spoken to a member of consultation staff before completing this survey

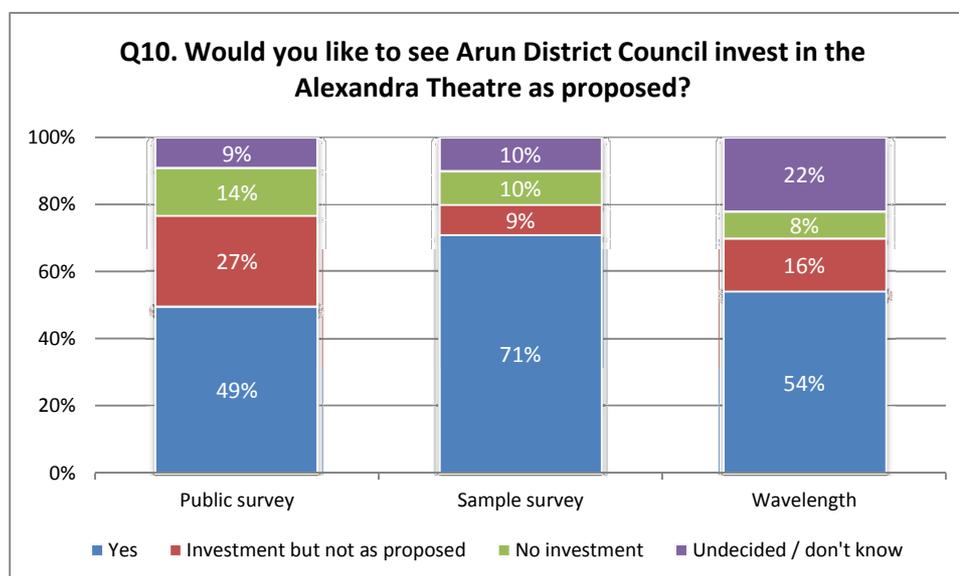


3.3 Attitudes and preferences toward the Alexandra Theatre proposals

3.3.1 Proposals for the Alexandra Theatre include: raising the seating capacity to 430-450 seats; improvements to the technical facilities; a new foyer and atrium; an indoor arcade / winter garden including small retail units; gallery space, bar, and café; rehearsal studios.

3.3.2 The results of the representative sample survey show far more support for the proposed investment in the Alexandra Theatre (71% compared with 54% for wavelength and 49% for the public survey). The percentages saying ‘no’ to investment are broadly similar for all three surveys (10%, 8%, and 14%). Public survey respondents are more likely than others to want investment but not as proposed (27%, compared with 9% and 16%). Looking in detail at Wavelength responses: 59% of Western Area respondents support the proposed investment, whilst 25% support investment but not as proposed. The corresponding results for Wavelength panellists living in the four Bognor Regis wards are 54% and 24%.

Figure 5 – views on investment in the Alexandra Theatre

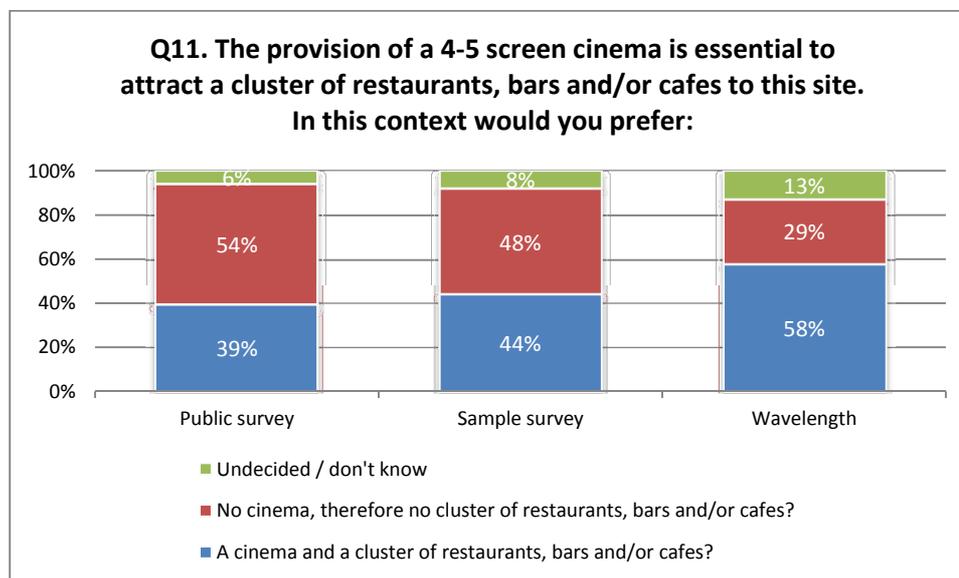


3.4 Attitudes and preferences toward the Regis Centre Site proposals

- 3.4.1 The next section asked respondents for their views on the Regis Centre site proposals. The current proposals include a new 80 bedroom hotel, restaurants/cafes arranged around a new public square facing the seafront, ‘anchored’ by a modern 4-5 screen cinema.
- 3.4.2 There are interesting differences in views regarding the provision of a cinema on the Regis Centre site. The greatest difference is seen between respondents to the public survey and Wavelength respondents. Whilst Wavelength respondents who expressed an opinion are two to one in favour of a cinema (58% to 29%), public survey respondents are more likely to oppose than support a cinema, with 54% opposing a cinema against 39% in favour of one. It should be noted that a majority (53%) of public survey respondents aged under 35 support a cinema on this site. Sample survey respondents’ views fall between those of the other two surveys, with 44% in support and 48% opposed.

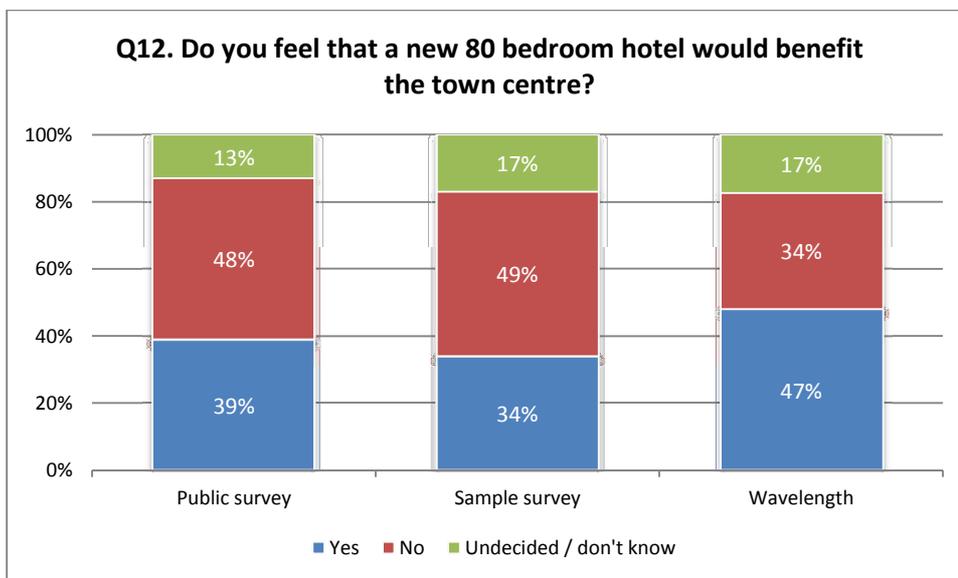
The higher percentage of Wavelength panellists in support of a cinema is reflected in the detailed analysis, with 55% of Western Area panellists supporting a cinema and 56% of panellists living in the four Bognor Regis wards. Interestingly 67% of Eastern Area panellists support the cinema proposal. Further investigation is needed into why this figure is so high; it may be linked to the impending closure for films of Littlehampton’s Windmill Theatre, meaning the closest cinema will be Bognor’s Picturedrome, or having to travel further afield to Worthing or Chichester.

Figure 6 – views on the provision of a cinema on the Regis Centre site



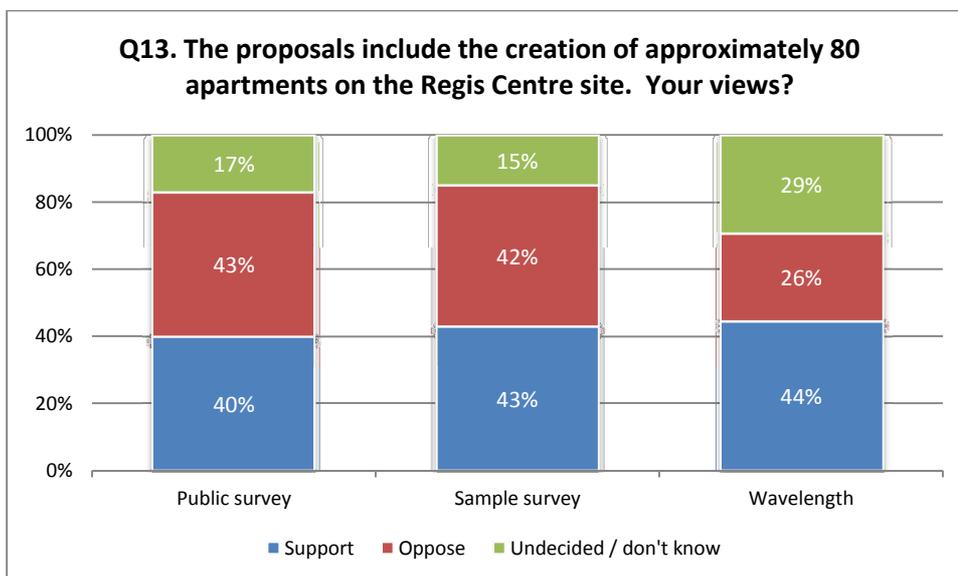
3.4.3 Wavelength Panel members are more likely than the other two groups of consultees to feel that a new 80 bedroom hotel on the Regis Centre site will benefit the town centre. A majority of Wavelength Western Area and Bognor Regis town respondents feel a new hotel would benefit the town (55% and 56% respectively). In contrast, around half of sample survey and public survey respondents feel that the proposed hotel would not be of benefit. Officers’ anecdotal experience during the public consultation was that the hotel was not an issue of concern for the vast majority of people.

Figure 7 - views on a new hotel on the Regis Centre site



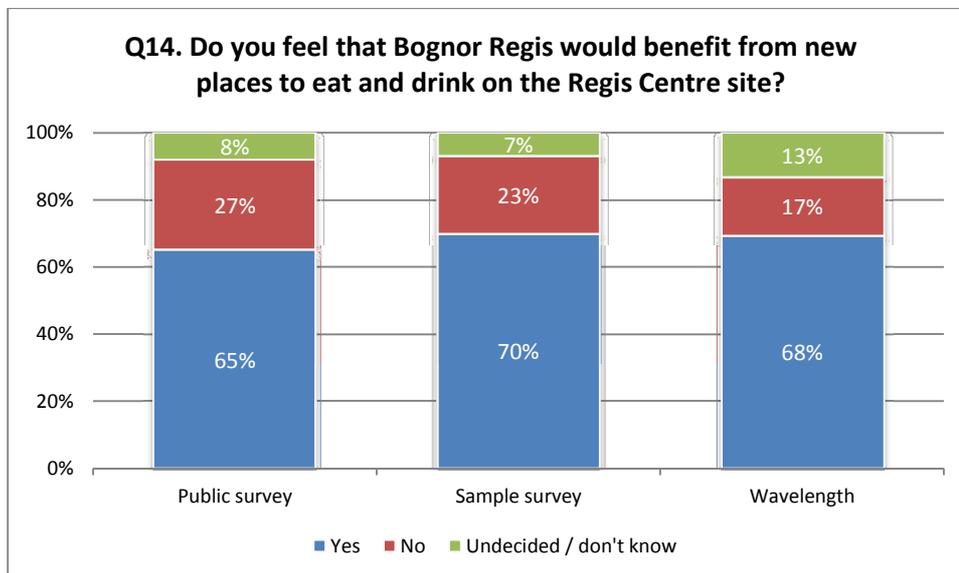
3.4.4 The proposal to include approximately 80 apartments on the Regis Centre site drew very similar responses from the public survey and the sample survey. Despite being advised that the apartments will help fund other developments such as improvements to the Alexandra Theatre, responses are broadly evenly split between support and opposition, with around one in six undecided. Although a similar percentage of Wavelength respondents support the proposal, around three in ten are undecided. 49% of Western Area panellists support the proposal, as do 45% of Bognor Regis town based panellists.

Figure 8 - views on proposed apartments on the Regis Centre site



3.4.5 There is strong support across the three consultation groups for new places to eat and drink on the Regis Centre site with around two in three respondents in favour for each group. The ‘yes’ figure is slightly higher for Wavelength’s Western Area and Bognor Regis town respondents (72% and 78% respectively).

Figure 9 – views on whether the town would benefit from new places to eat and drink on the Regis Centre site

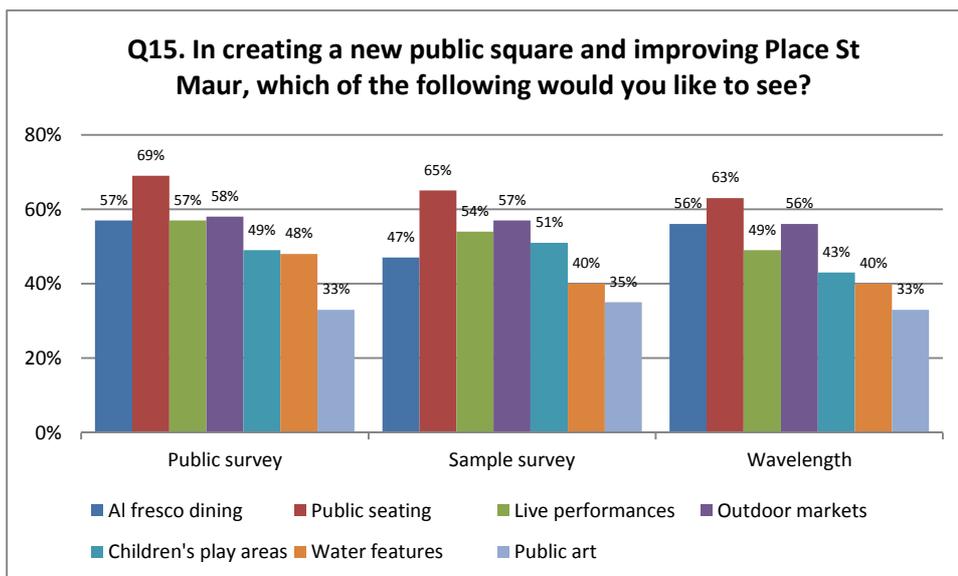


3.4.6 Asked to select from a list of options for improvements to Place St Maur, preferences are broadly similar for all three groups, with public seating and outdoor markets mentioned by the majority of respondents in all three surveys. Whilst only 49% of Wavelength respondents mention live performances, 62% of Western Area panellists and 60% of town panellists say that they would like this feature.

Al fresco dining is less popular with sample survey respondents (47%) than with the public survey (57%) and Wavelength (56%). Only 45% of Wavelength Panellists living in Bognor Regis town mention al fresco dining.

60% of Wavelength panel members living in Bognor Regis town say that they would like to see water features.

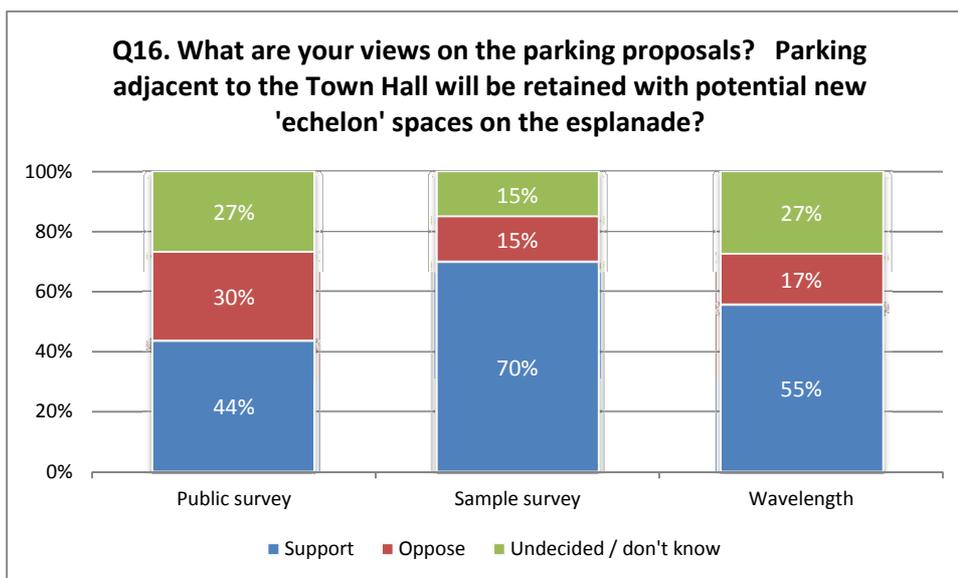
Figure 10 – preferences for improvements to Place St Maur



3.4.7 The next question asked for views on the parking proposals for the Regis Centre site. This saw a wide divergence of opinion between the three consultation groups. Whilst a minority of public survey consultees supported the proposals, more than two out of three sample survey respondents gave their support. The Wavelength Panel views are broadly in between those of the other groups. 63% of Western Area panellists support the proposal, as do 63% of Bognor Regis panellists.

It must be noted that this question did not address the quantity of car parking available in the town centre in general, and focused specifically on the parking proposals relating to the Regis Centre site. Feedback, particularly from the public survey, has indicated that adequate car parking is of particular concern to town centre visitors and residents.

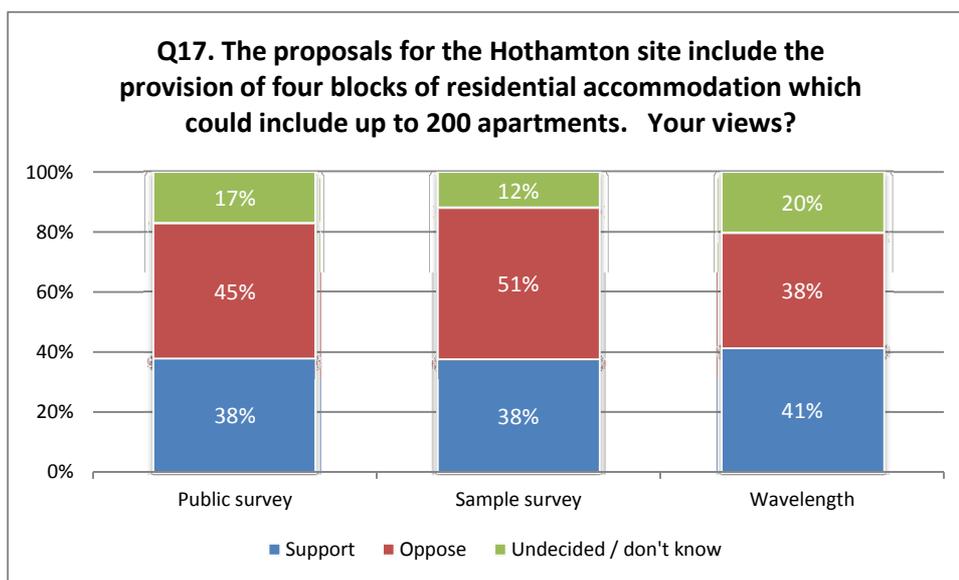
Figure 11 – views on parking proposals (Regis Centre site)



3.5 Attitudes and preferences toward the Hothamton Site proposals

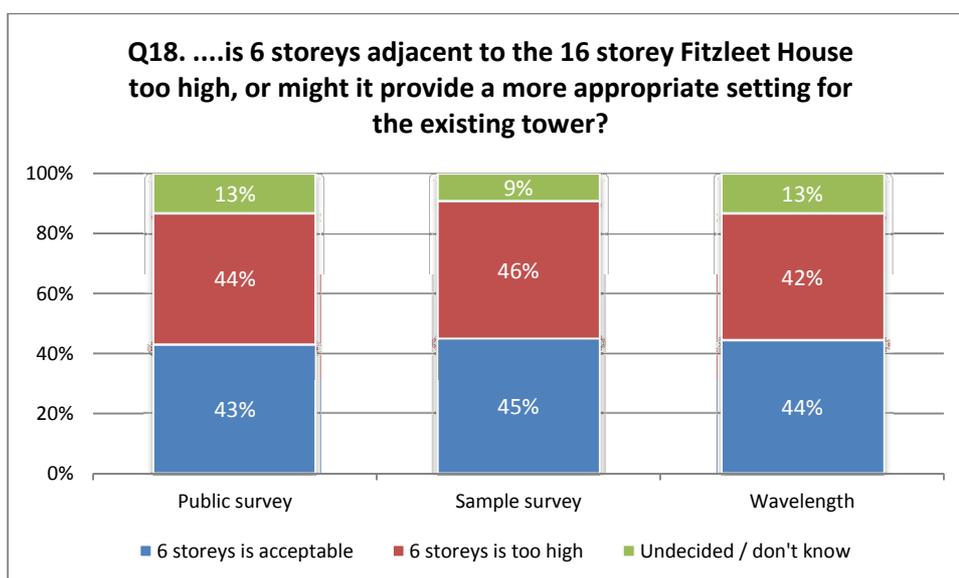
3.5.1 The Hothamton site proposals comprise a series of four blocks of residential accommodation which could include up to 200 apartments, rising from 3 to 6 storeys. The buildings may incorporate shops or other commercial / leisure uses at street level. Provision would be made for public and residents’ parking at ground level alongside landscaped areas. Despite being advised that the apartments will help fund other developments such as improvements to the Alexandra Theatre, only around two in five support the proposal. This proportion is similar for all three consultation groups. Looking in more detail at Wavelength Panel results, 47% of Western Area panellists and 48% of Bognor Regis panellists support the proposal. A slight majority of sample survey respondents are opposed to this proposal.

Figure 12 – views on proposed residential accommodation on the Hothamton site



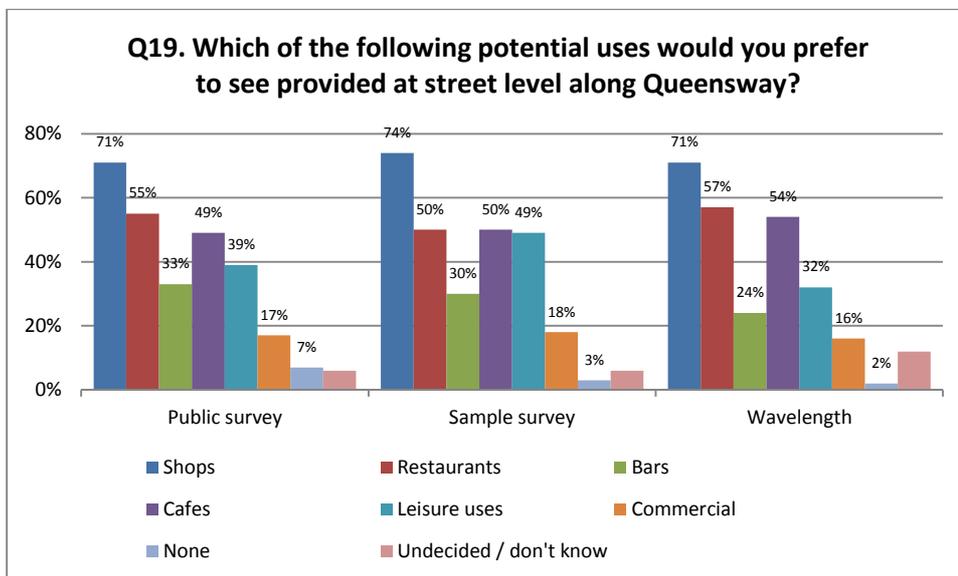
3.5.2 All three consultations show similar results on the height of the proposed accommodation. 50% of Western Area panellists and 56% of Bognor Regis panellists view 6 stories as acceptable.

Figure 13 – views on the height of proposed accommodation



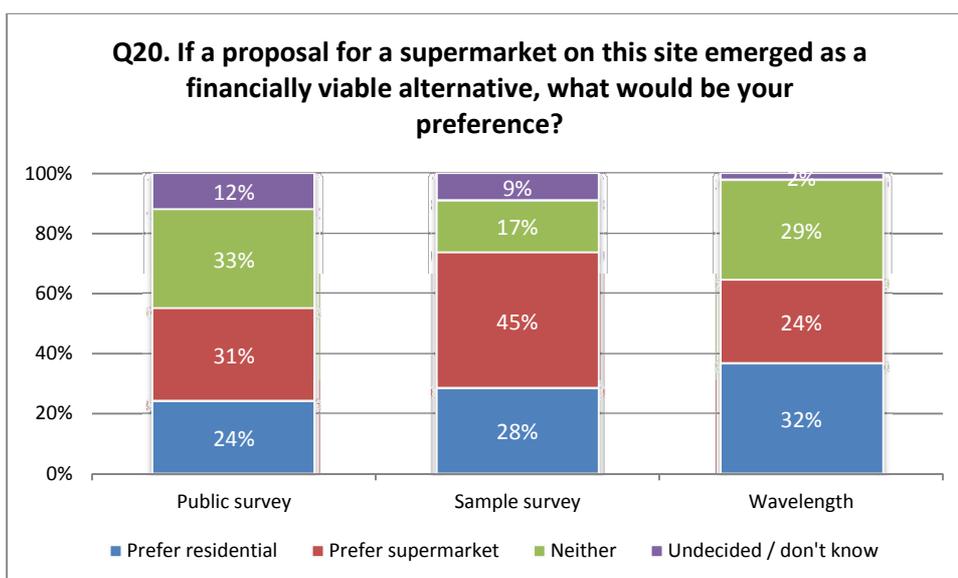
3.5.3 Asked to select from a list of potential uses at street level along Queensway, preferences are broadly similar for all three groups, with shops and restaurants mentioned by the majority of respondents for all three consultations. Cafes were also selected by around half of each group. Shops and restaurants are popular with the majority of Western Area panellists (78% mentioning shops and 68% mentioning restaurants) and Bognor Regis town panellists (87% mentioning shops and 66% mentioning restaurants).

Figure 14 – preferences for uses at street level along Queensway



3.5.4 For the public survey and sample survey, those preferring a supermarket on this site outweigh those preferring to see residential. In contrast, more of the Wavelength Panel opt for residential over a supermarket. The percentage split for Western Area panellists is 35% in favour of residential and 30% in favour of a supermarket; however the percentages for Bognor Regis town panellists are 29% in favour of residential and 35% in favour of a supermarket; in line with the results of the other surveys.

Figure 15 – preferences for residential or supermarket on Hothampton



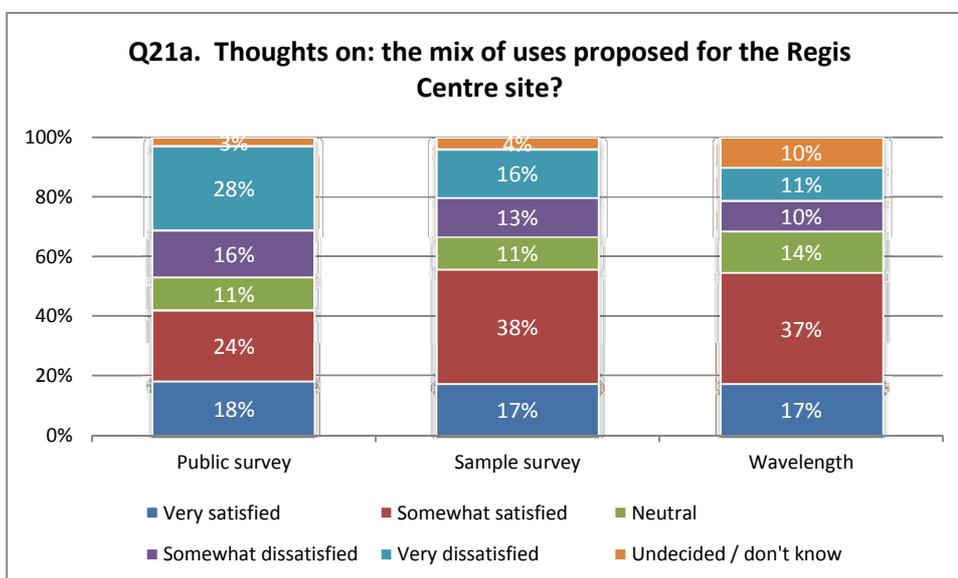
3.6 Overall attitudes toward the scheme

3.6.1 The final section of this report looks at respondents’ responses to a series of attitudinal questions designed to measure views on the proposals as a whole. Respondents were asked to indicate their level of satisfaction with a number of elements of the proposed developments.

3.6.2 55% of sample survey respondents are satisfied¹¹ with the mix of uses proposed for the Regis Centre site, the corresponding percentages are 54% for the Wavelength panel and 42% for the public survey. Whilst 2.5 times as many Wavelength respondents and twice as many sample survey respondents are satisfied than dissatisfied, the public survey results show marginally more respondents dissatisfied than satisfied (44% to 42%).

60% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the proposed mix of uses on this site.

Figure 16 - thoughts on the mix of uses proposed for the Regis Centre site

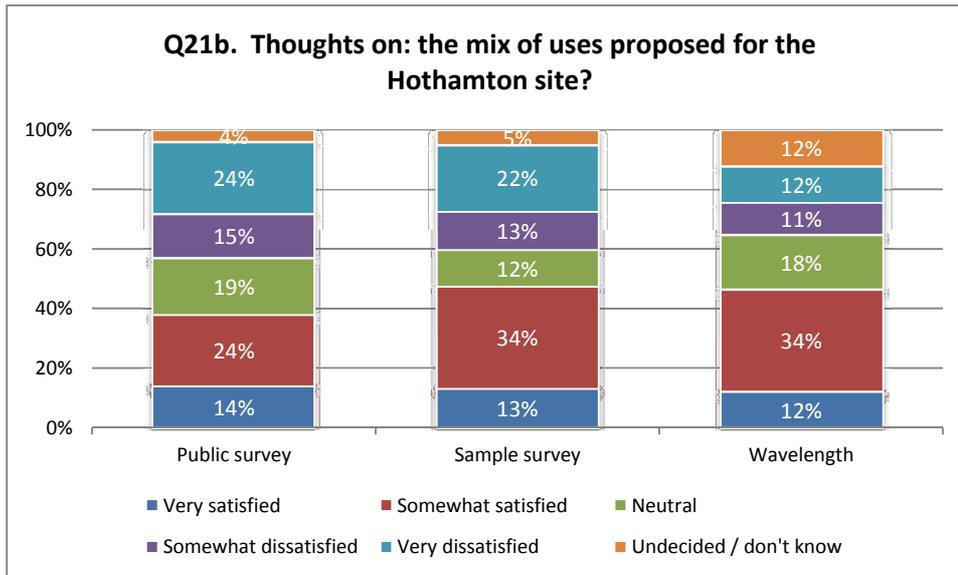


3.6.3 47% of sample survey respondents are satisfied with the mix of uses proposed for the Hothampton site, the corresponding percentages are 46% for the Wavelength panel and 38% for the public survey. Whilst twice as many Wavelength respondents and 1.3 times as many sample survey respondents are satisfied than dissatisfied, the public survey results show almost equal percentages dissatisfied and satisfied (38% to 39%).

54% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the proposed mix of uses on this site.

¹¹ ‘Very satisfied and ‘somewhat satisfied’

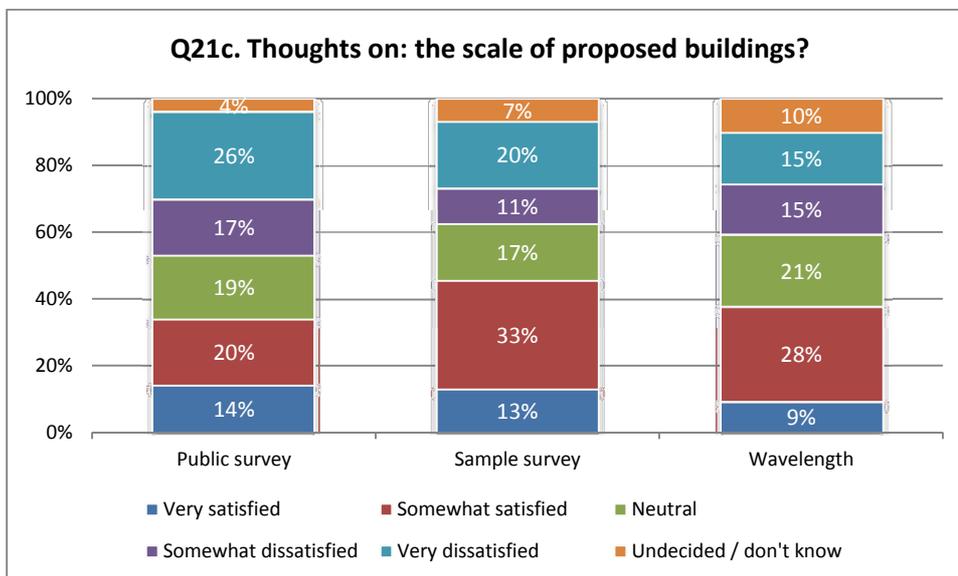
Figure 17 - thoughts on the mix of uses proposed for the Hothamton site



3.6.4 46% of sample survey respondents are satisfied with the scale of the proposed buildings; the corresponding percentages are 37% for the Wavelength panel and 34% for the public survey. Whilst 1.2 times as many Wavelength respondents and 1.5 times as many sample survey respondents are satisfied than dissatisfied, the public survey results show 1.3 times more respondents dissatisfied than satisfied (43% to 34%).

46% of Western Area panellists and 53% of Bognor Regis panellists are satisfied with the scale of the proposed buildings.

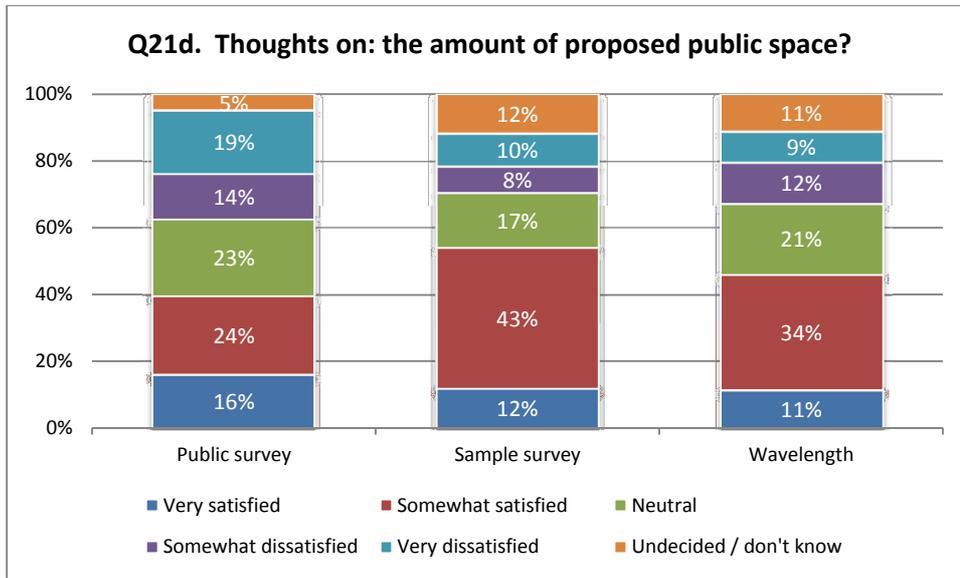
Figure 18 - thoughts on the scale of proposed buildings



3.6.5 55% of sample survey respondents are satisfied with the amount of proposed public space; the corresponding percentages are 45% for the Wavelength panel and 40% for the public survey. Whilst more than twice as many Wavelength respondents and more than three times as many sample survey respondents are satisfied than dissatisfied, the public survey results show 1.2 times more respondents dissatisfied than satisfied (43% to 34%).

51% of Western Area panellists and 51% of Bognor Regis panellists are satisfied with the amount on proposed public space.

Figure 19 – thoughts on the amount of proposed public space



3.6. Three times as many sample survey respondents feel that the proposed developments will benefit the town as feel they will harm the town (63% to 21%). This ratio is even higher for the Wavelength survey, where five times as many respondents think it will benefit as think it will harm the town (65% to 13%). One and a half times as many public survey respondents think it will benefit as think it will harm the town (48% to 33%).

68% of Western Area panellists and 66% of Bognor Regis panellists feel that the proposed developments would benefit the town. For both these groups, 28% feel that the proposals would greatly benefit the town.

Figure 20 – overall views on how the proposed developments might affect the town

