Carter Jonas

Town Centre and Retail Study 2016

STAGE 1: BASELINE REPORT

Prepared on behalf of:

Wealden District Council

DECEMBER 2016

Carter Jonas

QA

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Date:	Originators:	Approved:
December 2016		
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1 INTRODUCTION & SCOPE OF STUDY

1.1 Carter Jonas (CJ) and Regeneris were jointly instructed by the Wealden District Council ('the Council') in 2016 to prepare the *Wealden Retail and Economic Study 2016* (WERS 2016). The scope of work required by the Council has been divided into the following three inter-related stages:

- Stage 1: Baseline Retail, Town Centre and Economic Assessment
- Stage 2: Need and Demand Assessment
- Stage 3: Options and Recommendations Report

1.2 Further work has also been undertaken to demonstrate how the study has been carried out in compliance with the NPPF's 'Duty to Co-operate'.

1.3 This Stage 1 Report updates the retail and town centre evidence base[1] for the District's main centres; namely Uckfield, Hailsham, Crowborough, Heathfield, Polegate, Forest Row and Wadhurst. The findings of the assessment will be used to inform the preparation of the provisions and policies of the emerging Wealden Local Plan pertaining to retail and town centre uses, as well as the Hailsham Area Action Plan (AAP)[2].

1.4 By way of background to this study Wealden is a large rural district characterised by a dispersed settlement pattern. The District's main centres generally serve the shopping, service and employments needs of their local resident populations, as well as tourists and visitors to the area. However, the District's Town Centres have not grown to be significant centres in the South East. This is mainly explained by their proximity to a number of higher order shopping, service and employment centres on the edge of the District, principally Eastbourne to the south and Royal Tunbridge Wells to the north. The *High Weald Area of Outstanding Natural Beauty* (AONB) and the *South Downs National Park*, along with internationally important conservation areas at Ashdown Forest and the Pevensey Levels, have also restricted the location and scale of new development in the District.

1.5 Although Wealden is an attractive area to live, and is generally characterised as having an affluent population and low crime rates, there are inequalities across the District. For example there is a sharp contrast between high and low incomes, and there are strong geographical disparities, with higher average incomes in the north contrasting with lower incomes around Hailsham and Polegate in the south. The population is also ageing, meaning that the District is reliant upon in-migration, assisted by new housing, to sustain and grow its local economy and town centres. The fact that half of the District's population live outside the towns in more rural areas also creates particular challenges for access to shops and services in the main settlements.

1.6 The challenge for the Council therefore is to focus growth where it is most accessible and sustainable, whilst maintaining the balance between rural settlements and larger service centres. It is recognised that some settlements, while having limited opportunities to accommodate significant growth, could support some

[1] The District's 'Interim Shopping Study 2008: Volume 1' was published in October 2008.
[2] Please note that the economic study has been prepared by Regeneris in separate documents.

development to meet the needs of the community. However, in other settlements, in less sustainable locations, additional growth will simply encourage more travel and out commuting and the potential for increasing social inequality. Notwithstanding this, it is recognised that residents will still look to other centres outside of the District for employment, leisure, recreation and healthcare.

1.7 This study takes into account the local context and the emerging national and development plan policy guidance, as well as other key material considerations; principally the ***National Planning Policy Framework*** (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the ***Planning Practice Guidance*** (PPG), published in March 2014, which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres.

1.8 For ease of reference this *Working Draft Report* is structured as follows:

- **Section 2** reviews the national, regional (where relevant) and local planning policy context material to retail planning and town centres.
- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4** defines the Study Area and zones (see Appendix 1) which provide the framework for both the household telephone interview survey (HTIS) and economic capacity assessment (Stage 2 Report). The survey methodology and questionnaire are set out in Appendix 2 to this report, and the full (weighted) tabulations are reproduced in Appendix 3. The survey results have informed the market share analysis for convenience and comparison goods retailing in Appendix 4 and Appendix 5 respectively, which will also underpin the economic capacity assessment.
- **Section 5** provides a brief overview of the main higher order centres outside Wealden District; namely Royal Tunbridge Wells, Eastbourne, Lewes, Brighton, Haywards Heath and East Grinstead. These centres all influence shopping patterns and leisure preferences in the District, and it is therefore important to consider the role and function of the District's main centres in this context.
- **Section 6-12** set out the health check assessments for the District's main centre. These assessments draw on the survey evidence, recent research and our own audits of each centre carried out in compliance with the Planning Practice Guidance (PPG) and accepted methodologies (see Appendix 6 for a more detailed explanatory note). This assessment also draws on consultations with some of the key stakeholders, and 'guided' tours of Hailsham, Uckfield and Crowborough.

1.9 This report will inform the Stage 2 (*Need and Demand Assessment*) and Stage 3 (*Options and Recommendations*) Reports.

2 POLICY & STUDY CONTEXT

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other key material considerations.

National Planning Policy Framework (NPPF)

2.2 The NPPF was published in March 2012 and reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans[3] and Neighbourhood Plans[4]. At the heart of the NPPF is a presumption in favour of sustainable development[5], which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level.

2.3 For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *"…it is clear that development which is sustainable can be approved without delay"*.

2.4 The NPPF (paragraph 17) also sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

2.5 The Framework (paragraph 150) emphasises that Local Plans are *"…the key to delivering sustainable development that reflects the vision and aspirations of local communities*". They should be *"aspirational but realistic"* and should set out the opportunities for development and clear policies on *"…what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements plan positively for the development and infrastructure required in the area; be drawn up over an appropriate time

[3] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[4] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[5] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

scale (preferably 15 years; indicate broad locations for strategic development on a key diagram and land-use designations on a Proposals Map; allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.7 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action. The NPPF is clear that pursuing sustainable development requires *"…careful attention to viability and costs in plan-making and decision-taking"* (paragraph 173).

2.8 The Framework (paragraphs 18-149) sets out thirteen key principles for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. In terms of **'**ensuring the vitality of town centres**'** the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[6] environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should amongst other considerations:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas[7], based on a clear definition of primary and secondary frontages[8] in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail and leisure development needed in town centres;

[6] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[7] Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

[8] The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- ensure that the needs for retail and leisure are "*met in full*" and "*not compromised by limited site availability*". Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.9 When assessing and determining applications for main town centre uses[9] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a **sequential test**[10], which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, *"…preference should be given to accessible sites that are well connected to the town centre"* (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an **impact assessment** if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). The NPPF (paragraph 26) states that this should include assessment of 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; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, *"…the impact should also be assessed up to ten years from the time the application is made"*.

2.10 The NPPF (paragraph 27) states that *"…where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused"*.

Planning Practice Guidance (PPG)

2.11 This study also draws on advice set out in the *Planning Practice Guidance* (PPG), published in March 2014. The NPPG has streamlined and replaced the advice previously set out in *PPS4 Practice Guidance on Need, Impact and the Sequential Approach*. The revised NPPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the NPPG (para 003) states that the assessment of the potential for

[9] NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

[10] This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

centres to accommodate new development and different types of development should cover a "*three-five year period*" but should "*also take the lifetime of the Local Plan into account and be regularly reviewed*".

Local Planning Policy Context

2.12 The relevant up-to-date Development Plan Documents (DPDs) for Wealden District comprise the 'saved' polices of the *Wealden Local Plan* (WLP, adopted 1998) and the *Core Strategy* (adopted February 2013). However, given that it is now some 18 years since the WLP was adopted, our review of relevant DPDs necessarily focusses on the policies and provisions of the adopted Core Strategy.

2.13 As described in Section 1, the Council has started work on the new *Wealden Local Plan*. Once adopted it will supersede the Core Strategy and Saved Policies of the 1998 Wealden Local Plan. As the first stage of preparation of the Plan the Council published the *Issues, Options and Recommendations* (IOR) document in October 2015 for consultation. The IOR document provides an indication of the Council's "direction of travel" in terms of its emerging policies to deal with issues such as housing, the economy, the environment and infrastructure. As explained in Section 1, this *2016 Retail and Town Centre Study* has been commissioned by the Council to help inform and shape the policies and provisions of the emerging Local Plan, and the emerging *Hailsham Area Action Plan* (AAP). We therefore review and refer to some of the key issues and policies identified by the emerging Plan in this section and throughout our report.

Wealden Core Strategy (February 2013)

2.14 The Core Strategy is the overarching planning policy document for the Wealden District Area and sets out the Council's vision for future development over the period to 2027. The Council's vision is to accommodate growth to meet future needs, whilst protecting and enhancing the District's essential rural character and high quality environment.

2.15 The Council's Spatial Strategy is set out in Section 3 of the Core Strategy and addresses social, economic and environmental issues unique to Wealden, as well as local aspirations. As described in Section 1, a critical part of the Council's Core Strategy is to ensure that the future allocation of development and growth in the District is based upon the attributes and constraints of settlements. Against this background, the Core Strategy identifies the role of individual towns and villages in Wealden and the key elements of the Settlement Hierarchy that underpin the Spatial Strategy are summarised in the table below.

Table 2.1 Core Strategy –Settlement Hierarchy

DESIGNATION:	FUNCTION	TOWNS/VILLAGES/HAMLETS
PRIMARY CENTRE	A large accessible settlement by different modes with a centre containing a large range of shops, including the sale of high order goods, a range of leisure opportunities and facilities including a hospital with Accident and Emergency services. Settlement meets all its own needs.	Tunbridge Wells/ Tonbridge and Eastbourne (All outside of the District boundaries)
SECONDARY CENTRE	An accessible settlement by different modes, containing a range of shops, including high street chains, And facilities including a hospital. Settlement meets the majority of its own needs.	East Grinstead, Lewes and Haywards Heath (All outside of the District boundaries)
DISTRICT CENTRE	An accessible settlement by different modes containing a range of shops, employment opportunities and facilities including secondary school. Not reliant upon other centres within the District to meet day to day needs, but do require support from other secondary/primary centres to meet residents' needs.	Crowborough Uckfield Hailsham

SERVICE CENTRE	Sustainable locations with a range of jobs, services and facilities, serving predominantly nearby communities and the wider rural area but with accessibility to larger centres.	Heathfield, Polegate and Willingdon, Stone Cross, Wadhurst and Forest Row
LOCAL SERVICE CENTRE	Settlements that have a more limited supply of social and economic infrastructure including Employment and where local residents depend upon other centres to meet a broad range of needs with some form of accessibility to those centres.	Mayfield, Frant, Buxted, Herstmonceux, Ninfield, Pevensey Bay, Horam, Alfriston, Groombridge, Hartfield, Westham, and Rotherfield
NEIGHBOURHOOD CENTRE	A settlement with limited, basic or no facilities but with access to another centre, or a settlement with facilities but poor accessibility or access only to a service or local centre	Including: Pevensey, Maresfield, Danehill, Five Ash Down, Nutley, High Hurstwood, Upper Dicker, Lower Horsebridge, Hellingly, Rushlake Green, Mark Cross, Cross-in-Hand, etc.
OTHER UNCLASSIFIED SETTLEMENTS	This category covers a wide range of settlements with few or no facilities and services, and where further development would be unsustainable.	All other settlements in Wealden

Source: see Core Strategy (Table 1, pages 9/10)

2.16 In terms of the Council's Spatial Planning Objectives the relevant policies SPO1-SPO15 are set out in Section 4 of Core Strategy. The most relevant to this study include:

- **SPO3** - identifies the need for 9,440 homes within Wealden from 2006 to 2027 (equivalent to 450 dwellings per annum).
- **SPO4** – sets out the Council's objective to ensure the long term viability of the District's five principal towns by supporting a range of improvements compatible with the local retail and service functions. This includes more substantial investment in Uckfield and Hailsham,
- **SPO6** – sets out the Council's intention to provide for an additional 40,000 sqm net of employment floorspace, in addition to existing commitments, and 17,000 sqm net of retail floorspace to help support the growth of the local economy and decrease net out migration of 15-24 year olds.
- **SPO14** – set out the aim to maximise the use of previously developed land for new development wherever possible.

2.17 Section 5 of the Core Strategy comprises the **Spatial Strategy Policies** for the District and identifies what will be delivered at a strategic level, and provides a clear direction on the provision of new homes, employment and retail from 2006 to 2027.

2.18 In terms of the provision of 9,440 new homes by 2027, **Policy WCS1** states that the Core Strategy and subsequent DPDs will allocate land for the provision of at least 4,525 net additional dwellings in the District between 2010 and 2027, after allowing known commitments[11]. **Policy WCS2** sets out the broad distribution of land allocated to meet the housing provision identified in Policy WCS1. Development will predominantly be focussed in and around the main towns/settlements of Hailsham/Hellingly (2,945 new homes to be provided by 2027), Uckfield (1,742 new homes), Polegate and Willingdon (1,265 new homes), Crowborough (932 new homes) and Stone Cross and Westham (692 new homes). Although WCS2 makes no allowance for windfall sites, the Core Strategy does state that completions on these sorts of sites will count towards the District's overall house building totals, but the Council will need to ensure that the unplanned development does not conflict with the strategy. The overall delivery of housing is also subject to the provisions of **WCS5**

[11] Includes extant planning consents as of 1st April 2010, Non Statutory Local Plan allocations assessed as deliverable or developable and planning consent granted on land east of Battle Road WD/2009/2705

which deals with the release of land; the delivery of infrastructure in accordance with **WCS7**; and the Council's affordable housing requirements set out in **WCS8**.

2.19 Policy **WCS3** identifies that the forecast need for 17,000 sqm net of new Class A1 retail (convenience and comparison) floorspace and 40,000 sqm net of new Class B1/B2/B8 employment floorspace will be distributed across the following centres/settlements over the plan period:

- **Uckfield** - 10,707 sqm net of new retail and 12,650 sqm net of new employment floorspace.
- **Hailsham and Hellingly** - 6,230 sqm net of new retail and 8,650 sqm net of new employment floorspace.
- **Polegate and Willingdon/Stone Cross** - 16,890 sqm of new employment floorspace.

2.20 Policy **WS4** sets out the **Strategic Development Areas** that are considered critical to the delivery of the overall Spatial Strategy and to meet the identified needs for new retail, housing and employment uses. These include land identified at West Uckfield (SD1), East Hailsham (SD2), North Hailsham (SD3) and South Polegate/East Willingdon (SD4). Together these four sites will accommodate circa 3,000 new homes and 30,000 sqm net of new employment floorspace. Some 300 sqm of retail floorspace and education provision is also identified for the land at North Hailsham (SD3). The implementation and delivery of these sites is subject to the provision of new infrastructure and other investment.

2.21 Turning to the **Local Implications of the Strategy**, Section 6 of the Core Strategy focusses on the development of the District's main Town Centres. The key provisions are summarised in the table below. The more detailed site allocation proposals for each town, infrastructure requirements and delivery mechanisms will be set out in the Site Allocation DPDs.

Table 2.2 Town Centres – Strategy for Development

SETTLEMENT	STRATEGY FOR DEVELOPMENT OF TOWN CENTRES
Uckfield Area Strategy	The Core Strategy proposes a substantial expansion to Uckfield (see Figure 6 of Core Strategy). The aim is to improve the vitality and attractiveness of the town centre, widening the choice and variety of jobs, services and facilities will help reduce the need for longer distance travel. There is a commitment to a pro-active approach to town centre development and change, and "to provide the support needed to plan, manage and promote the town in a positive way" (see para 6.10). To meet the identified need for 10,707 sq m net of new retail floorspace the Core Strategy supports "sensitive redevelopment and expansion of the town centre … as part of a comprehensive scheme of improvements … and help create a vibrant and inclusive town centre" (para 6.11)
Hailsham and Hellingly Area Strategy	Hailsham is a traditional market town and has experience significant growth since the 1970s. A substantial expansion to Hailsham is identified by the Core Strategy to accommodate some 1,300 new dwellings and 5,930 sqm of new retail floorspace (see Figure 7). The aim is to improve the vitality and attractiveness of the town centre, and to widen the choice and variety of jobs, services and facilities, thereby reducing the need for longer distance travel. There is a commitment to a proactive approach to town centre development and change, and "to provide the support needed to plan, manage and promote the town in a positive way" (see para 6.18). There is also support for a comprehensive redevelopment scheme in the Town Centre, that includes a mixed use hub for retail, commercial, leisure, civic and residential activities (para 6.19). Additionally provision is made for 300 sqm of retailing within an extension to the urban area north of Hailsham in Hellingly (WCS4, Site SD4).
Polegate and Willingdon and Stone Cross Area Strategy	The Core Strategy (see Figure 8) seeks to provide some 700 new dwellings for this area and encourages development which supports the improvements to the range and quality of services and facilities available to its local community, the town centre environment and choice of shops (para 6.31)
Crowborough Area Strategy	The High Weald AONB encircles the town and Ashdown Forest is an area of international importance for wildlife habitat – together they restrict opportunities for significant growth of the Town Centre. In this context the Core Strategy (see Figure 9) identifies the need for 300 additional homes in Crowborough. It also supports an increase or improvement in the centre's retail floorspace offer to increase its retail attractiveness and to help consolidate the primary retail core of the town (para 6.38). It also seeks to establish farmers' market as a central feature of the town's offer (para 6.38), and improve linkages between the primary

	shopping core and other areas of the town, including public transport (para 6.38)
Heathfield Area Strategy	Heathfield is also surrounded by the High Weald AONB and topographical/landscape constraints restrict the opportunities for new development. Against this background the Core Strategy (see Figure 10) identifies to enhance the centre's recreational facilities by supporting the development of a swimming pool in an appropriate and sustainable location (para 6.41); and an increase or improvements in the centre's retail floorspace.
Rural Areas Strategy	The rural areas outside of the main urban areas cover almost 93% of Wealden District, and contain around 50% of its population. Much of this forms part of the High Weald AONB or South Downs National Park. The aim is to retain the role of the smaller Service Centres, Local Service Centres and Neighbourhood Centres in the centre hierarchy. Appropriate development will be encouraged which protects, supports and increases the range and quality of facilities and services available to the rural areas and which helps sustain rural living, reinforces the accessibility of settlements, whilst meeting needs and community aspirations. (para 6.43) Development will be restricted primarily to that required to meet an essential rural need, support rural diversification and sustainability of the countryside, promote tourism or enhance the countryside. (para 6.44). Policy WCS6 sets out the provision for at least 455 new dwellings across the smaller centres, with the main allocation identified for Horam (100). Wadhurst (70 homes) and Herstmonceux (70).

2.22 Finally Policy WCS14 states that the Council will take a positive approach when considering development proposals that reflects the presumption in favour of sustainable development contained in the NPPF.

Wealden Local Plan - Issues, Options and Recommendations (October 2015)

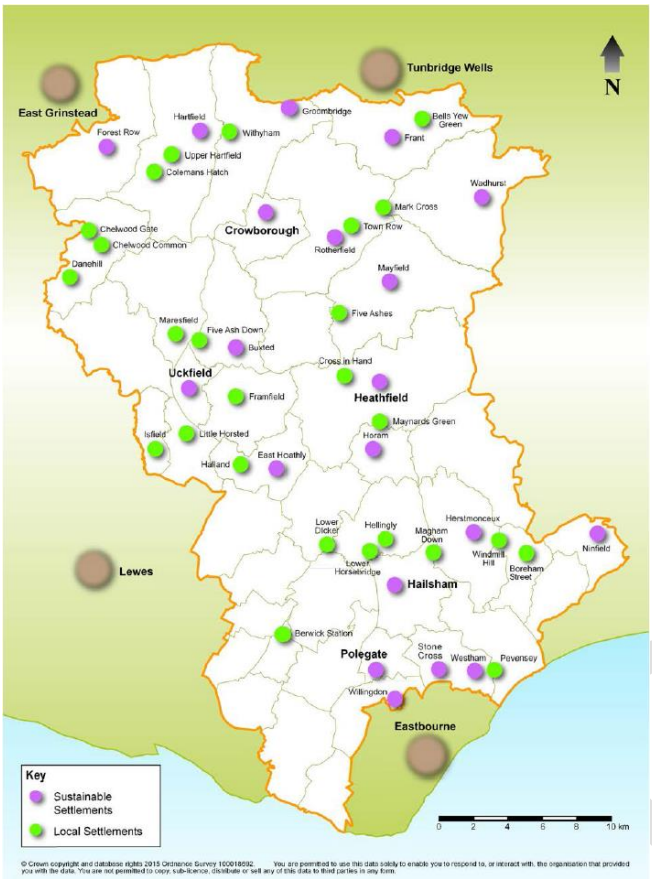
2.23 The Wealden Local Plan *'Issues, Options and Recommendations'* (WLP IOR) document was issued for consultation in October 2015 to progress the preparation of the new Local Plan and an additional Local Plan called the *Hailsham Area Action Plan* (Hailsham AAP). There are currently also five *Neighbourhood Development Plans* being produced in Wealden District, although none have been submitted for examination to date.

2.24 The need for a new Local Plan arose from the Examination in Public (EiP) of the Core Strategy, where the Inspector considered that the housing figures did not necessarily meet the identified need. Following review of the responses to the WLP IOR the Council will publish the '*Proposed Submissions Local Plan'* (PSLP) to be submitted to the Planning Inspector for examination, following a second round of consultation on whether the Plan is sound and meets all legal requirements.

2.25 Although the WLP IOR is at an early stage in its preparation and carries limited, if any weight as a policy document, it nevertheless provides an important context for the preparation of this *Retail and Town Centre Study Update* (RTCS 2016). In turn, the RTCS 2016 has been commissioned by the Council to provide the necessary robust evidence base to help inform the preparation of the emerging Local Plan.

2.26 As part of the review of the Local Plan, a revised Settlement Hierarchy is proposed based on sustainability characteristics. The figure below is reproduced from the WLP IOR (Figure 2) and shows the Sustainable and Local Settlements that are at the top of the hierarchy. The *'Sustainable Settlements'* are defined as being either very accessible with good local facilities, or accessible with good local facilities. The *'Local Settlements*' are defined as being accessible with local to very limited facilities. Below these in the hierarchy are the Neighbourhood and Residential Settlements, where public transport is "unreliable" or is not provided, and there is limited no facilities available to the local populations.

Figure 2.1 WLP IOR – Revised Settlement Hierarchy



2.27 Section 16 of the WLP IOR deals with the issues, options and recommendations pertaining to the District's main Towns and Village Centres. In compliance with the NPPF the Council has defined a network and hierarchy of centres based on their number of retail and non-retail units, diversity of uses and accessibility. The preferred Town and Village Centre Hierarchy is summarised in the table below.

Table 2.3 Town and Village Centre Hierarchy

CATEGORISATION	DRAFT DESCRIPTION	CENTRE
MARKET TOWN CENTRE:	A Primary Centre with more than 90 units serving a wider area with a good range of convenience and comparison retail provision, banking and post office facilities, leisure (including restaurants), community facilities, and employment opportunities and are accessible by public transport from surrounding areas	Uckfield Crowbrough Hailsham Heathfield
PRIMARY DISTRICT CENTRE	A centre comprising between 40 and 90 units and providing a good range of similar facilities to a market town centre- but in more limited numbers.	Polegate Wadhurst and Forest Row
SECONDARY CENTRE:	A centre within smaller settlements, or within neighbourhood areas of market towns, comprising of between 10 – 40 units, providing a range of local retail and service facilities and community and leisure facilities	For example: Pevensey Bay, Mayfield, Horam, Herstmonceux, Westham, Rotherfield
LOCAL SERVICE CENTRE:	A centre of less than 10 units, that provides a basic range of retail and limited additional facilities.	For example: Ninfield, Frant, Stone Cross, Hartfield, Groombridge and Buxted

Source: see WLP OIR (Table 1, page 120)

2.28 The WLP IOR (Issue 14) also addresses the NPPF requirement and sets out different options for the definition of Town Centre Boundaries (Option 18), Primary and Secondary Frontages (Options 19 and 20) and Primary Shopping Areas (Option 21) to help support the provision of strong and vibrant town centres. These definitions and boundaries are illustrated on maps for Uckfield (Map 28), Hailsham (Map 29), Crowborough (Map 30), Heathfield (Map 31), Polegate (Map 32), Wadhurst (Map 33) and Forest Row (Map 34). We review and comment on the Council's defined boundaries and frontages in more detail as part of the health checks conducted by Carter Jonas for each centre (see Section 6-12 of this study).

2.29 Other issues and options relating to retail and town centre matters in the WLP IOR include:

- **Change of Use in Centres (Issue 15)** - the Council's preferred option is for a policy which restricts changes of use from A1 (shops) and A3 (restaurants/cafes) to uses other than A2 (financial and professional services), A4 (drinking establishments), A5 (Hot food takeaways) and D1 (non-residential institutions such as clinics, health centres, creches, churches etc) unless certain criteria are met which ensure the protection of the vitality of the town centre, or unless the change of use is otherwise permitted by the 2015 Use Classes Amendment Order.
- **Sizes of Retail Units within Centres (Issue 16)** - the preferred option is a policy which ensures that any proposal for new retail development or conversion of existing retail units contributes to the range and size of retail units available in order to help protect the vitality of the District's town and village centres.
- **Retail Allocations in Centres (Issues 17-18)** – In summary, Uckfield and Hailsham Town Centres are identified as having the greatest potential to accommodate new retail-led development. In Uckfield five potential options within or adjacent to the Town Centre are considered (Option 24), with the preferred option for new development focussed to the west of the High Street, north of Bell Lane, east of Belmont Road, Luxford Field and car parking area (Site Option 2). In Hailsham Town Centre the Council is working in partnership with Hailsham Forward, a business and regeneration partnership, and with the MASHH partnership[12] to help deliver improvements to the town centre. The Council has identified seven potential options for the provision of new retail-led development (Option 25) and the preferred option is to consolidate and reinforce retail provision around an "east-west axis" across the centre of the High Street (Site Options 5/6). Consideration is also given to the potential extension of the town centre via Station Road/ South Road to the eastern end of Diplocks Industrial Estate/ Ropemakers Park (Site Option 7); subject to the re-location of existing industrial units, further retail assessment and sequential tests. The issues and options set out in the WLP IOR will be further assessed in Stage 3 of this *2016 Retail and Town Centre Study Update*, based on the findings of the Stage 1 study and the Stage 2 *Needs and Demand Assessment*.
- **Retail Provision outside Town and Village Centre Boundaries (Issue 59) –** The Council states that there may be insufficient space available within or adjacent to existing town and village centre boundaries to accommodate the retail provision that may be required to support the housing growth proposed within the plan. Against this background the preferred option is for a Policy to guide out-of-

[12] MASHH stands for the Movement and Access Strategy for Hailsham and Hellingly.The partnership group meets to take forward transport improvements in the area.

centre retail provision by specifying locations where provision may be acceptable (subject to certain criteria). Such areas should be identified and assessed through further detailed retail capacity need assessments and subject to sequential tests.

2.30 In terms of housing, the Council in the WLP IOR has considered a number of options to meet the *Objectively Assessed Housing Need* (OAHN) from 2013 to 2033, and the under-supply of housing within the defined *Housing Market Area* (HMA) (see Figure 1 of WLP IOR). The different approaches tested include the **South Wealden Housing Option** (Option 3), which seeks to distribute development away from Ashdown Forest and the AONB, and concentrate development in the most sustainable centres. The main focus is on South Wealden, and the potential for a large scale urban extension around Hailsham/ Polegate to meet the OAHN and to contribute to the shortfall from other local authority areas. Some development is also identified to the north of the District where there is good access to Tunbridge Wells on an alternative route to the A26. The total number of additional houses identified is 14,635 dwellings and this increases to 19,962 after allowing for all commitments and the Core Strategy strategic sites up to 2015. Based on a plan period from 2013 to 2033, this equates to 998 dwellings per annum, which is 263 dwellings per annum greater than the District's OAHN. Of this total some 9,380 new homes are identified for Hailsham, which equates to 469 dwellings per annum.

2.31 However, the Council does not consider that this level of development can be achieved over the Plan period (i.e. by 2033) and therefore a longer time frame (to 2037) is considered as part of the WLP IOR consultation. The Council's preferred option therefore is to provide 832 dwellings per annum from 2013 to 2037. This would result in 2,328 more dwellings that forecast by the OAHN, equivalent to an additional 97 dwellings per annum. The proposed location of the new housing in the District's main centres/settlements is summarised in the table below.

Table 2.4 New Housing – Preferred Option and Distribution

	Number of Additional Dwellings to be Provided (including Outstanding Core Strategy Growth)	Dwellings per Annum from 2015
HAILSHAM	9,380	426
POLEGATE & WILLNGDON	1,000	45
STONE CROSS	500	23
HEATHFIELD	800	36
UCKFIELD	Windfalls that do not have an adverse impact upon Ashdown Forest SAC	-
CROWBOROUGH	140, + any windfalls that do not have an adverse impact upon Ashdown Forest SAC	7
EDGE OF TUNBRIDGE WELLS	320	15

Source: see WLP IOR (page 56)

2.32 The District's other smaller villages are also identified by the WLP IOR to accommodate approximately 1,810 new homes up to 2037. Of this total the main allocations are for Horam (400), Westham (350), Wadhurst (285) Ninfield (250) and Herstmonceux (230). The preferred strategy therefore involves the development of locations around towns and villages with a large scale urban extension(s) associated with Hailsham/ Hellingly/ Polegate/ Arlington. The number of new homes and allocations to the south of the District will also

help address the under-supply identified by Eastbourne Borough, subject to further evidence provided by the local planning authority.

2.33 Section 17 of the WLP IOR document considers the options for the location of the new housing for the main centres identified in Table 30. For Hailsham, for example, which needs to accommodate 9,380 new homes over the Plan period, the preferred option is to provide around 4,000 dwellings in the North/South East/ Southern Sectors adjoining the Town Centre, and to include infill development/redevelopment of the existing urban area. The first choice for the remaining 5,380 dwellings is the provision of an urban extension on land at West Hailsham with the re-routing of the A22 and the downgrading of the existing A22. However it is acknowledged that there are significant issues with regards to delivery. The second choice is the development within South Hailsham in the Parish of Hailsham/Polegate and the third choice is for land at West Polegate. The option of 9,380 dwellings is predicated on the improvements to the A27, or another alternative, and the delivery of other road and social infrastructure as well as the improved waste water treatment in Hailsham.

Review of Existing Retail Capacity Studies

2.34 The following provides a brief commentary on some the evidence-based documents that are most relevant to the preparation of *2016 Retail and Town Centre Study*.

Wealden District Interim Shopping Study (October 2008)

2.35 The WDISS was commissioned by the Council to inform the preparation of the *Preferred Options* for the Core Strategy. It comprised health checks of the District's five main towns (Crowborough, Hailsham, Heathfield, Polegate and Uckfield); a quantitative and qualitative assessment of the need for future retail floorspace; and the potential for the District's main centres to accommodate new floorspace. The study was underpinned by a household telephone interview survey conducted in 2007 across 15 postcode sector zones. The study was prepared on the basis of the South East Plan pre-submission housing target of 9,600 homes.

2.36 The study found that the main centres were generally healthy and mainly served the day-to-day shopping needs of the District's residents. It concluded that none of the centres were significant comparison goods shopping destinations, but added that this *"should not be seen as a failing, but a function of, in part, their size and also their proximity to 'higher order' centres such as Eastbourne and Tunbridge Wells"* (paragraph 8.3).

2.37 The study forecast capacity for 9,093 sqm net of new comparison goods floorspace between 2007 and 2016, and 2,847 sqm net of new convenience goods floorspace. The majority of this new floorspace was forecast for Uckfield (730 sqm net of convenience / 3,328 sqm net of comparison), Hailsham (671 sqm / 2,382 sqm net) and Crowborough (816 sqm / 2,093 sqm net).

2.38 It concluded that the need for new convenience floorspace could be accommodated through the improvement or extension of one or more existing foodstores in the main Town Centres. In terms of comparison goods retailing, the study advised that although there was forecast capacity for Uckfield, Hailsham and Crowborough, there was limited commercial interest at that time. Notwithstanding this, it

concluded that the opportunities for accommodating new floorspace on sites in Uckfield and Hailsham Town Centres should be explored, taking into account the Council's decision on where to allocate substantial new housing in the Hailsham/Polegate area.

Wealden Shopping Study – Addendum (April 2010)

2.39 The WDISS was updated in April 2010 to examine the impact of providing 11,000 new homes across the District up to 2027, and the potential impact of two different housing development scenarios[13]. The study also assessed the impact of the economic recession on forecast expenditure growth and demand, along with the opening of two Tesco stores in Crowborough (Sybron Way) and Hailsham[14]. The table below summarises the forecast capacity for new retail (convenience and comparison) floorspace in the District.

Table 2.5 Wealden Shopping Study – Addendum Report (April 2010): Forecast Retail Capacity (2007 – 2027)

	CONVENIENCE GOODS		COMPARISON GOODS	
Sqm net	**Option 1**	**Option 2**	**Option 1**	**Option 2**
Crowborough	610	687	5,248	5,446
Hailsham	1,618	1,275	8,446	7,820
Heathfield	291	311	2,947	2,990
Polegate	61	61	358	358
Uckfield	946	1,113	9,224	9,761
TOTAL:	**3,526**	**3,447**	**26,223**	**26,375**

2.40 The April 2010 Addendum Report confirmed the findings of the 2008 WDISS; namely that there was limited quantitative need for new convenience goods floorspace across the District. After taking into account known commitments at the time, the study concluded that the forecast capacity *"did not justify the allocation of specific sites to accommodate new foodstore development in any of the District's five main town centres"* (para 5.11).

2.41 In terms of comparison goods retailing the April 2010 Addendum Report identified that under both housing development options there was a forecast need for more floorspace, particularly focussed on Hailsham and Uckfield due to the potential new housing proposed for these settlements. As a result the study advised that both centres should be developed and enhanced to meet the forecast need and to ensure sustainable shopping patterns.

2.42 However, the study also found that *"commercial demand for new non-food retail floorspace at the current time is weak"* (para 5.45) and therefore the potential to deliver major new retail-led schemes in either centre was weak. Finally, although new floorspace capacity was identified for Crowborough, the study advised that the influence of Tunbridge Wells on shopping patterns and market demand meant it was unlikely that there would be any commercial demand for development of the scale suggested. Similarly for Polegate, the town's proximity to Eastbourne shopping facilities meant there was no need for major new comparison shopping floorspace in the town.

[13] Scenario 1 identified the potential for 3,190 new homes in Hailsham and 950 in Uckfield; and Scenario 2 envisaged the need for 2,190 homes in Hailsham and 1,505 units in Uckfield. Both scenarios identified the potential provision of over 900 homes around Polegate over the 20 year period.

[14] A new household survey was not carried out as part of the April 2010 Addendum Report. As a result the authors of the report – Chase & Partners – made their own assessment of the new stores' likely turnover, trade draw and potential impact on existing stores and market shares.

Wealden Shopping Study – Addendum Report (November 2010)

2.43 Following the abolition of the Regional Spatial Strategies in July 2010 the Council revisited and revised the proposed new housing development and reduced the target from 11,000 to 9,600 new homes. The forecast period was also extended to 2030 in line with policy guidance. The WSS Addendum Report produced in November 2010[15] assessed the impact of the final preferred growth scenario on retail needs. The table below summarises the revised retail floorspace capacity figures for the five main towns.

Table 2.6 Wealden Shopping Study – Addendum Report: Forecast Retail Capacity (2007 – 2030)

Sqm net	Convenience	Comparison	TOTAL
Crowborough	610	5,284	5,894
Hailsham	873	5,357	6,230
Heathfield	155	1,571	1,726
Polegate	47	276	323
Uckfield	996	9,708	10,704
TOTAL:	**2,681**	**22,196**	**24,877**

2.44 Based on the findings of the 2008 WDISS and the April 2010 Addendum, the Council revised the capacity figures downwards to 16,934 sqm net over the Plan period to inform the preparation of the *Pre Submission* Core Strategy. The final capacity figures identified the need for 10,704 sqm net in Uckfield (as set out in the table above); 5,930 sqm net in Hailsham; and an additional 300 sqm net to reflected the development of a new neighbourhood centre to serve new housing commitments to the north of Hailsham/Hellingly.

Review of Town Centre Visions, Masterplans and Strategies

2.45 Wealden District Council has been actively involved in supporting the preparation of various local visions, masterplans and strategies for a number of the District's centres by their respective Town and Parish Councils over recent years. The visions, masterplans and strategies are at different stages of preparation and the table below summarises the current position[16]. It should be noted that the preparation of this 2016 RTCS Update has taken these various visions, masterplans and strategies in account, and this has been further underpinned by consultations with key stakeholders.

[15] Revised Retail Floorspace Figures for the Wealden Draf47t Core Strategy, prepared by Wealden District Council (November 2010)
[16] Informed by the *Wealden Local Plan IOR* (October 2015) and Core Strategy Submission Document - *Background Paper 7: Summary of Town Masterplanning Documents* (August 2011).

Table 2.7 Town and Village Centres – Local Visions, Masterplans and Strategies

Uckfield Town Centre Masterplan, August 2007	The vision statement is for *'A contemporary market town with an 'up-market' image known for its successful and varied shopping facilities and commercial opportunities, offering an attractive and welcoming environment, maintaining its own distinctive identity and acting as a hub for surrounding towns and villages.'* A number of objectives have been outlined within the masterplan, and initiatives to take forward parts of this vision are underway as part of the Uckfield Town Centre Regeneration Partnerships work.
Hailsham Town Centre Retail Capacity Study, October 2008	Hailsham Town Council commissioned Tibbalds Planning & Urban Design in October 2008 to prepare a Retail Capacity Study to help assess the amount of additional retail floorspace that could physically be provided within the Town Centre between 2006 and 2026 (the Plan period at the time); identify opportunities for new retail to enhance the vitality and viability of the Town Centre; and to ensure that future retail floorspace contributes to the distinctive character of Hailsham as a Wealden Market Town. The study identified the potential for the redevelopment of a number of sites in the town centre, including The Qunitins and Vicarage Fields area. In summary the study concluded that there was scope in physical terms for significant retail development within the Town Centre; with the potential to enhance Hailsham's overall vitality and viability by the replacement of buildings that currently detract from the town's character and appearance. However this would need to be subject to further assessments of the potential impact of new development on transport and highways infrastructure.
Hailsham and Hellingly Masterplan, 2009	Outlines a vision which seeks to improve Hailsham's economic performance and accessibility; enhance the town's role as a service centre; improve the retail offer; reduce congestion and the impact of through traffic in the historic town centre; improve local services; maximise opportunities for town centre regeneration; and maintain a cattle market in the vicinity of the town. The Masterplan also considers all development opportunities and provides a set of medium to long term objectives to support the town centre. These include supporting the development of a niche town for destination shopping and experiences; retaining the retail focus in the 'centre triangle' around Vicarage Lane, High Street, George Street and North Street; supporting a 'limited pedestrian priority' High Street; improving the visual appearance of shops; and improving the shopping experience, through provision of rain canopies, public toilets and covered seating for waiting bus and taxi passengers.
'Top of the Weald – A vision for Crowborough 2010-2030', May 2010	Produced by the Town Council it outlines a Vision that by 2030 Crowborough will be 'A vibrant, attractive and inviting town with a strong community spirit at its heart. A town in touch with its past, looking to the future and protective of its outstanding heritage and natural surroundings.' The Town Council has identified 8 working aims, which include providing a "thriving and dynamic" town centre through improvements to the high street, including shop front improvements, pedestrianisation or measures to reduce traffic congestion; creating a night time economy; developing a regular weekend market in a permanent location; supporting and incentivising new and existing businesses in the high street; and providing an attractive communal space. It also proposes the creation of a distinctive visitor destination, and the preservation and enhancement of the town's natural and built environment.
Heathfield Vision, April 2008	The Parish Council's 'Vision for Heathfield' seeks to maintain the town's prominent position and to achieve this it 'must continue to be a service centre for the surrounding area, especially the satellite villages, most of which have already lost their shops and post offices. Residents for miles around need more specialist shops as well as professional services such as doctors, dentists, banks, solicitors and accountants. Hence the retention of free parking will continue to be essential to encourage economic sustainability for employers, their employees and customers. It is also hoped that the central location will ensure the retention of the fire and ambulance services in the town but hopefully in more modern facilities, perhaps on a shared site on the outskirts of Heathfield. The situation of these services is vital to the outlying villages.'
Polegate Masterplan Visioning Document, February 2012	The Town Council's visioning document outlines 9 Spatial Vision objectives for Polegate, including improvements/redevelopment of the Rail Station and adjoining Town centre with more intensive use of land, an improved environment and choice of shops. The visioning document supports a focus for the re-development of the Town centre around 'The Centre' shopping mall and the railway station and suggests "bold and radical interventions" may be needed, backed by compulsory purchase if necessary, in order to create larger retail units which may encourage larger national retailers to Polegate. The document also suggests that all suitable, radical proposals to improve and upgrade the Town centre should be considered, including any that will increase retail space by incorporating land currently occupied by residential properties. The Masterplan recognises that there are challenges to achieving the vision, including the impact of permitted development and an increase in internet based businesses.
Forest Row – Masterplan Survey, 2009	The Parish Council's survey informed the preparation of the Core Strategy Local Plan. The survey focused on a number of issues relating to the potential future planning and development of Forest Row. The village is largely considered to be self-sufficient in the context of eating and day to day shopping,. However, a greater range of shops and prices was considered key to the sustainability of the centre for local people. In addition, environmental, streetscape, and shop front/ signage improvements, particularly in relation to the Conservation Area, were seen as desirable to create a more vibrant centre, together with floral displays and a continuation of/provision of additional free car parking.
Wadhurst	Wadhurst Parish Council does not currently have a vision statement or masterplan

Source: see WLP OIR (Table 1, page 120)

2.46 The Council is also preparing the Hailsham AAP. The Local Development Scheme identifies that this will be developed, submitted and examined at the same time as the emerging Wealden Local Plan, and will provide the specific policies that will direct the significant change that is proposed for Hailsham and the surrounding area. This additional document will contain, *inter alia*, policies for Hailsham Town Centre including allocations for specific town centre uses; the infrastructure directly associated with the development of 9,380 dwellings within and around Hailsham; policies to deliver the urban extensions of Hailsham, and possibly Arlington and Polegate; and phasing of development, including the location of different types of development within strategic allocations. The scope of the AAP will not include strategic sites in Hellingly to the north of Hailsham, as polices concerning this strategic development will be contained within the Wealden Local Plan.

2.47 Finally, the '*Streets Ahead'* Project was established by Wealden District Council in 2013 to work with the local Parish and Town Councils and partnerships. The project has five key objectives, namely to support local high street regeneration efforts; assist with District-wide joined up strategic solutions; stimulate supporting economic growth; improve perceptions of Wealden's high streets; and to position Wealden as a leader of innovative high street regeneration[17]. The most recent Newsletter issued in Spring/Summer 2016 (Issue 3) highlights the fact that Streets Ahead have secured £5,000 for Digital Business Skills to help train smaller businesses to promote and market their offer online. The WLP IOR also refers to an action plan to take forward initiatives and to strengthen partnerships within town centres.

Summary

2.48 In summary, the underlying objective of both national and local plan policy is to direct new development and investment to town centres first. In this context this *Town Centre and Retail Study* (Stages 1-3) will provide the necessary robust and sound evidence based required by the Council, and carried out in accordance with the NPPF, to help inform the preparation of the new Wealden Local Plan and Hailsham AAP.

[17] http://www.wealden.gov.uk/Wealden/Business/Market_Towns_and_Rural_Regeneration/StreetsAhead

3 THE CHANGING RETAIL, LEISURE AND URBAN LANDSCAPE

3.1 This section summarises some of the key trends that have fuelled the changes in the retail and commercial leisure sectors over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

Retail Trends

3.2 Following an unprecedented period of growth in retail sales and expenditure since the mid-1990s, the onset of the longest and deepest economic recession in living memory in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This reduced disposable income and retailers' margins were squeezed further.

3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to 2.2% in 2015 against the backdrop of a waning global economy and further uncertainty on financial markets. The Brexit vote may further dampen business/consumer confidence and the prospects for growth in 2016. Although the short and long term impacts of Brexit are uncertain, it is likely that real disposable income growth, which experienced the strong growth recorded in 2015 (+3.4%) since 2001, will fall back.

3.4 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest pre-Brexit Retail Planner Briefing Note 14 (RPBN 14).

Table 3.1 Forecast year-on-year growth in retail expenditure per capita

Vol. Growth per head (%):	----------ACTUAL GROWTH----------							EXPERIAN FORECASTS				TRENDS	
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019-23	1997-07	1997-15
Total Retail Spend	-3.1	-0.1	-0.4	1.3	1.1	3.6	2.5	2.1	0.9	0.3	2.0	5.1	3.3
Convenience	-4.4	-1.5	-2.5	-0.5	-0.6	-1.7	-1.1	0.0	-0.2	-0.9	0.0	-0.3	-1.0
Comparison	-3.1	0.6	0.8	2.5	2.2	7.2	4.6	3.3	1.4	1.0	3.0	8.0	5.6

Source: Experian Retail Planner Briefing Note 14 (November 2016); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2015).

3.5 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels since 2009, and this trend of negative or no growth is forecast to continue up to 2023. Experian forecast growth of +0.1% per annum for over the long term, between 2024 and 2035. The forecast growth rates are above previous negative historic trends (1997-2014) of -0.3% (1997-2007) and -1.1% (1997-2015).

3.6 For comparison goods Experian forecast that annual growth rates are recovering from a low of -3.1% in 2009, to a peak of +7.2% in 2014, before falling back to +4.6% in 2015. Experian forecast that growth will average +3% per annum for the period 2019-23, increasing slightly to +3.2% between 2024 and 2035. Despite the return to growth forecast by Experian, it is clear that growth rates are well below historic trends of +8% per annum[18]. Furthermore, the retail sector is still vulnerable to fluctuations in the UK economy, and how it responds in the future to changes in the Eurozone (including the outcome of Brexit) and global economies (such as the slowdown in growth in China's economy). This further dampening of growth rates has implications for the viability of existing retail businesses and the capacity for new retail floorspace over the short to medium term.

3.7 Experian's research also shows that retail sales have prospered in the past two years on the back of buoyant consumer confidence and spending. However Experian warn that this buoyancy is true only in sales volume terms, as values have been depressed by heavy discounting and persistent deflation of goods prices. Experian (pre-Brexit) forecast that retail sales volume growth will ease from around +4% growth on average over the past two years, to +2.9% in 2016 given the dampening in consumer spending power. They also forecast that growth will continue at the same levels in 2017 as welfare cuts and rising interest rates bear down on spending, offsetting the gains from continuing overall economic growth. However, these forecasts will need to be updated in light of the Brexit vote.

Special Forms of Trading and Internet Shopping

3.8 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of special forms of trading (SFT)[19]. Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2016) value of internet sales is £48.9bn (current prices) and other (non-internet) SFT sales stand at approximately £8.5bn. This results in total SFT sales of £57.4bn in 2016 (£56.2bn in 2012 prices). This is equivalent to a circa 229% increase from £17.1bn recorded in 2006 (2012 prices).

3.9 Overall the market share of SFT as a proportion of total retail sales has increased nationally from 5.5% in 2006 to 14.9% in 2016, and is forecast by Experian to increase to 19.7% by 2026 (see table below)[20]. This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.

[18] This covers the period 1997 to 2007

[19] Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

[20] Such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has produced revised forecasts to reflect the proportion of internet sales sourced from existing stores.

Table 3.2 SFT's market share of total retail sales

	2016	2021	2026	2031
TOTAL:	14.9%	18.2%	19.7%	20.4%
Comparison	17.6%	20.8%	21.5%	21.8%
Convenience	10.1%	13.0%	15.4%	16.7%

Source: Appendix 3 of Experian Retail Planner Briefing Note 14 (Figure 5)

3.10 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares downwards to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 Revised forecast growth in SFT's market share of total retail sales

	2016	2021	2026	2031
TOTAL:	**9.6%**	**11.7%**	**12.7%**	**13.3%**
Comparison	13.2%	15.6%	16.1%	16.3%
Convenience	3.0%	3.9%	4.6%	5.0%

Source: Appendix 3 of Experian Retail Planner Briefing Note 14 (Figure 5)

3.11 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (the most recent examples being the rationalisation of HMV stores across the UK and the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping in Wealden District (see Section 4).

3.12 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a "digital divide" between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's High street communities. Yet the success of firms at both ends of the "divide" is mutually dependent, and is essential to a successful high street.

3.13 Notwithstanding the clear and present impact of the digital revolution on how people shop and 'play', some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient '*click and collect*' facilities to help drive footfall; whereby customers can order a product on-line and then collect it from a local store at their

convenience. This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its *'click & collect'* service account for circa 31% of the company's total turnover. Amazon also has an agreement with the Co-operative to locate self-service lockers' in local stores, an example of which was seen in Runcorn Old Town.

3.14 Further to this is the potential for '*showrooms'* on the high street, where customers can view and test products in-store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of town centres over time, and the demand for retail space.

Floorspace 'Productivity' Growth

3.15 Floorspace *'productivity'* (or turnover *'efficiency'*) growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as rents, rates and service charges) to help maintain their profitability and viability. It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing comparison and convenience goods retail floorspace. However there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

3.16 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for 'non-store' (SFT) retailing.

Table 3.4 Forecast 'productivity' growth rates

	2015	2016	2017	2018	2019-23	2024-35
Convenience	-1.2	-0.3	-0.1	-0.4	-0.1	0.1
Comparison	+5.3	+2.7	+1.5	+1.0	+2.3	+2.2

Source: Figures 4a and 4b, Experian *Retail Planner Briefing Note 14*

3.17 The forecasts show that the scope for sales density growth is very limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of around +2.2% to +2,3% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century.

3.18 The floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in the Stage 2 report. It should be noted at this stage that we consider that existing retailers and new floorspace in the District will be capable of achieving higher annual growth rates than

predicted by Experian due to the forecast growth in population (and therefore available expenditure), and also be the fact that they will need to cover their increasing occupancy costs in order to remain viable.

Impact of Out-of-Centre Retailing

3.19 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out of centre locations has not diminished. Research[21] shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.

3.20 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.

3.21 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods[22] retailing to the provision of larger stores selling fashion and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).

3.22 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.

Changing Retailer Requirements

3.23 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.

[21] Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival

[22] 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.

3.24 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years, which was principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) has now shifted to growing market share through new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out[23]. At the other end of the grocery spectrum, the European-led 'deep *discount'* food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by foodstore in the future.

3.25 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive *'middle ground'* between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have significantly reduced their store portfolio in centres across the UK (e.g. HMV, Blockbusters, etc.). Although the number of retailer 'casualties' has slowed over the last 12-18 months, there are still a number of traditional high street retailers that have recently been forced into administration, most notably BHS and Austin Reed.

3.26 Research also shows that there is an increasing concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres), and specifically on the prime retail pitches, with the secondary and tertiary pitches deteriorating. This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.27 In addition to focusing their attention on larger, dominant centres, many of the multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology. As a result it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, Marks & Spencer has recently closed its traditional variety stores in Harlow, Great Yarmouth and Rugby,

23 For example, Tesco is disposing of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

and opened new stores in out-of-centre locations. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations.

3.28 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

Vacancy Levels

3.29 The impact of retail closures in town centres due to administration (beginning with Woolworths in 2008) and portfolio rationalisation has led to a dramatic increase in national vacancy rates. Experian indicate that national average vacancy levels almost doubled between 2006 and 2013, from circa 7% to 16%, and although vacancies fell back to just over 13% in 2015, these national average figures do 'mask' the reality for different centres and locations.

- First, research shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more "healthy" centres, closer to London and the south-east have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull is resulting in vacancy levels over 20-25%.
- Second, since 2012[24] a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's and early 1990's and more recently agreed sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation as they adjust their store requirements for the new multi-channel environment.
- Third, in many centres, there can be as many as 25–30% of the occupied shops on temporary short-term lets, with little or no rent being paid[25].

3.30 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth[26].

3.31 In cases where these vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth centres, etc. Another option is 'meanwhile leases' which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Furthermore local planning

[24] Jones Lang LaSalle, Property Predictions, 2012.

[25] Sourced from Beyond Retail (2013)

[26] London Assembly Economy Committee: *Open for Business. Empty shops on London's high streets* GLA, March 2013.

authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, Area Action Plans and other planning tools.

Trends in Retail-led Investment and Development

3.32 The weak UK retail economy, the low growth in retail sales volumes and the adverse impact of vacant space all combined with the absence of development finance to create a very difficult climate for new shopping centre development and investment in town centres since 2007. One of the key impacts was to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

3.33 The *Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) shows that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets, principally in prime and secondary locations, that offer the potential for growth. In terms of new development, three major schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds). This was followed in 2014 by the scheme in Hereford, where the Old Market was redeveloped via a partnership between the Council, Stanhope and British Land, and is anchored by Debenhams, Waitrose and Odeon. In 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport (see case study).

FRIARS WALK, NEWPORT, GWENT

Following the failure of previous retail led regeneration projects in Newport, the City Council began to implement a CPO strategy in 2010 to acquire land in its own name. It also commissioned a full design team to redesign the scheme, hold developer workshops and secure a new development partner, with Queensberry Real Estate appointed in September 2011. In order to expedite design, planning and pre-letting, the Council then supported the developer by contributing £2m towards seed funding which greatly reduced the overall delivery programme and provided confidence to retailers of an opening window. It then secured a £1.5m grant from the Welsh government to progress demolition and site enabling work, prudentially borrowed £90m to provide a development loan facility to its development partner on commercial terms and committed a transport grant and capital funding towards the cost of a new integrated bus station. In a coordinated private / public sector collaboration akin to a commercial joint venture, Queensberry has been able to engage in direct dialogue with key anchor retailers throughout the entire process, helping to maintain momentum and confidence in the scheme. These same retailers have also been reassured to see the Council's £2m investment in high street public improvements and the renovation of the Municipal Market at the same time Friars Walk Shopping Centre (400,000 sq ft) opened on 12 November 2015. Major retailers secured include Debenhams, H&M, Next, Topshop and New Look, as well as an eight-screen Cineworld, and eleven restaurants. By taking a direct interest in the financing of the development, and fully supporting its development partner, the Council ensured it achieved the scheme they wanted and was instrumental in creating a retail-led, mixed use project. Most importantly, the development is of sufficient critical mass to act as a catalyst to further future investment and deliver a step change in the perception of Newport City Centre.

3.34 Recent trends suggest that average scheme size is generally smaller than during the 'golden age' of shopping centre development - less than 27,870 sqm (300,000 sq ft) - other than in the largest cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer (see case study).

HOUNSLOW HIGH STREET QUARTER, LONDON BOROUGH OF HOUNSLOW
The development of the Blenheim Centre in 2006, intended as phase one of the town centre regeneration, with a major Asda store and surface parking, had become isolated with weak links to the existing high street pitch. The high street was also declining due to a lack of right sized larger units for modern retailing and phase two of the project re-establishing links to the high street had become essential. Hounslow Council commissioned a comprehensive masterplan in 2012 which identified the preferred development site to enhance the town centre retail and leisure offer. The Council then selected a development partner - Barratt London and Wilson Bowden - following a comprehensive marketing and procurement strategy. The Council also resolved to use its Compulsory Purchase Order (CPO) powers to assemble the site and secured £500,000 in Round One of the Outer London Fund for a programme of shopfront improvements, events, and street markets. It also secured the largest combined award in Round Two for Hounslow high street and Brentford, worth £3m, matched by £750,000 from Hounslow Council. The investment kick-started the regeneration of Hounslow and Brentford town centres. With £100,000 of support from the Mayor's Outer London Fund, Hounslow improved traders' shopfronts in Hounslow and Brentford. The Council has a vision to transform Hounslow town centre into one of west London's most vibrant and exciting shopping and leisure destinations. Working with its development partners, the circa £100m leisure-led and mixed-use development in Hounslow town centre has been granted planning permission. Known as 'High Street Quarter', the scheme will provide 400 new residential units, a multiplex, restaurants, public space and underground parking.

3.35 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the District's main centres and the delivery of a realistic retail vision.

3.36 Given that it takes on average over ten years for a town centre scheme to be planned and developed, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Town centre redevelopment is complex and complicated by fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's retailer requirements. As a result, local planning authorities will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the recent BCSC research *'Enabling Retail Development'* (2015) which identified the following interventions by local authorities based on their case study research:

- **Investor**: Newport (see case study), Sheffield, Oldham, Walsall
- **Developer**: Sheffield , Oldham, Bradford, Walsall
- **Masterplanner/site assembly**: Ealing, Hounslow (see case study), Newport
- **Owner and management company**: Woking (see case study)
- **Public Realm delivery**: Hemel Hempstead, Bradford
- **High Street improvements and grants**: Newport, Hounslow, Bradford

3.37 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 100' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure

offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres. So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

WOLSEY PLACE, WOKING

Woking Council's business development strategy at the start of the millennium was to expand the number of major head office buildings in the Borough, and create new inward investment through business development. However these objectives were being undermined by the sub-standard town centre environment. Lack of direct control in the town centre made a remedy difficult to achieve. The purchase of the Peacocks shopping centre by Northern Irish investors Moyallen was the catalyst for change. A willingness to engage positively and collaboratively with the local authority provided the foundation for a joint venture which has transformed the town centre. Woking Borough Council purchased Wolsey Place shopping Centre in 2010 to ensure direct control. It created a management structure with Moyallen to create Woking Shopping, to ensure the town centre enjoyed effective asset management and tenant mix planning. This saw private sector experience and expertise supporting the creation of a credible plan to deliver on key objectives over a defined timescale. The first phase saw the exploration of deficiencies in the town centre offer and creation of plans to remedy these deficiencies quickly. This resulted in a phased programme to upgrade the public realm, introduce new family dining offers and further refine the retail offer, resulting in new traders opening in Woking. The Council then looked at a more ambitious project to deliver a new M&S store – to provide an opportunity for associated development and new hotel accommodation, as well as a strong market for town centre apartments on Victoria Square. Both the Borough Council and County Council have taken a direct interest in the proposals which provide for a new 60,000 sq ft M&S store with 58,000 sq ft of associated retail, a 190 bedroom hotel with Spa, conference facilities and restaurants. The plan also features two new civic spaces and associated new public realm, 392 apartments in two towers and 380 new car parking spaces. Site assembly for Victoria Square has required the relocation of the market, with a collaborative approach between Woking and Moyallen market specialising in food. The approach supported the vision to enhance the town centre environment by creating improved public realm, a better retail offer and a significantly improved and enhanced trading opportunity for the market. The positive impacts to date have included increased footfall, improved car park usage, better quality retailers and improved engagement with the local shopping catchment. Also, to validate the original criteria, over 100 new inward investment enquiries have been received in the last two years, over 1,000 new jobs have been created and over £3.5m of new third party funding has been attracted.

3.38 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators[27] argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

Independents and Markets

3.39 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure the prime locations in our town centres. However this does not underestimate or undervalue the important role of small independent shops[28] and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called "clone towns"[29] due to the increasing colonisation of centres by larger chain stores.

> *"Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people.*

27 English Heritage (2013), The Changing Face of the High Street: Decline and Revival

[28] Defined by the Town Centres SPG as a shop with a gross floorspace of 80 sqm or less.

[29] New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)

Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home." (New Economics Foundation, Reimagining the High Street, 2010)

3.40 Notwithstanding this research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors, including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).

3.41 In terms of street markets, the *1994 Rhodes Report* into the Retail Market sector demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the High Street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to "*retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive*". The Portas Review also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first '*Love Your Local Market Fortnight'* (LYM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies, and there is a Minister with responsibility for Town Centres and Markets. The Great Yarmouth MP Brandon Lewis held this position in the first year and Marcus Jones MP is now the current Minister. It is important to note however that whilst DCLG continue to support the market industry the initial government funding for LYLM is ending.

3.42 Retail Markets continue to make a meaningful contribution to Towns and Cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade, as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the residents of the borough creating a vibrant and successful market, this will in turn attract visitors from outside the borough and increase the value of the market. Recent research documents supporting the benefits of Markets can be found via the following link: http://www.nabma.com/publications/research-documents/.

3.43 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls is a difficult balancing act for local planning authorities. It will be a greater challenge going forward with the threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre's offer is not undermined by the new retail brands.

Summary

3.44 In conclusion there are positive signs that the UK is emerging from the shadow of the longest and deepest economic downturn in living memory, but it is clear that our town centres and high streets post-recession are

facing a myriad of challenges and pressures to simply retain retail businesses, let alone attract new investment and development.

- First, although the economy in general and retail sector in particular is forecast to experience growth over the short to medium term at least[30], albeit at a slower pace than in 2014 and 2015, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit.
- Second, the growth of online shopping is impacting on the vitality and viability of many of Britain's centres and high streets.
- Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky conditions' on existing retail parks.

3.45 These trends, and others, are placing pressures on rental growth and market demand in many centres; particularly the smaller secondary centres and market towns outside the 'top 100' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores[31]

3.46 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:

- At one end of the spectrum the larger, **more dominant centres** will get stronger; attracting high profile domestic and international retailers and combining these attractors with an increasingly diverse leisure and food and beverage offer.
- At the other end of the spectrum the **smaller local and neighbourhood centres** are less affected; they are principally meeting the everyday retail, service and community needs of their local ('walk-in') resident catchment populations.
- It is the **medium-sized towns** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements.

[31] Javelin Group, How Many Stores Will We Really Need?, 10 October 2011.

3.47 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities). This is because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.

3.48 With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively 'push up' rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space.

3.49 Therefore those shopping locations that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations, with good accessibility, parking, etc) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than compete with the centre's existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre's overall vitality and viability.

3.50 In this context, it is clear that the 'top 50-100' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing local planning authorities will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

3.51 This provides the important background and context for assessing and understanding the potential for new retail investment and development in Wealden District and its main centres over the short, medium and long term.

4 STUDY AREA AND SHOPPING PATTERNS

4.1 This section first defines the catchment/study area that provides the framework for the household telephone interview surveys (see **Appendix 1**) and economic capacity assessment. It then briefly describes the household telephone interview survey methodology and approach, including the scope of the questionnaire that was prepared in partnership with Wealden District Council (see **Appendix 2**). Finally, it summarises some of the key headline findings of the survey-derived market share analysis for convenience and comparison goods retailing, including the impact of *Special Forms of Trading* (SFT) on different types of shopping purchases. This review draws on the full 'weighted' survey results and tabulations set out in **Appendix 3** to this report.

Study Area and Zones

4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using postcode geography and covers Wealden District in full, as well as extending to the urban areas of Royal Tunbridge Wells, Eastbourne, Lewes and East Grinstead (see Appendix 1). The Study Area has been sub-divided into nine zones based on postcode geography, and taking into account the location and primary local catchments of the main centres and shopping facilities in the District (see Table 4.1).

Table 4.1 Study Area – Zones, Postcode Sectors and Catchments Areas

4.3

Zones	Postcode Sectors	Broad Geographic/ Catchment Areas
1	BN24 5, BN24 6, BN27 1, BN27 2, BN27 3, BN27 4, TN33 9, TN39 5	Hailsham
2	TN20 6, TN21 0, TN21 8, TN21 9	Heathfield
3	TN22 1, TN22 2, TN22 3, TN22 4, TN22 5	Uckfield
4	TN6 1, TN6 2, TN6 3	Crowborough
5	TN3 0, TN3 8, TN3 9	Crowborough /Royal Tunbridge Wells
6	RH17 7, RH18 5, RH19 3, RH19 4, TN7 4	East Grinstead
7	BN8 4, BN8 5, BN8 6	Lewes
8	BN20 0, BN25 3, BN25 4, BN26 5, BN26 6	Polegate / Eastbourne
9	TN5 6, TN5 7, TN19 7, TN32 5	Royal Tunbridge Wells

provide the sampling framework for the household telephone interview survey. The zone-by-zone approach enables more detailed analysis of shopping patterns and expenditure flows both within and outside the study area for the purpose of the retail capacity assessment. This is in accordance with good practice.

4.4 In this case Zone 1 broadly represents the *''Core Catchment Zone' (CCZ)* for Hailsham. This zone covers Hailsham urban's population and surrounding areas, and is the area from which the town centre would be expected to draw the majority of its shoppers and expenditure, and achieve its highest market share within the defined study area. The *'CCZs'* for Heathfield, Uckfield and Crowborough are broadly covered by Zones 2, 3 and 4 respectively.

4.5 For the purpose of our assessment we have assumed that Zones 1-6 and Zone 8 represent the Wealden District local authority area. However as Plan 1 (**Appendix 1**) shows, some of these zones extend beyond the District boundary, as it was not possible to accurately define the local authority boundary based on postcode geography. For example Zone 6 includes part of East Grinstead's urban area to the north and also extends as far as Hayward's Heath to the east. The market shares identified for the broadly defined local authority area will therefore be 'diluted' by the fact that the some of the zones cover neighbouring areas and centres.

Household Survey

4.6 NEMS Market Research carried out 1,002 telephone interview surveys across the defined study area and zones between 22nd June and 6th July 2016. The questionnaire was designed by Carter Jonas (CJ) in collaboration with the local planning authority (see **Appendix 2**). The interviews were conducted across nine zones and NEMS carried out structured interviews by telephone with the person responsible for the main household shop. A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the person responsible for shopping in the household. Responses across the study area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated areas were not under or over represented in terms of the market share assessment. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

Convenience Goods - Market Share Analysis

4.7 Convenience goods[32] retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). In order to determine and assess current food shopping patterns across the Study Area, the household survey comprised standard questions on:

- where households "normally" carry out their weekly or fortnightly main 'bulk' (trolley) food purchases (question 1),
- what people like about the store/centre (question 2) mention in question 1, and how they normally travel there (question 3);
- whether they link their main food shopping trip with any other activities (question 4). and where they go for this (question 5);
- whether households also regularly visit any other stores for main 'bulk' convenience goods purchases (question 6);
- where households carry out more frequent (often daily) 'top-up' (basket) purchases (question 7), and whether they visit any other stores for this form of shopping (question 9); and
- what proportion of their spend on food and household groceries is spent on main food shopping (question 8).

[32] For the purpose of this retail assessment 'convenience goods' and 'food' shopping have the same meaning.

4.8 The results for main, secondary and top up shopping are then merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have assumed a standard weighting of 65% for primary main 'bulk' shopping, 10% for secondary main 'bulk' shopping, 15% for primary top-up shopping, and 10% for secondary top-up shopping[33]. This weighting produces a composite pattern of food/convenience goods spending and has been used to identify market shares, expenditure and turnover throughout the remainder of this study. As stated previously, the survey-derived market share analysis reviewed in this section includes the market shares for *Special Forms of Trading* (SFT), including internet shopping, but excludes 'null' responses[34]. A more detailed explanation of SFT is provided in Section 3.

4.9 The tables in **Appendix 4** provide the detailed market share analysis for all convenience goods shopping (Table 1), based on the market shares for main 'bulk' food shopping (Tables 2-3) and 'top-up' food shopping (Tables 4-5). The following briefly sets out the headline findings of the survey.

Online Food Shopping

4.10 Table 1 (**Appendix 4**) shows that some 6.3% of all respondents across the whole study area (Zones 1-9) shop online for all their food purchases. In line with national trends, the survey results confirm that a higher proportion of respondents (9.3%) shop online for their main 'bulk' food shopping purchases (see Table 2), than for more frequent 'top-up' food shopping (1.3%) (see Table 4).

4.11 Experian's latest *Retail Planning Briefing Note 13* (October 2015) forecasts that the national average market share for non-store (SFT) convenience goods retail sales is currently 10% (see Section 3). Given that SFT currently accounts for a smaller market share in the District (6.3%) than the national average, this suggests that there could be potential to increase its market penetration in the future. If this was to occur, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2037 (see Section 11).

4.12 Across the study area the market share of online shopping for all food (i.e. main and top-up) purchases ranges from a high of 8.9% in Zone 7, to a low of 2.7% in Zone 4 (Table 1, Appendix 4). The lower market share in Zone 4 reflects the relatively good choice, quality and accessibility of foodstore provision in Crowborough. In general terms, there tends to be a greater reliance on online food shopping in areas that are not as well served or accessible to main food shopping facilities.

Main Food Shopping

4.13 Table 2 (**Appendix 4**) shows that the District's food and convenience stores are achieving a total market share of main 'bulk' food shopping of 44.7% across the entire study area. The 'retention' level increases slightly to 48.5% within the broadly defined local authority area (Zones 1-6 and 8).

[33] Primary main 'bulk' food shopping and primary 'top-up' shopping accounts for expenditure at stores visited most frequently for convenience shopping categories. Secondary main 'bulk' food shopping and secondary 'top-up' shopping expenditure equates to spend directed to stores used less frequently. Primary and secondary stores are identified in the household survey.

[34] 'Null' responses include, for example, "don't know", "cannot remember", "never purchased those types of goods", etc.

4.14 A more detailed analysis of main food shopping patterns within the 'Core Catchment Zones' (CCZ) of the main Town Centres[35] in the District has identified the following key trends:

- **Hailsham (Zone 1)** – Overall the District's foodstores are achieving a total 'retention' level of 51.8% in Zone 1, with 39.4% 'leaking' to stores outside the District. Hailsham Town Centre is achieving a market share of 51.4% and its most popular foodstores are Tesco at North Street (31.9%), Asda in The Quintins (6.1%) and Waitrose in Vicarage Field (12.5%). The main 'leakage' of spend from this zone is to the foodstores in Eastbourne (24.4%), including to the out-of-centre Asda in The Crumbles (5.9%) and Tesco Extra at Lottbridge Drove (4.1%).
- **Heathfield (Zone 2)** - The District's foodstores are achieving a 'retention' level of 67.8% in Zone 2. Heathfield Town Centre has a 31.1% market share, and this is mainly accounted for by Co-Op on the High Street (22%) and Sainsbury's on Station Road (9.1%). The out-of-centre Waitrose at Station Road also has a 7.9% market share. Hailsham (12.7%), Crowborough (3.7%) and Uckfield (1.4%) Town Centres also draw shoppers and expenditure from Zone 2. The main 'leakage' is to Eastbourne (11.7%) and Tunbridge Wells (5.6%).
- **Uckfield (Zone 3)** – The District's foodstores are achieving a strong 'retention' level of 86.8% in Zone 3. Uckfield Town Centre has a high market share of 73.9% and the main stores are Tesco at Bell Farm Road (52.5%) and Waitrose on the High Street (21.7%). Crowborough Town Centre is also achieving a 9.4% market share in Zone 3. There are no major out-of-centre foodstores in Uckfield. The overall 'leakage' to competing stores outside the District is limited (7.8%) and the main competing stores are in Lewes (3.2%) and Haywards Heath (2.1%).
- **Crowborough (Zone 4)** – The District's foodstores also have a strong market share in Zone 4 (87.6%). Crowborough Town Centre has a market share of 66.3%, which is accounted for by Morrisons at Pine Grove (34.9%), Waitrose at Croft Road (23.5%) and Lidl at Beacon Road (7.9%). The out-of-centre Tesco at Sybron Way is also achieving a market share of 20.6%. The main 'leakage' is to Tunbridge Wells (8.3%), and specifically to Sainsbury's at Linden Park Road.
- **Is there anything we can add about Polegate?**

4.15 The survey results confirm that the District Centres and smaller local centres, village and parades in Wealden have a limited market share for main food shopping. This reflects the fact that these smaller centres predominantly serve the more frequent shopping and service needs of their local catchment populations, and their retail offer is predominantly anchored by smaller convenience stores.

Top Up Food Shopping

4.16 Table 4 (**Appendix 4**) sets out where households in the study area mainly carry out their top-up food purchases based on the survey-derived market shares. It shows that the District's food and convenience stores are retaining some 58.9% of trips and expenditure within the total study area, increasing to 67.7% within the broadly defined local authority area.

[35] For the purpose of our assessment we have assumed the defined Primary Shopping Area (PSA) represents the Town Centre.

4.17 Across the study area the District's stores and shops are achieving a relatively strong 'retention' level, ranging from 76.7% in Zone 1, to 96.6% in Zone 2. This reflects the fact that household's mainly carry out their top-up food shopping purchases at their local stores; generally within easy walking or driving distance from their homes or place of work.

4.18 The survey results confirm that to varying degrees the District's main centre have important roles catering for the day-to-day 'top-up' food shopping needs of their local catchment and working populations. For example, Hailsham (53.2%), Heathfield (66.8%), Uckfield (57.9%) and Crowborough (38.9%) Town Centres are all achieving relatively strong market shares within their respective CCZs. The out-of-centre Waitrose in Heathfield (14.6%) and Tesco and Marks and Spencer Simply Food stores in Crowborough (25.4%) are also popular.

4.19 The important role of the District Centres in Wealden for top-up food shopping is also illustrated by the fact that Polegate (17.6%) and Forest Row (28.8%) are achieving relatively strong market shares in their respective CCZs. Wadhurst has a more limited market share (6.5%) within its CCZ (Zone 9), although this is supplemented by the market share (5%) of the Costcutter/Co-Op at Sparrows Green Road which is defined as being out-of-centre.

4.20 The District's smaller Local Centres, Villages and Shopping Parades are also achieving a good market share within their respective zones; ranging from 11.8% in Zone 2 to 27.5% in Zone 3.

All Food Shopping

4.21 Table 1 (**Appendix 4**) summarises the overall survey-derived market shares for all food (main and top-up) purchases.

4.22 The survey results confirm that the District's main food and convenience stores are achieving a relatively strong 'retention' of shopping trips and expenditure within the Heathfield (Zone 2), Uckfield (Zone 3) and Crowborough (Zone 4) CCZs of 77.1%, 83.1% and 88.8% respectively.

4.23 The 'retention' level in Hailsham's CCZ (Zone 1) is lower at 57.7%. This mainly reflects the draw of foodstores in Eastbourne (21.5%), and principally Asda in The Crumble, Tesco Extra at Lottbridge Drove and Sainsbury's at Broadwater Way.

Comparison Goods- Market Share Analysis

4.24 Comparison goods[36] are generally defined as items purchased less frequently and include clothing, footwear, household and recreational goods (also see Glossary of Terms). The household survey comprised questions on the following main non-food expenditure categories, as defined by Experian:

[36] Please note that comparison goods and non-food shopping have the same meanings.

Table 4.2 Household Survey – Comparison Goods Categories and Questions

Question	Experian Expenditure Goods Category	Examples of Products
10	clothing and footwear	
12	recording media for pictures and sound	includes records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.
13	audio visual, photographic and computer items	includes stereos, radios, TVs, software, cameras, kindles, iPads, telephones, etc.
14	all other electrical goods, including domestic electrical appliances	includes irons, kettles, fans, coffee makers, food mixers), white goods (fridges, freezers, dishwashers) and smaller etc
15	shopping for books and stationary and drawing materials	includes dictionaries, encyclopaedias, text books, guidebooks, musical scores, writing pads, envelopes, pens, diaries, etc.
16	games & toys; pets and pet products	includes hobby items; sport, camping goods and bicycles; and musical instruments
17	furniture, carpets, other floor coverings and household textiles'	includes beds, sofas, tables, etc.
18	DIY goods, decorating supplies and garden products	includes drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs, etc.
19	Personal care	*includes* electric and non-electrical appliances, cosmetics, perfume, toothpaste, aftershave, sun tan lotions, etc
20	Medical goods, other pharmaceutical products and therapeutic appliances / equipment	*includes* medical drugs, spectacles, contact lenses, hearing aids, wheelchairs, etc.
21	All other goods	*includes* jewellery & watches; glassware, china, tableware and household utensils; and other personal effects'

4.25 Table 1 (**Appendix 5)** sets out the detailed market share analysis for all comparison goods shopping across the wider study area (Zones 1-9) and broadly defined Wealden District area (Zones 1-6 and 8). The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories analysed by the household survey (Tables 2-12)[37]. This helps to ensure that the resultant composite shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

4.26 As for the analysis of convenience goods, the market shares include expenditure on Special Forms of Trading (SFT), but exclude all 'null' responses.

4.27 The headline findings of the market share analysis are briefly described below.

Online Shopping

4.28 Table 1 (Appendix 5) shows that online shopping accounts for 19.2% of all comparison goods purchases across the study area and 19.1% within the defined local authority area. This market share is higher than the national average of 16.5% identified by Experian's latest *Retail Planning Briefing Note 13* (see Section 3). The market shares range from a low of 13.8% in Zone 5 to 21.8% in Zone 3.

4.29 SFT, and principally internet shopping is achieving higher market shares for certain categories of comparison good expenditure in line with national trends. For example, within Wealden District (Zones 1-6

[37] The total market share analysis for all comparison goods has been derived by applying the market shares for the different categories of comparison goods to the available spend by goods type within each survey zone. This is an accepted approach as it provides a more accurate assessment of the distribution and weight of spend by respondents across each zone. The more detailed expenditure category approach means that the resultant market shares for centres and stores are not skewed by any one comparison goods expenditure category. As a result, the analysis provides a more robust picture of overall shopping patterns and market shares for comparison goods.

and 8) SFT/online shopping is achieving a high market share of all shopping purchases across the following categories:

- recording media (54.8%);
- audio-visual (33.9%);
- books and stationery (33.7%);
- toys, games, bikes, pet products, etc. (29.3%).
- other domestic electrical goods (24.9%); and
- clothing and footwear (18.5%).

4.30 In contrast, SFT's market share of other non-food categories is more limited; including for DIY (2.7%); medical goods (1.8%); personal care products (8.2%); and furniture and carpets (11.8%). However, this does not necessarily mean that these specific sectors will be 'immune' from the growth in internet shopping over the medium to long term.

All Comparison Goods

4.31 Table 1 (**Appendix 5**) shows that all the District's centres and stores are achieving a 'retention level' of 18.4% of all comparison goods purchases within the study area and 19.8% in the broadly defined local authority area. Within the District area, the survey-derived market shares identify that:

- Hailsham, Uckfield, Crowborough and Heathfield Town Centres are achieving market shares of 5.6%, 5%, 4% and 1.8% respectively.
- Wealden's other smaller District, Local and Village Centres are achieving a limited combined market share of below 2%.
- The District's out-of-centre non-food stores have a combined market share of 1.4%, which reflects the limited provision in Wealden.
- The main Town Centres are achieving higher market shares in their Core Catchment Zones (CCZs), ranging from 25.3% for Heathfield Town Centre (Zone 2), up to 36.6% for Uckfield Town Centre (Zone 3).

4.32 Of the 61.2% of comparison goods expenditure that is 'leaking' to other centres and stores outside the District area, the most popular shopping destinations are Royal Tunbridge Wells (19.9%), Eastbourne (19.2%) and East Grinstead (6.6%)[38]. This reflects the greater scale, quality and choice of shops and services in these larger neighbouring centres.

4.33 Tables 2-12 (**Appendix 5**) set out the finer grain market share analysis for the different comparison goods categories. Some of the key trends for fashion and 'bulky goods' shopping are briefly summarised below:

[38] These market shares include the in-centre and out-of-centre stores and shopping destinations.

- **Clothing and footwear** – The District is achieving a limited market share of fashion purchases within both the wider study area (4.2%) and broadly defined local authority area (4.6%). Hailsham (5.3%), Heathfield (1.4%), Uckfield (8.1%) and Crowborough (6.8%) Town Centres are achieving relatively low market shares within their respective CCZs. This reflects the limited scale, quality and choice of clothing and shoe shops in these centres compared with larger competing centres in neighbouring areas and beyond. The survey results indicate that the main 'leakage' of shopping trips and expenditure is to Royal Tunbridge Wells (27%), Eastbourne (25.6%), Brighton (7.1%), Crawley (4.7%) and East Grinstead (3.6%).
- **DIY and gardening products** - The District is achieving a higher market share in this category within both the wider study area (29.3%) and the local authority area (31.2%). The retention levels are significantly higher in the CCZs for Hailsham (Zone 1 - 43.2%), Heathfield (Zone 2 - 46.4%) and Uckfield (Zone 3 – 78.6%), although it is lower for Crowborough (Zone 4 – 23.1%). Within their respective CCZs, Uckfield Town Centre is achieving the strongest market share (44.8%), followed by Heathfield (19%), Crowborough (18.8%) and Hailsham (14.5%) Town Centres. In terms of the District's out-of-centre provision, Hailsham Retail Park is achieving a good market share in Zones 1 (26.3%) and 2 (14.5%), and the 'bulky' goods units at the Bellbrook Industrial Estate in Uckfield are also achieving a combined market share of 30.7% in Zone 3. Notwithstanding this, there is a significant leakage of trips and expenditure to centres and stores outside the District; principally Eastbourne in Zones 1 (36.2%) and 2 (38.1%), and Tunbridge Wells in Zone 4 (73.1%).
- **Furniture, floor coverings and household textiles** - The District is achieving a limited market share of these types of goods within both the wider study area (19.3%) and broadly defined local authority area (20.9%). Uckfield Town Centre is achieving the highest market share in its CCZ (34%), followed by Hailsham (20.2%), Heathfield (15.9%) and Crowborough (6.8%) Town Centres. The market share for out-of-centre shopping is low, which reflects the limited scale and choice of retail warehousing in the District compared with larger competing centres in neighbouring areas and beyond. The survey results indicate that the main 'leakage' of shopping trips and expenditure is to Royal Tunbridge Wells in Zones 2 (30.8%), 4 (69%) and 5 (77.8%), and to Eastbourne in Zones 1 (34.2%), 3 (23.1%) and 8 (64.9%).

Summary

4.34 In summary, the survey-derived market shares show that the retention of all food shopping trips and expenditure in the Heathfield (Zone 2), Uckfield (Zone 3) and Crowborough (Zone 4) CCZs is strong, at between 77.1% and 88.8%. This is an indication that these towns have a relatively good provision of in-centre and out-of-centre superstores, supermarkets and smaller convenience stores that are generally meeting the main and top-up food shopping needs of their catchment populations.

4.35 Notwithstanding the apparent good choice of superstores in Hailsham (i.e. Tesco, Waitrose and Asda), the overall retention level in its CCZ (Zone 1 – 57.7%) is lower than for the District's other main town centres. This is explained by the strong draw of superstores in and around Eastbourne, which are achieving a combined market share of 21.5% within Zone 1. This 'leakage' may point to deficiencies in Hailsham's current foodstore provision.

4.36 In terms of comparison goods shopping, it is clear that online retailing accounts for a high proportion of purchases on specific categories; including books, recording media, games, toys and electrical products. This market share is forecast to increase over the plan period in line with national trends and represents a threat to existing centres and shopping destinations.

4.37 It is also apparent that the District's Town Centre do not have the critical mass of retailing in terms of the scale, quality and choice of shops to compete with the larger competing centres and shopping destinations outside the District; principally Eastbourne, Royal Tunbridge Wells and East Grinstead.

4.38 The challenge for Wealden District Council is how to maintain and strengthen the market shares of its main Town Centres and smaller centres in the face of the growing competition from larger neighbouring centres, as well as the growth of internet shopping. We explore these challenges in more detail in this Stage 1 report as part of the health check assessments.

5 SUB-REGIONAL CONTEXT

5.1 The policy review (Section 2) and market share analysis (Section 4) has confirmed that although convenience expenditure is largely retained within Wealden District, a significant proportion of the District's residents look to the high order centres in neighbouring local authority areas to meet their wide-ranging comparison goods shopping needs, particularly for fashion-related purchases.

5.2 The survey results show that Eastbourne is the main shopping destination for residents living to the south of Wealden District, whereas Royal Tunbridge Wells is generally the preferred shopping destination for those living in the north of the District. To varying degrees East Grinstead, Brighton, Lewes and Haywards Heath are also drawing shoppers and comparison goods expenditure from Wealden District; albeit they have more limited market shares across the defined study area.

5.3 Before setting out the findings of the updated health check assessments for the District's main centres in Sections 6-12, this section briefly provides an overview of the relative ranking, scale, quality and wide-ranging choice of shops, services and facilities in these major centres. This will provide the context for the need assessment to be carried out as part of the Stage 2 report.

Town Centre Ranking

5.4 Javelin's 'Venuescore' index ranks the performance of all major retail centres in the UK, and as such offers a useful benchmark with which to compare the performance of a number of centres. Venuescore includes all major city, town and district centres in the UK, as well as other significant destinations such as retail parks and outlet centres. The performance of the centres is influenced by a number of factors, including the presence of multiple retailers. The table below shows the performance of the District's main town centres (where a ranking exists) and how they compare with the higher order centres.

Table 5.1 Changes in (Venuescore) Retail Rankings

	Location Grade	2007 Rank	2015 Rank	Change in Rank
Brighton	Major City	7	6	+1
Tunbridge Wells	Major Regional	55	52	+3
Crawley	Regional	55	87	-32
Eastbourne	Regional	126	117	+9
Haywards Heath	Sub Regional	374	324	+50
East Grinstead	Sub Regional	341	350	-9
Lewes	Major District	517	569	-52
Hailsham	District	886	768	+118
Uckfield	District	740	796	-56
Crowborough	District	990	989	+1

Notes: Heathfield, Wadhurst, Forest Row and Wealden District's other centres are not covered by the Venuescore Rankings as they are too small in terms of their number of shops and multiple representation.

5.5 The table shows that the larger centres in the sub-region are all ranked significantly higher than the District's main centres. This reflects the relative scale, diversity and choice of their retail offers. It means that their catchments and trade draw extend over a wide area. This is confirmed by the results of the household

survey, which shows the influence of a number of these major centres on shopping patterns in Wealden District.

5.6 Hailsham, Uckfield and Crowborough are all classified as smaller 'District' centres in the Venuescore national ranking and have more local catchments. Hailsham has experienced a significant improvement in its national ranking from 886th in 2007 to 768th in 2015, which we believe is mainly explained by the opening of the new Tesco store on North Street. In contrast, Uckfield has fallen 56 places in the rankings since 2007, to 796th. This probably reflects the lack of significant new investment and development in the town centre over this period. The fall in Uckfield's ranking is also due to the impact of the economic downturn on retail representation in many town centres and the loss of a number of major multiples from the UK's high streets including, for example, Woolworths. The table shows that Crowborough's ranking has not changed significantly since 2007, and it is currently placed 989th.

5.7 The following provides a brief overview of the scale and quality of the retail offer in the main town centres outside Wealden District based on the most recent research and evidence prepared for these centres for their respective local planning authorities.

Royal Tunbridge Wells

5.8 Royal Tunbridge Wells is the main centre in the Borough. The *2014 Retail and Leisure Update* prepared for the Council identified that the centre has an above average provision of comparison goods retailing, and a diverse mix of multiple and independent shops. There is a particularly good provision of clothing and footwear retailers.

5.9 Key (non-food) retailers in the town that help to anchor its overall offer and attract shoppers from within and outside the Borough include the Fenwick department store and Marks and Spencer, along with Next, Gap and River Island (BHS has recently gone out of business and closed its store in the town centre). The majority of the town's multiple retailers are concentrated in the Royal Victoria Place shopping centre, and along Calverley Road. The higher end retailers and restaurants are mainly located along Mount Pleasant Road, including Phase Eight, Jigsaw, Strada and Carluccio's. Running south from the train station, the High Street is slightly divorced from the prime retail pitch, but also comprises a number of high end retailers, including Cath Kidson, Joules and Farrow & Ball. There is also a range of quality independent stores in this part of the town centre that adds to its overall attraction. The town also has a good choice of national and independent food and convenience retailers. This has been further strengthened by the re-opening of the Morrisons store.

5.10 Vacancy levels in the town centre were below the national average in 2013 and are principally located in secondary shopping areas. However the Council's data suggests that vacancies had increased from 41 in 2009 to 74 in 2013.

5.11 There are also a number of major shopping destinations located outside the town centre, principally focussed on the North Farm/Longfield Road area located some 4km to the north west of the town. The Longfield Road Retail Park, for example, has a John Lewis at Home store and Fountains Retail Park also has a Marks & Spencer Food & Home store. Both these stores have opened within the last 5 years and the

2014 Study refers to the fact that they have drawn shoppers and expenditure from the town centre. Notwithstanding this the 2014 Study identified that Royal Tunbridge Wells achieved a comparison goods turnover of £365.2m (excluding visitor inflow), based on the results of the household survey.

5.12 In conclusion the 2014 Study identified that the town centre "*remains unquestionably the dominant retailing and leisure destination, but it will need to reassert its position through introducing new, modern retail property stock, and upgrading existing stock, as well as maintaining its current diverse retail offer, over the course of the Plan period"* (para 11.2.5). The study forecasts a total Borough-wide capacity for 23,600 sqm net of new comparison goods floorspace up to 2026, of which the majority is for Royal Tunbridge Wells (22,600 sqm net). The town centre's capacity increases to 30,900 sqm net based on an increase in its retention level from 47% to 50% across the defined study area. The need for new convenience goods floorspace is forecast to be 2,300 sqm net by 2026, with 1,700 sqm net of this allocated to the town centre.

5.13 To help meet the identified need for new comparison goods retailing and other town centre uses (including a cinema in the Town Centre) over the Plan period, the local planning authority has identified a number of opportunity sites within Royal Tunbridge Wells Town Centre. The Council has also recently commissioned an update of the *2014 Retail and Leisure Study* to help inform its preparation of a new Local Plan.

Eastbourne Town Centre

5.14 Eastbourne Town Centre provides a focus for retail, leisure and tourism, serving both the Borough's population and a wider catchment population; including residents in the South Wealden area.

5.15 The Town Centre is attractive and compact. The two main areas for activity are the Seafront and Terminus Road. The Seafront is a key tourist attraction and an important economic driver. In addition the town's theatres and award-winning Towner gallery contribute to the overall mix of attractions. Terminus Road is an important spine running broadly east to west through the Town Centre, connecting the railway station with the Seafront via the pedestrianised Sussex Gardens. The Arndale shopping centre is located here and represents the town's prime retail pitch, with the highest concentration of multiple retailers. The Town Centre has a good mix of national and independent retailers. The extensive secondary shopping areas, particularly those around Grove Road and South Street, known as 'Little Chelsea', give Eastbourne a special quality of shopping experience.

5.16 The *Eastbourne Shopping Assessment* (May 2010), underpinned by a household survey conducted in 2007, identified that the Town Centre is the main focus for comparison goods shopping serving the Borough's residents and a wider catchment population. Food and convenience goods shopping in Eastbourne is dominated by the large freestanding superstores; namely Asda at the Crumbles, Sainsbury at Hampden Park and Tesco/Morrisons at Lottbridge Drove. The study found that there were some 170 multiple retailers in the town centre in 2010, which was significantly below the provision in Brighton (445) and Tunbridge Wells (283). The study also identified that there were some 61 vacant units within the designated primary and secondary shopping frontages in 2010, and the vacancy level at the time (9.8%) was below the national average figure.

5.17 The main out-of-centre shopping locations in Eastbourne are concentrated along Lottbridge Road. These include Admiral Retail Park, located adjacent to the Tesco Extra store, which has Argos Extra, Homebase, Pets at Home and a Wickes DIY store amongst its tenants; and Hampden Park Retail Park which is anchored by B&Q, Mothercare, Maplin, Halfords and Mothercare. Other shopping locations include Crumbles Retail Park, off Pevensey Bay Road, which is anchored by Asda, and comprises a number of bulky and non-bulky goods retailers amongst it tenant mix (such as Next, Boots, Brantano, JJB Sports, TK Maxx, Boots and Sports Direct), as well as a Cineworld Multiplex and Fitness First Health Club.

5.18 In terms of the capacity for new retail floorspace, the 2010 Study forecast a need for over 12,000 sqm net of new comparison goods floorspace in Eastbourne Town Centre between 2007 and 2026, and 155 sqm net of convenience goods floorspace, after allowing for all known commitments.

5.19 Following the preparation of the *Eastbourne Shopping Assessment* (May 2010), the *Eastbourne Area Action Plan* (AAP) was published by the Council in January 2012 to help shape development within the town up to 2027. The AAP was prepared in parallel with the Council's Core Strategy (Policy D4) and seeks to retain and strengthen Eastbourne's retail offer so that it can compete effectively with other nearby shopping destinations, including Brighton and Hove and Royal Tunbridge Wells. In response to the retail need identified by the *Eastbourne Shopping Assessment*, the AAP identifies five Development Opportunity Sites in the Town Centre, including land at the junction of Terminus Road/Ashford Road (Site One) and land adjoining the railway station and Enterprise Centre (Site Two).

5.20 Subsequent to this permission has recently been confirmed for an £85 million plan to extend and transform Eastbourne's Arndale Centre by the owners Performance Retail Limited Partnership (PRLP)[39]. The new scheme will have a total floorspace of approximately 15,800 sqm (170,000 sq ft) and will involve the demolition of buildings west of the centre along Terminus Road. It will accommodate an additional 22 new retail units, approximately 300 extra car parking spaces, seven restaurants and a nine-screen cinema. To date Cineworld, Next, H&M, Nando's, Carluccio's, Wagamama, Byron, Chiquito and Frankie & Benny's have all signed up to take space in the new scheme, which is scheduled to open in 2018/19.

Lewes Town Centre

5.21 Lewes is the largest centre and the principal shopping centre in the District. It is an historic and attractive shopping environment focused around the High Street, Cliffe High Street and the Friars/Eastgate Shopping Centre. A large proportion of the town centre's buildings are Listed and the centre is covered by a Conservation Area, which effectively limits the potential for new development. The centre's historic attractions (including the Castle and the medieval priory), the Harveys brewery complex, and the setting within the South Downs National Park, means that the town centre also benefits from significant visitor and tourist spend and this is reflected by its retail, food and beverage offer.

5.22 In shopping terms, the retail offer is characterised by higher-end independent retailers. National multiples in the town include Waitrose, WH Smith, Boots and Superdrug, along with a number of high end retailers, such as Crew Clothing and East. Although there is a reasonable level of representation from national retailers in

[39] Following the grant of planning permission in 2014, the Secretary of State for Communities and Local Government approved the Compulsory Purchase Order in March 2016 for land needed in Terminus Road and Sutton Road to enable the extension to go ahead. Legal & General have a majority share in PRLP.

Lewes, these multiples are typically located in smaller units, because of the historic and constrained nature of the town, and do not therefore offer the full range of goods found in their larger store formats in other centres and out-of-centre shopping locations. This is illustrated by the fact that most of the centre's multiples are located in the more modern Friars shopping scheme at the foot of the High Street. The centre has a more limited mainstream fashion offer, and as a result there is a 'leakage' of shopping trips to Brighton and Eastbourne. Outside the town centre the main provision includes a Tesco at Brooks Road and an Aldi store which opened adjacent to Tesco in 2011.

5.23 The most recent *Lewes District and Town Centres Study* (May 2012) identified that the town centre achieved a turnover of approximately £50m in 2012. Its vacancy level (5.2%) was well below the national average (14%) in 2012, and most of the vacant units were in secondary shopping streets. The study identified limited capacity for new convenience (240 sqm net) and comparison (3,488 sqm net) goods floorspace in the town centre up to 2030. The study advised that although there was no immediate requirement to make site allocations, there was a qualitative need to provide a more diverse retail offer to arrest some of the shopping outflow and to provide modern floorspace to match the demands of national multiple retailers. The study concluded that the main development opportunities to meet the identified need over the Plan period are focussed on the Eastgate area and the dated bus station, subject to the relocation of the existing bus station to a suitable and accessible site.

Brighton City Centre

5.24 Brighton is a primary sub-regional centre and a major shopping destination in terms of the scale, quality and choice of its retail and leisure offer. The City Centre draws from a wide catchment and is drawing some shoppers from Wealden District, principally for fashion-led comparison goods shopping.

5.25 The main shopping and multiple offer is focussed around Churchill Square Shopping Centre (anchored by Debenhams), North Street and Western Road. In addition, the Lanes and North Laine act as specialist, independent comparison and service retail destinations within the centre. Jubilee Street (North Laine) has benefitted from new investment over recent years, providing new shops and restaurants.

5.26 The *Brighton and Hove Retail Study* (BHRS) published in September 2011 updated the Council's earlier 2006 study. Based on information provided by the local planning authority it identified that Brighton had some 1,205 units in 2011, trading from a total retail floorspace of 165,908 sqm gross. Comparison retail units accounted for approximately half of all the retail units in the centre and provision was above the national average identified by Experian Goad. Brighton's vacancy rate in 2011 (6.8%) was also below the national average of figure of 12.9%. Overall the study concluded that the centre was performing relatively well and the distinctive nature of the different quarters of the centre provided a wide offer for both residents and visitors to the area. However, it also concluded that it was difficult to navigate between the different quarters, partly due to poor signage, traffic flows, and congested pavements throughout the centre.

5.27 In terms of the capacity for new retail floorspace, the 2011 BHRS identified no capacity for new convenience goods up to 2021, with capacity increasing to 2,967 sqm net by 2030. For comparison goods the study forecast capacity for 24,709 sqm net by 2030 assuming constant market shares, increasing to 58,313 sqm net if Brighton is able to increase its retention level from 60.9% to 70% within its defined study area.

5.28 Subsequent to this Brighton City Centre has benefitted from new investment and development. This includes Churchill Square Shopping Centre, which has undergone phased improvements to it shop frontages and retail offer, including the creation of a new 32,000 sqft unit for Topshop and Topman. The Open Market also reopened in July 2014, with 45 new tenants offering fresh, locally sourced food and goods, as well as a variety of arts, crafts, services and garden goods. Brighton City Council has also recently announced it is to sell the 1970s Brighton Centre to the owners of the Churchill Square Shopping Centre to help fund the building of a 10,000-seat arena and conference centre on the Black Rock site, referred to as Waterfront East. The existing conference centre will be demolished to make way for an extension to the shopping centre and a residential tower block. The proposed retail scheme would help improve the seafront and public spaces around the current Brighton Centre and West Street, as well as providing better links between the city and the seafront. Designs for both sites are to be worked on by both Standard Life and the City Council, with a planning application scheduled for 2018.

Haywards Heath

5.29 Haywards Heath is located in Mid Sussex and is significantly smaller than both Brighton and Eastbourne; with a total estimated 221 units trading from a gross floorspace of 33,807 sqm[40]. The most recent *Mid Sussex Retail Study Update* (2014) identified that the town's primary shopping frontage is focussed on South Road, which serves as the main shopping street in the town. The centre's retail offer is anchored by the Orchards Shopping Centre off South Road, which accommodates a number of major national multiples (including Marks & Spencer and Next). There are secondary shopping areas to the south of South Road on Sussex Road and also to the north along the Broadway.

5.30 There has been limited new investment in the town's retail offer for a number of years, but the planned redevelopment of the railway station to include a new Waitrose store (4,122 sqm gross) will significantly strengthen the town's retail offer, as well as providing more car parking spaces to the benefit of the town centre as a whole. Vacancy levels in the centre stood at 8.1% in 2014, which was below the (Experian Goad) national average figures of 11.5%.

5.31 In terms of the capacity for new retail floorspace, the 2014 study forecast the potential for 2,475 sqm net of new convenience goods floorspace and 13,689 sqm net of comparison goods retailing for the District up to 2031. In Haywards Heath there was no capacity for new convenience goods floorspace, after taking account of the Waitrose commitment, and capacity for 3,558 sqm net of new comparison goods retailing.

5.32 We understand that the Council has entered into discussions recently with the leaseholders of The Orchards to discuss plans for improvement to the scale and quality of this important shopping location in the heart of the town centre. The emerging proposals for The Orchards and other potential development opportunity sites in the town centre will help to meet the need for new and improved retail and commercial leisure floorspace in Haywards Heath over the plan period.

[40] Experian Goad Town Centre Report (January 2014) sourced from the Mid Sussex Retail Study Update 2014.

East Grinstead

5.33 East Grinstead is located in the north of Mid Sussex District and the *2014 Retail Study Update* identified that it is the largest centre in the District with some 222 units trading from a total floorspace of 38,722 sqm gross[41]. Its main shopping, leisure and service provision is focused around its historic core, although this also places a constraint on new development.

5.34 The town's Primary Shopping Frontages run along London Road and also include Queens Walk Shopping Precinct and the upper section of Railway Approach (which links to the northern end of London Road). Secondary Frontages comprise the High Street and the sections of West Street and Ship Street which approach the roundabout with High Street. The *2014 Retail Study* identified that current vacancy levels (7.7%) in the centre were below the national average (11.5%) at the time. In terms of the capacity for new retail floorspace, the study forecast the need for 1,538 sqm net of new convenience goods floorspace by 2031 and 4,463 sqm net of new comparison goods retailing.

5.35 The main investment proposals for the town centre are focussed on Queens Walk and Railway Approach. Plans are currently being progressed in the town centre by Evolve Estates seeking the redevelopment of the current Martell's store on the northern side of Queens Walk, along with 1-4 Normans Gardens and 26-38a Queens Road, to provide 1,624sqm of retail space and 129 residential apartments. This followed the failure of an earlier proposal in July 2014 to regenerate the area after Martell's failed to reach an agreement with Asda to anchor the site. Together with the proposed redevelopment of Railway Approach, the 2014 Study concluded that the emerging schemes should be capable of meeting all the identified need for new retail floorspace in the town centre over the plan period.

Summary

5.36 In summary, the higher order centres located outside Wealden District exert a strong influence on shopping patterns and expenditure flows within the District. The survey results have confirmed that a significant proportion of the District's residents choose to shop outside of the District in these larger centres to meet their main comparison goods and fashion shopping needs. All of the higher order centres identified have plans to strengthen the scale and/or quality of their retail and leisure offer, and will therefore continue to compete with the District's main centres for shoppers and retail expenditure and market share.

[41] Experian Goad Town Centre Report (May 2013), sourced from *Mid Sussex Retail Study Update 2014*.

6 HAILSHAM TOWN CENTRE: HEALTH CHECK

6.1 Sections 6-12 set out the key findings of the health check assessments for the District's main centres (namely Hailsham, Uckfield, Crowborough, Heathfield, Polegate, Forest Row and Wadhurst) carried out in accordance with the advice set out in the *Planning Practice Guidance* (PPG).

6.2 The health checks draw on a wide-ranging research and evidence, and have been supplemented by site visits and audits of each centre; including 'guided' tours of Hailsham, Uckfield and Crowborough by key town centre stakeholders. We have also carried out wider consultations with other key stakeholders (including the Hailsham AAP Steering Group) to help inform the preparation of the health checks and wider study. The health check methodology and approach is described in more detail in **Appendix 6**.

Changes in District-wide Town Centre Uses

6.3 Before we assess the health of the main town centres, the table below summarises the net the loss/gain of floorspace in the District's main town centre uses (in this case Class A1-A5, D1 and D2 uses) based on information provided by the Council.

Table 6.1 The net the loss and gain of town centre uses between 2007 and 2015

Year	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	Sub-Total 2007-2015	Commitments at April 2015	Under Construction at April 2015	TOTAL
Change in Floorspace (sqm)	*+346*	*+268*	*+1391*	*+844*	*+474*	*-111*	*+550*	*+322*	***+4084***	*-194*	*+2508*	*+6398*

6.4 The data shows a general trend for year-on-year growth in town centre floorspace since 2007/08 with a net increase of +4,084 sqm up to 2015. However, as the table shows, this growth is characterised by clear peaks and troughs; with strong growth in 2009/10 of +1,391 sqm and a fall in town centre floorspace in 2012/13 of -111. Looking ahead to the year 2015-16 although existing commitments will result in a slight loss of town centre use floorspace of -194 sqm this is more than made up for by sites under construction which will deliver a net increase of 2,508 sqm. Overall the Council's data shows a net gain in (town centre uses) floorspace since 2007 across the District of +6,398 sqm, which is a positive indicator of the relative health of the District's main centres in terms of new investment and market demand. However it should be noted that some of this new floorspace will have been provided in out of centre locations

Context

6.5 Hailsham is a traditional market town dating back to medieval times, located some 10km north of Eastbourne on the A22. It is designated in the Core Strategy as a '*District Centre'* sitting at the top of the Wealden's Settlement Hierarchy alongside Uckfield and Crowborough. The emerging Wealden Local Plan *"Issues, Options and Recommendations*" (October 2015) defines Hailsham as a '*Market Town Centre'* in the Town and Village Centre Hierarchy.

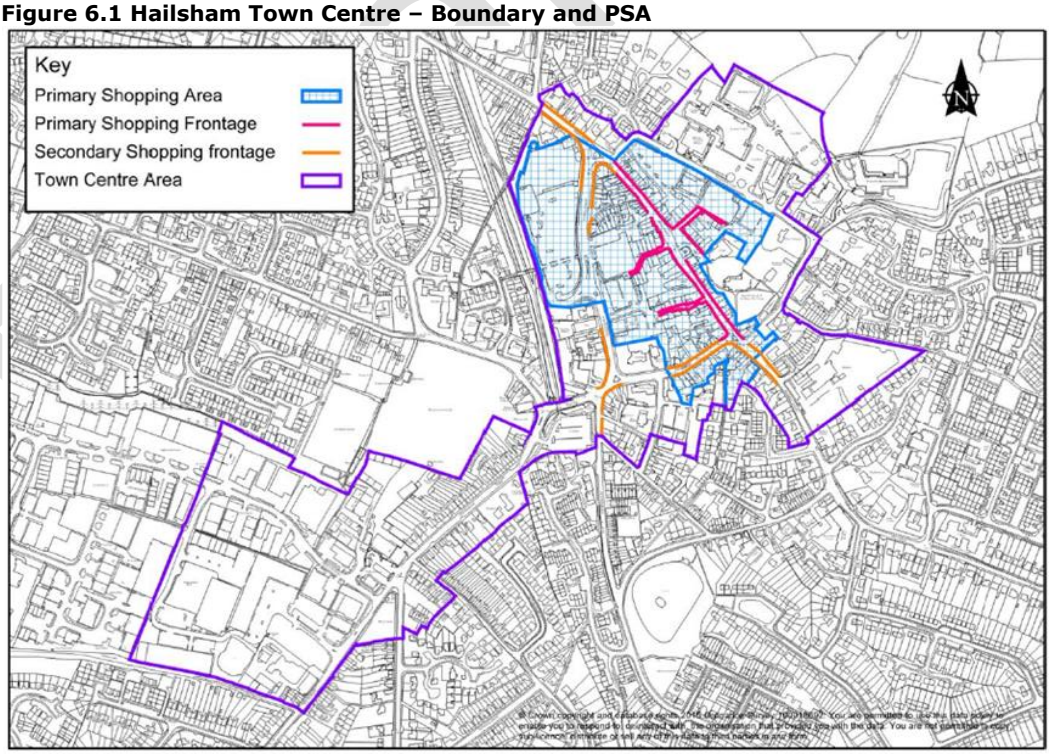
6.6 Hailsham Town Centre's main retail and service offer is focused around the High Street and George Street. The centre has two purpose-built shopping centres, namely Vicarage Fields (anchored by Waitrose) and The Quintins (anchored by Asda). These shopping centres are located opposite each other within the Town's Primary Shopping Area (PSA), separated by the High Street. This area forms the shopping "*heart of the centre"*, albeit that the public ream in this area would benefit from investment and improvement to create an attractive and active public square. Other main shopping streets include:

- St Mary's Walk - functions principally as a secondary shopping street comprising mainly independent retailers.
- North Street - the main vehicular route through the Town Centre, and provides access to the Tesco and Asda supermarkets.
- Vicarage Lane – comprises the Hailsham Leisure Centre and is connected to the High Street via a pedestrian path along the Waitrose Supermarket.

6.7 As described in Section 2, the emerging Wealden Local Plan identifies the potential for significant new housing development to the south of Wealden District, in and around Hailsham (Zone 1 of the defined household survey study area). This will result in a significant increase in Hailsham's population and inevitably increase the demand for new retail, leisure, service, business and community facilities in the town centre as a priority, as well as placing pressures on the town's existing infrastructure

6.8 The Wealden Local Plan "*Issues, Options and Recommendations*" (WLP IOR October 2015) consultation document defines the preferred option for testing for the future Hailsham Town Centre Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below).

Figure 6.1 Hailsham Town Centre – Boundary and PSA



Source: Extract from Wealden Local Plan "Issues, Options and Recommendations" (October 2015), Map 29.

6.9 We review and comment on the proposed boundary definitions and frontages in the Stage 3 Report, drawing on the key findings of this Stage 1 Report and the Stage 2 (*Need and Demand Assessment*) Report.

Retail Composition

6.10 Based on the Council's town centre audit undertaken in May 2015, the composition of the centre's retail and service offer is summarised in the table below.

Table 6.1 Retail and Service Composition: number and type of units at ground floor level.[42]

	2008 [GOAD]		2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	No. Outlets	%	%
Convenience	10	7%	10	5.46%	8.51%
Comparison	51	34%	51	27.87%	31.97%
Services	76	50%	100	54.64%	47.62%
Vacant	13	9%	22	11.96	11.35%
Total	150	100%	183	100%	100%

6.11 As the table shows, there are 183 outlets in Hailsham, which is virtually the same as recorded for Uckfield (181) and higher than for Crowborough (122).

Convenience Shopping

6.12 Table 6.1 shows that the number of convenience goods outlets in the town has not changed between 2008 and 2015. Current provision represents 5.46% of total outlets in the town centre, which is below the national average of 8.51%.

6.13 Notwithstanding its under-provision of outlets the centre's total convenience floorspace will be higher than the national average due the presence of three large 'anchor' superstores in Hailsham; namely Tesco[43], Waitrose and Asda. These larger foodstores also help to generate linked trips and expenditure for other shops and services in the town. The town's convenience offer is also supplemented by Iceland (frozen food), two convenience stores (including Costcutter), a newsagent (Pipers Newsagent), a butcher (the Sussex Larder) and two health foods stores (Holland and Barratt, and Hailsham Healthfoods).

6.14 The Household Survey results show that in Hailsham's Core Catchment Zone (CCZ1) only half of the population uses Hailsham for convenience shopping[44]. This appears low when compared with the 'retention' levels for Uckfield and Crowborough town centres; they respectively retain 67% and 60% of convenience shopping within their CCZs.

6.15 Therefore it would appear that there is scope to improve the existing food and convenience provision in the town centre; either by improving the quality of the existing stores' offer, or by introducing additional floorspace). Given the new housing and population growth identified for Hailsham over the Plan Period,

[42] The 2008 figures are taken from Wealden District Council Interim Shopping Study 2008 (Volume 2) as produced by Chase & Partners LLP, Table 4 (as derived from Goad Centre Report and Chase & Partners' own assessment of the centre). The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. Note that the surveyed areas for 2008 and 2015 may not be identical. The national average is taken from Experian (October 2015).
[43] Tesco was approved in 2006 and has an estimated sales area of 2,487 sqm net with approximately 20% of the floorspace set aside for comparison goods sales.
[44] It is noted that a high proportion of the population Hailsham's CCZ (21.5%) is pulled to Eastbourne

improving the town centre's convenience provision would help to ensure the centre meets the needs of its catchment.

Comparison Shopping

6.16 Between 2008 and 2015 the number of comparison retailers has stayed the same at 51; accounting for 27.86% all the units. This is slightly below the 2015 national average of 31.97%. The category is dominated by independent retailers, the majority of which have a specialist character[45]. The more traditional offer comprises:

- five charity shops (including Age UK);
- four pharmacies/ health and beauty stores (including Boots and Superdrug);
- two florists;
- two shoe shops;
- three furniture shops;
- two cards/gifts stores;
- two jewellers; and
- a stationers/book/variety store (i.e. WH Smith).

6.17 The centre lacks fashion retailers with only one operator noted at the time of our audit (Millies - an independent store). Furthermore, since the Council's 2015 Audit *Store Twenty One* has recently gone into administration and has closed its store in The Quintins. The centre's limited clothing and footwear offer is also reflected by the results of the household survey, which identifies a high 'leakage' of fashion shopping trips and expenditure from the South of the District to Eastbourne, Brighton and other centres.

6.18 Given its relatively limited range and choice of comparison (multiple and independent) offer, it follows that Hailsham is only meeting the very basic and/or specialist needs of its local population. Improving the comparison offer, by for example seeking to attract key high street retailers (especially those in the fashion sector), or building on the quality and the choice of the independent offer, would be key in ensuring that Hailsham remains a vital and viable centre. Given the significant population expansion proposed for Hailsham, opportunities to improve the offer should be actively sought, although this will be subject to market demand.

Service Provision

6.19 Between 2008 and 2015 the number of service-based units increased from 76 to 100. Current provision is equivalent to 54.64% of total units, which is above the national average of 47.62%. It is clear that the town centre has a good number, variety and choice of services that cater for its catchment population. Although service provision in the Town Centre is relatively high, this is a characteristic of market towns. This should not necessarily be a cause for concern, provided that future provision does not increase at the expense of the town's main comparison goods offer. We therefore advise that the Council carefully monitors the mix of service and retail provision.

[45] For example there is a fishing equipment store, a bridal store, 2 baby clothing stores, weapons store (knives, swards, guns, bow etc), a mobility equipment store, a fabric store, a curtain stores, a carpet store, a hardware store.

6.20 The Council's latest audit indicates that there are 34 **retail service** units in the town centre. This represents 18.47% of the total units, which is significantly above the national average figure of 14.30%. This category is dominated by the health and beauty outlets with 15 of all the units occupied by hairdressers, nail bars and beauty salons. There are also:

- two opticians;
- two alternative health clinics (chiropodist/chiropractor/podiatry);
- a post office;
- a dry cleaner;
- two funeral directors;
- a tattoo parlour;
- two taxi shops; and
- four travel agents.

6.21 The town centre also has 23 **financial service**s. This represents 12.56% of total units, which is above the national average of 10.74% in 2015. There are seven banks (HSBC, Halifax, Barclays, Lloyds, Nationwide and Natwest), nine estate agents, three solicitors, and four accountants/finical advisors.

6.22 There are also 44 **leisure services**, which represents 24.04% of the total provision and is above the national average figure of 22.58%. The mix of leisure uses includes:

- 19 cafes and restaurants (including multiple retailers such as Costa Coffee, Prezzo and Subway);
- 11 takeaways;
- two betting shops;
- seven pubs/bars;
- a theatre/cinema;
- a leisure centre;
- bowls club; and
- an art gallery.

6.23 Overall we consider that leisure services are well represented in the town centre but, as stated above, it could benefit from higher quality food and beverage establishments especially in the restaurant sector. This would help to support the daytime economy as well as promote a more attractive and vibrant night time economy.

6.24 In addition to this there may be potential for a new multi-screen cinema in the town centre to help anchor its leisure and evening offer. This will be subject to more detailed economic and market demand assessments, and also the availability of a key site in the town centre to accommodate a cinema-led development.

Vacancies

6.25 The proportion and scale of vacant street level property in a centre, and the length of time properties have been vacant represents one of the key indicators to help inform an assessment of a centre's overall vitality and viability. High vacancy levels in a centre, or a concentration of vacancies in certain areas/ streets, could point to underlying weaknesses in terms of retailer demand and/ or the fact that the vacant units are not 'fit-

for-purpose'. However, vacancies can arise in even the strongest centres as part of the natural "churn" and letting of units, and this indicator must therefore be used and interpreted with care.

6.26 As Table 6.1 shows, the Council's audits have identified an increase in the number of vacant outlets in Hailsham between 2008 and 2015, from 13 to 22. At 2015 this represented 12% of all the units, which was slightly above the 2015 national average of 11.35%.

6.27 Based on our recent audit we found no significant concentrations of vacant units on specific streets to indicate that particular areas of the centre are failing, or are necessarily unattractive as shopping locations. However we did identify that both of the shopping centres (Vicarage Fields and the Quintins) have two vacant units each[46]. In our opinion, both of the shopping centres look "tired" and dated compared to more modern shopping centres, and hence do not offer the right scale and format of units (size and layout) required by modern retailers. This may explain, in part, the reasons for the vacancies in these shopping centres. Additionally, the units in the Quintins have a poor relationship with the High Street, with a number lacking frontages and visibility to the prime shopping street.

Multiple and Independent Retail Representation

6.28 Hailsham Town Centre's retail offer is largely dominated by independent operators. Although the number of multiples has increased from 25 in 2008 to 32 at present, we consider that it has a more limited multiple offer than would be expected for a centre of its size and role in the retail hierarchy; particularly when compared with Uckfield's multiple offer (56). At present the main multiples are listed in the table below.

Table 6.2 Multiple Representation in Hailsham Town Centre

WH Smith	Holland and Barratt
Boots	Prezzo
Tesco	HSBC Bank
Superdrug	Halifax
Subway	Barclays Bank
Waitrose	Lloyds Bank
Thomson	Nationwide Building Society
Costa	NatWest Bank
Johnson's Dry Cleaners	
Asda	
Iceland	

6.29 Given the significant housing and population growth planned for Haisham over the Plan period, we consider that attracting key high street, prominent multiple 'anchor' retailers will be needed in the future to increase the relative attraction of the town centre as a place to shop, work and visit for a range of activities and uses. This will help to 'claw back' some of the leakage of shoppers and spend that is currently flowing to, and will continue to flow to larger competing centres, and principally Eastbourne, without further investment and development in the town centre.

[46] In the Quintins one of the vacant units was previously occupied by Store Twenty One, which has recently gone into administration.

Street Market

6.30 Hailsham *Farmers' and Crafts' Market* takes place on the second Saturday of every month at Hailsham Cattle Market site from 9am - 12.30pm. The market sells a variety of fresh produce (including fresh fruit and vegetables, meat, honey, etc.) and garden plants and has a diverse craft section.

6.31 Hailsham *Street Market* takes place every Saturday at Vicarage Field Hailsham from 9.30am - 3pm (except on the second Saturday of each month, when it is held on the Thursday before). The market can accommodate up to 15 stalls, albeit it the number of stalls will vary from week to week. The market sells local produce including fresh fruit and vegetables, homemade pies and food, jam, smoked fish, crafts and jewellery, garden plants, pet items and accessories. The market has been operating for three years and is quite popular. However, given that it is not covered the appeal of the market is weather dependent, and it can be less popular during the winter months.

6.32 We consider that the presence of the markets is a very positive element and attraction of the town centre. It creates interest and activity, and encourages footfall. These facilities should therefore be protected and encouraged to increase flourish via branding and good marketing.

Market Demand Assessment

6.33 In April 2007 there were five retailers and service businesses seeking representation in Hailsham (namely Blockbuster, Dorothy Perkins, Greggs, Iceland and Rober Dyas); with a total floorspace requirement of 2,071 sqm gross[47]. This was significantly lower than the 17 retailers with requirements for Uckfield at the time; equivalent to 6,772 sqm gross. Of these operators, Iceland has since taken space in Hailsham and Blockbuster has gone out of business.

6.34 According to the latest *Requirement List* and CoStar *Requirement Report* there were seven operators with potential requirements for representation in Hailsham as at July 2016. These are set out in the table below:

Table 6.3 Hailsham Town Centre – Retailer Requirements

Operator	Use Class	Size of Unit (Max)	
		Sqm	Sq ft
Halfords Autocentres	B2	557	6,000
Holland & Barrett	A1	650	7,000
Marstons	A4	836	9,000
Peacocks	A1	929	10,000
Pets at Home	A1	1,393	15,000
Poundworld	A1	1,115	12,000
The Original Factory Shop	A1	1,393	15,000
The Works	A1	232	2,500
TOTAL		7,105	76,500

[47] The Interim Shopping Study (2008), Appendix F "Retailer requirements"

6.35 Together the eight operators are seeking up to 7,105 sqm gross floorspace in Hailsham. The demand for representation in the Town Centre has therefore increased significantly over the last nine years. This indicates that the centre is a desirable location for some multiple retailers.

6.36 It is clear from the list of requirements that some of the retailers (e.g. Peacocks, The Original Factory Shop, The Works and Holland and Barrett) would help to improve the town centre's overall retail offer and should be encouraged to locate in the town centre, whereas others (e.g. Pets at Home) will be seeking larger format units in edge and out of centre locations. Accommodating the needs of these retailers over the short to medium terms will depend on the provision of suitable premises in terms of scale, format and location becoming available, or the provision of new floorspace through new development. Bearing in mind the proposed expansion of the Hailsham population, it would be highly beneficial to provide fit-for-purpose retail floorspace as part of a wider town centre regeneration scheme.

Prime Zone A Rents

6.37 The level of rent that businesses are prepared to pay for retail space, along with the yields achieved in investment transactions, provides a further indication of the relative strength and attraction of a centre as a shopping location, and the extent of its prime retail pitch. Information on retail rents in Hailsham is scarce due to the relatively small number of lettings/rent reviews taking place in the centre. However the 2008 Retail Study indicated that a prime Zone A of £45.00 per sqft was appropriate for Hailsham. Our recent discussions with local agents indicate that average Prime Zone A rents achieved are around £30 per sqft, although this could increase to circa £40-45 per sq ft in prime units. The evidence therefore suggests that prime rental values have fallen since 2007/08, although this is a common trend for the main of the UK's town centres, particularly for smaller and medium sized centres such as Hailsham.

Accessibility & Pedestrian Flows

6.38 The town centre is currently served by nine bus routes and has a total of 668 free car parking spaces, in addition to spaces provided adjacent to local supermarkets. At the time of CJ visited Hailsham (July 2016) the High Street was undergoing significant traffic, street and pavement improvement works costing approximately £2.6million. These works include the introduction of an additional one-way system, improvements to street lighting and the pavement surface, and re-location of some of the on-street parking spaces. At the time of the visit therefore the pedestrian and traffic flows were significantly restricted. However, we understand the works should be fully complete by January 2017, and will help to improve the overall vehicular accessibly of the centre and flow of traffic along the High Street.

6.39 The three supermarkets (Tesco, Asda and Waitrose) act as key anchors. Together they generate important linked trips and expenditure from different parts of the town centre, to the benefit of the existing shops, business and services, and to the town's overall vitality and viability. However, it is apparent from our site visit that there is potential to improve and increase the linkages between Asda and Tesco and the Town Centre. The Asda forms part of the out-dated layout of the Quintins shopping centre, which we believe acts as a barrier to positive pedestrian movement and flows to the high street. Therefore we consider that it would be highly beneficial if this centre could be redeveloped and/or re-configured to provide more modern retail space and generate the free-flow of movement into the heart of the town centre. We also consider that

the pedestrian movement between Tesco and the High Street could be improved. At the moment the High Street/ North Street/ Vicarage Lane junction does not function as a successful gateway into the Primary Shopping Frontage (albeit we note that the attractive Prezzo building positively contributes to the quality of the environment). The improvement to this element of the centre could also help to encourage linked trips.

6.40 We also believe there is significant potential to improve the legibility and attractiveness of the current connection between the main shopping and the Leisure Centre. The existing pedestrian link adjacent to the Waitrose is of poor quality in our view; it is narrow, obscure and uninviting. As a result the movement between the Leisure Centre and the main shopping area is discouraged.

6.41 In summary we consider that the linkages between the different parts of Hailsham Town Centre are relatively poor and this is acting as a deterrent to the easy movement of pedestrians across the town. In our view the centre would benefit from reconfiguration and public real improvements to establish better east-west connections, as well as signage and wayfinding initiatives.

Environmental Quality

6.42 As described above, the Town Centre is in the process of undergoing some significant street works and public realm improvements; including repaving streets and new street lighting. The two shopping centres (Vicarage Fields and the Quintins) are also undergoing some improvements, including roof tile and canopy cleaning and some repainting works. The centre also has a relatively attractive flower display. The war memorial outside the Vicarage Fields is also an attractive focus in the heart of the Town Centre. We also understand that Hailsham Parish Church is proposing to create a formal public open space in its courtyard.

6.43 Notwithstanding the fact that the centre has some attractive and well-kept historic buildings, generally we consider that the quality of the overall Town Centre environment is relatively poor and is in need of improvement. Based on our site visits we found that the majority of the frontages are poor and are characterised by confusing signs, unattractive/messy window displays and badly kept facades. The street furniture is in need of upgrade/batter maintenance. The centre would also benefit from better cleanliness and maintenance; on the day of CJ audits there was litter on the ground (especially outside of the Quintins).

6.44 Both of the shopping centres (Vicarage Field and the Quintins) are looking “tired” and dated, and do detract from the overall environment. We also consider that upgrading these centres would be of great benefit to the centre. The reconfiguration of the Quintins Centre would be especially advantageous as it would improve linkages and the overall appearance of that part of the centre.

Out of Centre Provision

6.45 The main out-of-centre provision is the Hailsham Retail Park, located approximately one mile from Hailsham town centre. It tenant mix mainly comprises “bulky goods” retailers and, as described in Section 4, the survey-derived market shares show that it is the main destination in the district for out-of-centre bulky goods shopping. For example it is achieving a market share of DIY purchases of 7.1% across the study area and a substantial 26.3% within Hailsham’s CCZ. The composition of the Hailsham Retail Park is set out in the table below.

Table 6.3 Hailsham Retail Park – Tenant Mix

Operator	Floorspace (sqm)
Wickes	2,106
Argos	1,022
Bed Centre	745
Jollyes (Pet food)	748
ARC Car Wash	204

6.46 There are also some retail units at Ropemaker Park. This is a purpose-built trade park located on Hailsham's principal industrial estate fronting South Road, linking with Hailsham town centre via A22. Tesco Express and a KFC are located here, and mainly serve local residents and passing car-borne trade.

Customer Perceptions

6.47 The household survey asked those respondents who visit Hailsham for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 6.4 What people like about Hailsham Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	25.3%	21.4%	39.4%	44.7%	17.7%	0.0%	23.1%	32.3%	16.0%	24.3%
Attractive environment / nice place	4.6%	5.9%	3.9%	0.0%	0.0%	0.0%	24.2%	0.0%	3.5%	0.0%
Convenience to home, work, etc.	33.3%	41.7%	17.8%	15.6%	61.5%	0.0%	26.4%	18.2%	37.1%	17.4%
Easy to get to by bus	1.4%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	3.8%
Easy to get to by car	0.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to park	8.5%	10.3%	5.5%	0.0%	0.0%	0.0%	0.0%	13.4%	12.6%	0.0%
Free parking	6.6%	9.8%	1.4%	0.0%	0.0%	0.0%	0.0%	18.7%	3.0%	3.8%
Good food stores	5.7%	1.9%	17.8%	7.6%	20.8%	0.0%	0.0%	5.4%	5.2%	7.6%
Good pubs, cafés or restaurants	3.3%	5.7%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%
Good range of non-food shops	7.6%	4.6%	11.9%	3.5%	20.8%	0.0%	0.0%	4.9%	16.8%	4.9%
Good range of independent shops	3.5%	2.8%	3.7%	9.2%	0.0%	0.0%	0.0%	4.9%	3.6%	4.9%
Good range of 'high street' retailers/ multiples	1.6%	1.8%	1.2%	3.5%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%
High quality shops	1.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
The market	2.6%	3.1%	2.6%	0.0%	20.8%	100.1%	11.5%	0.0%	0.0%	0.0%
Good leisure centre	1.2%	0.0%	2.8%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%
Cinema	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	0.0%	28.4%
Named Retailer - Argos	0.3%	0.0%	0.0%	0.0%	23.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Garden Centre	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	14.8%	0.0%	0.0%	0.0%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

6.48 As the table shows, some 25.3% could not think of anything they specifically liked about the town centre. Of the remainder, one-third (33.3%) identified that it was convenient to where they lived or worked. Not surprisingly this increased to 41.7% within Hailsham's *Core Catchment Zone* (Zone 1). The other key attractors mentioned included easy parking (8.5%) and free parking (6.6%); and the good choice of non-food shops (7.6%), food shops (5.7%), independent shops (3.5%) and places to eat and drink (3.3%).

6.49 The survey also asked all the respondents to the survey what improvements to Hailsham would potentially make them visit more often than they currently do for shopping and leisure reasons. The main responses are summarised in the table below.

Table 6.5 Suggested Improvements to Hailsham Town Centre

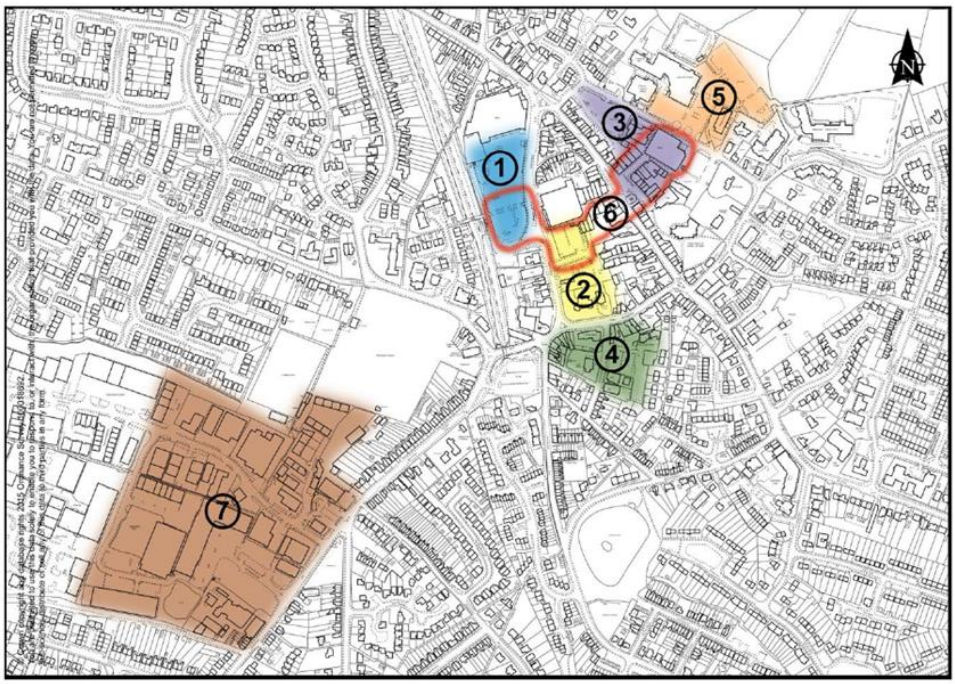
	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	55.5%	38.0%	48.9%	66.5%	48.4%	30.4%	74.1%	58.4%	57.6%	77.8%
Don't Know	25.4%	10.9%	23.7%	26.8%	48.7%	67.9%	20.8%	29.6%	19.1%	17.0%
Better access by road	1.0%	3.3%	0.0%	0.6%	0.0%	0.0%	0.0%	2.2%	0.9%	0.0%
Better public transport	0.5%	0.4%	0.0%	0.0%	0.7%	0.0%	0.0%	1.6%	1.6%	0.7%
Free car parking	0.3%	0.8%	0.7%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better parking	1.4%	2.4%	6.8%	0.0%	0.0%	0.0%	0.6%	0.0%	2.2%	0.0%
More / better non-food shops	4.5%	12.6%	7.4%	0.0%	0.0%	0.0%	0.0%	4.6%	7.6%	0.7%
More / better food shops	0.1%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More national multiple shops / High Street shops	4.7%	16.0%	12.0%	0.0%	0.8%	0.0%	0.0%	0.0%	1.4%	0.7%
More clothes shops	1.9%	8.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
More independent shops	0.9%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
More / better services	0.5%	1.3%	0.7%	0.6%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%
Less charity shops	0.3%	1.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Less empty shops	0.4%	0.5%	0.7%	0.0%	0.0%	0.0%	0.6%	0.8%	0.9%	0.0%
Improve the environment	1.3%	2.6%	2.2%	1.2%	0.0%	0.8%	0.0%	1.9%	0.9%	1.5%

6.50 The majority of respondents could not think of any improvements to Hailsham that would make them visit the centre more often. Of the remainder, the highest proportion identified the need for more multiples (4.7%), followed by more/better non-food shops (4.5%). Within Hailsham's *Core Catchment Zone* (Zone 1) a higher proportion highlighted the need for more multiples (16%) and more/better non-food shops (12.6%), followed by more clothes shops generally (8.7%).

New Investment & Potential Development Opportunities

6.51 As described in Section 2, the adopted *Core Strategy* (2013) and emerging Wealden Local Plan *'Issues, Options and Recommendations'* (October 2015) have identified the need for significant new housing development in and around Hailsham over the Plan period. In turn, this will 'fuel' the potential need for new retail floorspace. In this context, the emerging Local Plan considers seven potential development options for accommodating new retail floorspace in the town centre to help meet the allocations in the Core Strategy. The figure below shows the different site areas and options, and is reproduced from the WLP IOR for ease of reference.

Figure 6.2 Proposed Retail Allocation Options for Hailsham Town Centre



6.52 The key characteristics and development potential of each site are briefly reviewed below based on the WLP IOR:

- **1. West of North Street (Tesco's car park)** – the Council conclude that some additional floorspace could be accommodated in this area, but it is unlikely that it could accommodate all the forecast need identified by the Core Strategy and any additional floorspace that may be required through the emerging Local Plan.
- **2. East of North Street, west of the High Street and north of George Street (Asda's car park and adjacent car park)** – The WLP IOR identifies that with extensive reconfiguration and redevelopment of Asda's surface car parking some additional floorspace could be accommodated, but it is unlikely that all of the Core Strategy retail allocation for Hailsham and additional retail floorspace that may be required from the emerging Local Plan could be accommodated.
- **3. East of the High Street, west of Vicarage Lane and north of Vicarage Road** – this area currently contains the Waitrose supermarket and surrounding car parks. The WLP IOR identified the potential for the site to accommodate new floorspace subject to the potential redevelopment and extensive re-configuration of the surface car park and redevelopment of existing units.
- **4. South of Station Road, south of George Street and east of Market Street –** This area incorporates a number of existing buildings and uses, including the Fire Station, Police Station and car parking areas. The redevelopment of this area is considered as a possible long term option, should these services relocate in the future. However the area is separated from the main town centre area by George Street and the WLP IOR concluded that it was unlikely that it could accommodate the Core Strategy allocation or additional retail floorspace in a way that would contribute to the Town Centre's overall vitality and vibrancy.
- **5. East of Vicarage Lane, adjacent to the Wealden District Council offices and Leisure Centre** – This option would involve re-developing the existing surface car parks adjacent to the Wealden District

Council Offices and the Leisure Centre. However this would potentially involve the loss of existing car parking and the area is also adjacent to the proposed shopping area, in an edge-of-centre location. Furthermore access to the site would be via Vicarage Lane, a one-way street, and would involve the potential loss of surface car parking.

- **6. The southern part of Options 1, 2 and 3** – As Figure 6.2 shows, this option crosses over three of the sectors to promote an *"east-west axis"* through Hailsham Town Centre. This would provide opportunities to improve accessibility and connectivity between the various parts and functions of the town centre, and existing and new residential development adjacent to the town centre. This option would require extensive redevelopment and remodelling to achieve a more compact and accessible town centre. However, the WLP IOR concludes that there is likely to be insufficient space to accommodate the Core Strategy allocation and the projected allocation required to support growth in Hailsham through the emerging Local Plan.
- **7. Station Road/South Road and the eastern end of Diplocks Industrial Estate/Ropemakers Park** – This development option focuses on the Station Road/South Road area between the town's proposed PSA (see Figure 6.1) and Diplocks Road, down to and including the eastern end of Diplocks industrial estate and Ropemakers Park. This area includes a few shops and a petrol station/shop as well as a fast food outlet. Several units in this location are currently being used for purposes other than industrial or business use. The proximity to the main town centre shopping area and to the A22, together with the size of some of the current units available, may therefore make it an attractive proposition for additional retail floorspace that complements rather than competes with the town centre. Additional space to accommodate displaced industrial premises would have to be provided in new industrial/employment areas, which could be within the A22 Growth Corridor that is being promoted by the *South East Local Enterprise Partnership* (LEP). This option could accommodate considerable additional floorspace, albeit in an out-of-centre location, and would therefore require more detailed assessment.

6.53 In summary, the emerging Local Plan identified that the Council's Preferred Option for new retail provision within Hailsham is a combination of Option 6 and Option 7. The WLP IOR concluded that new development under Option 6 would provide a range of retail spaces with improved linkages to the High Street to help draw more people into the town centre. However, it is considered that Option 6 will not accommodate all the need identified by the adopted Core Strategy and the likely additional need arising from the emerging Local Plan. As a result Option 7 provides opportunities to support additional retail provision, subject to the relocation of existing industrial units, further retail assessment and sequential tests.

6.54 For the purpose of this Stage 1 report we have not reviewed and assessed the different potential site options in terms of their ability to accommodate the identified need for new retail floorspace, and other leisure and town centre uses over the Plan period. This assessment will necessarily be informed by the updated retail floorspace capacity forecasts identified by the Stage 2 Report, and will be considered in more detail in the final Stage 3 study.

Summary

6.55 The health check assessment has confirmed that Hailsham's retail offer is effectively anchored by its three superstores; Asda, Waitrose and Tesco. For this reason the centre is performing relatively well as a destination for food and convenience goods shopping, and the superstores do help to generate linked trips and expenditure to the benefit of other shops, services and business across the town centre. Notwithstanding the relative scale and quality of its provision, the survey-derived market shares indicate that there is still a relatively strong leakage of food shopping trips and expenditure to foodstores in and around Eastbourne (see **Section 4**). On this basis there would appear to be potential to improve the scale, quality and range of the town's foodstore offer. This could be achieved through the possible refurbishment, extension and/or redevelopment of the town's existing superstores. Furthermore neither Aldi nor Lidl are represented in the town centre, and opportunities should be considered to accommodate these popular discounters in or on the edge of the town centre.

6.56 Hailsham has a more limited comparison goods provision, and its offer is mainly value/discount led. The centre does not have any multiple fashion retailers of note, or many key high street brands generally. This is reflected by the fact that a high proportion of shopping trips and expenditure, particularly fashion purchases, are leaking to the higher order competing centres outside the District; principally to Eastbourne and, to a lesser degree, Brighton. In the context of the significant growth planned for Hailsham there would appear to be potential for improvement in the town's comparison offer.

6.57 The town centre health check and audits have also identified that there are 'gaps' in the town centre's retail and service offer, and there is a need to raise the quality of its shops, cafés and restaurants and overall town centre environment. The proposed housing allocations in Hailsham and the resultant population growth over the Plan period will significantly increase the town's catchment population, and in this context we consider that there should be potential for Hailsham to capitalise on this and attract new investment and development.

6.58 The following provides a summary of some of the other key issues and actions identified by the health check include:

- The centre does not benefit from good legibility and linkages between the anchor food stores and the prime shopping area are poor. In our view the introduction of better "*west-to-east*" connections linking the two shopping centres (Vicarage Fields and the Quintins) and the Leisure Centre, focussed around an attractive public square, would help to improve the pedestrian circuit, and they quality and legibility of the overall shopping environment. This would make it more attractive to shoppers and visitors.
- The overall shopping environment would also benefit from significant investment in and improvements to street frontages, public realm and cleanliness. Although the secondary shopping streets are attractive, the "*heart of the centre*" lacks character, and does not necessarily have a strong sense of identity. The centre would benefit from stronger "gateways", public realm improvements and better overall marketing.
- The Vicarage Fields and Quintins shopping centres are dated and do not cater well for modern retail demands in terms out units size and layout, and visibility. The out-dated and tired architectural design of these buildings also detracts from the quality of the environment in our view. It would be of great benefit

if these were reconfigured to accommodate modern retail units and contribute better to the sense of place.

- On the positive side vacancy levels in the Town Centre are relatively low and there are a number of retailers that have requirements. However, this also means that the supply of units is limited, and those that are available/ vacant are generally of small scale and do not cater for modern retailers' needs. Therefore provision of more modern larger format retail units should be encouraged.
- Hailsham has limited multiple representation and its offer is mainly dominated by independent and specialist retailers. Bearing in mind the planned growth for Hailsham, we consider that there is potential to market the town centre to attract more mainstream multiple retailers, especially fashion retailers. This would significantly improve the appeal of the centre to the local growing catchment population, and would add to its vitality and help to claw back some shopping trips and expenditure from higher order centres.
- The services facilities dominate the centre, but the level of provision is not unusual for market towns. We consider that the current provision serves the local catchment well.
- The centre also benefits from an independent cinema that has recently received some investment. This has had a positive impact on the town centre's evening economy, but we consider that there could be potential for a more modern multi-screen cinema to further strengthen the town's leisure offer and evening economy.
- Hailsham has a relatively good mix of leisure uses, such as cafés, restaurants and takeaways, but it would benefit from more up-market establishments and branded restaurants.
- Although the markets are relatively popular, they would benefit from better promotion and better facilities to encourage visitors to come regardless of the weather. Opportunities to improve and extend the number of market stalls should be assessed, alongside the potential for a covered market in the town centre.
- It would appear that the town lacks character, and does not have a good sense of identity. The centre could hence benefit from public realm improvements, and better marketing.

6.59 The Council has preferred options for accommodating additional retail floorspace and mixed use development in the town centre. The Stage 3 Report will assess and test the different development options and potential end users for the key sites identified based on the findings of both the Stage 1 and Stage 2 Reports.

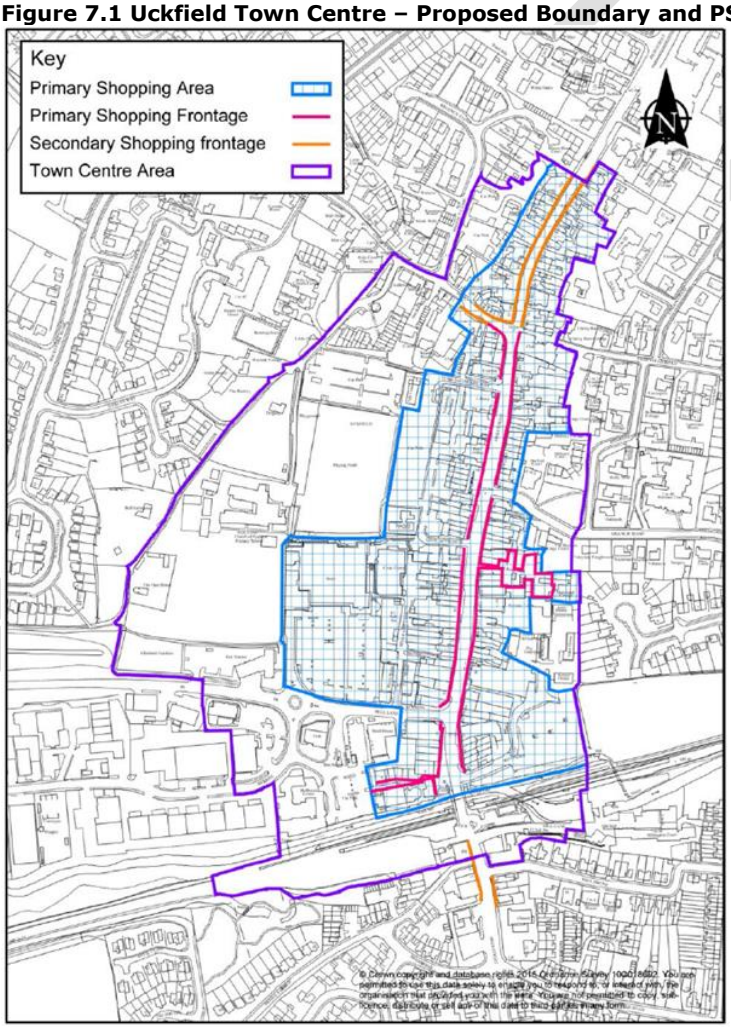
7 UCKFIELD TOWN CENTRE: HEALTH CHECK

7.1 Uckfield is situated in the middle of Wealden District, along the A22/ A26 corridor and acts as a hub and service centre for surrounding villages and settlements in the District. It is designated as a 'District Centre' in the Core Strategy and as a 'Market Town Centre' in the emerging Local Plan, at the same level in the hierarchy as Hailsham and Crowborough.

7.2 The town centre's shops and services are focussed on the linear High Street that runs north to south. The pedestrianised Bell Walk shopping centre is a secondary shopping area, together with Bell Lane. The latter provides access to the Tesco Store and the Bell Lane Industrial Estate which comprises a number of bulky goods orientated retail units. The town centre is anchored by a Tesco store and has the largest representation of national multiple comparison retailers of all the Wealden town centres. It also contains public and private sector offices, a library, places of worship and other social facilities.

7.3 The Wealden Local Plan *"Issues, Options and Recommendations*" (October 2015) has defined the Uckfield Town Centre Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below).

Figure 7.1 Uckfield Town Centre – Proposed Boundary and PSA



7.4 We review the town's proposed boundary, PSA and frontages in more detail in our Stage 3 report after taking into account the results of the Stage 2 (Need and Demand Assessment).

Retail Composition

7.5 The composition of the centre's retail and service offer is shown in the table below, based on the Council's town centre audit undertaken in May 2015.

Table 7.1 Retail and Service Composition: number and type of units at ground floor level.[48]

	2008 [GOAD]		2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	No. Outlets	%	%
Convenience	11	6%	10	5.52%	8.51%
Comparison	63	36%	66	36.46%	31.97%
Services	92	53%	92	50.82%	47.62%
Vacant	9	5%	13	7.18%	11.35%
Total	175	100%	181	100%	100%

7.6 As the table shows, there are 181 outlets in Uckfield, which is virtually the same as recorded in Hailsham (183).

Convenience Shopping

7.7 There were ten food and convenience stores in Uckfield Town Centre in 2015, which was slightly below the level recorded in 2008. This was equivalent to 5.52% of total units and is below the 2015 Goad national average of 8.51%.

7.8 Notwithstanding its under-provision of outlets, the centre's total convenience floorspace provision will be higher than the national average due to the presence of two major anchor superstores; namely Tesco and Waitrose. The other food and convenience stores in the town centre include three newsagents, a butcher, a bakery, an Off Licence, a sweet shop and a health food store.

7.9 Overall we consider that Uckfield has a relatively good food and convenience offer that is meeting the 'bulk' and 'top-up' food shopping needs of its catchment population. This is confirmed by the results of the Household Survey which indicates that the town centre retains over 66% of food shopping trips and expenditure in its Core Catchment Zone (Zone 3).

Comparison Shopping

7.10 The number of comparison retailers has increased slightly from 63 to 66 between 2008 and 2015. Current provision accounts for 36.46% all the town centre's outlets, which is above the Goad national average of 31.97% in 2015. The Council's latest audit shows that there are a number of retailers in the wide ranging comparison goods categories, including:

[48] The 2008 figures are taken from Wealden District Council Interim Shopping Study 2008 (Volume 2) as produced by Chase & Partners LLP, Table 4 (as derived from Goad Centre Report and Chase & Partners' own assessment of the centre). The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. Note that the surveyed areas for 2008 and 2015 may not be identical. The national average is taken from Experian (October 2015).

Table 7.2 Comparison Goods Categories

Comparison Goods Category	Number of Retailers
Fashion/ footwear / jewellery	11
Cards/ books/ gift shops	7
Charity shops	12
Furniture/ home stores	9
Pharmacies/ health and beauty	3
Hardware and domestic appliances	5
Florists	2

7.11 Although the centre generally has a good representation of multiple retailers, there are only three fashion stores, which is relatively low given the size of the centre. In contrast there are a high number of charity shops; albeit we understand that they do not benefit from any rent reductions.

7.12 Uckfield has also lost some retailers since 2008. These include Woolworths and Blockbuster, both of which were forced into administration and closed all their high street stores in the UK; along with Topps Tiles and Currys.

7.13 Overall we consider that Uckfield's comparison offer is adequate for a market town. This is underlined by the survey results that indicate it is retaining approximately 30% of shopping trips and retail expenditure within its CCZ (Zone 3); the highest retention rate in Wealden. However, the town is losing shoppers and expenditure to the higher order centres of Tunbridge Wells, Eastbourne and Brighton, particularly for fashion shopping.

7.14 Although the centre's overall attraction and performance would benefit from more anchor stores, key high street retailers and mid to high end quality comparison retailers, attracting these types of retailers will be difficult due to the competition from the higher order centres. We therefore believe that rather than trying to replicate the offer in these centres, Uckfield should seek to establish its own identity in the comparison sector; with the potential to promote its independent and specialist offer.

Service Provision

7.15 The number of services businesses in the town centre has remained unchanged since 2008, at 92. Current provision represents 50.82% of total units, which is above the national average of 47.62%.

7.16 In terms of the different service categories, there are 36 **retail services**. This represents 19.89% of total units in the town centre and is above the national average of 14.30% in 2015. This subcategory is dominated by the health and beauty outlets (19 units) and principally hairdressers, nail bars and beauty salons. The centre's retail service offer also includes four opticians; a chiropodist; two dry cleaners; a tattoo parlour; two shoe repair outlets; and a travel agent.

7.17 There are 21 **financial service** businesses in the town centre. This represents 11.60% of total units and is slightly above the national average of 10.74% in 2015. The main financial services include seven banks (Barclays Bank, Lloyds Bank, Hailfax, HSBC, Santander, Natwest, and Nationwide), nine estate agents, three solicitors, an insurance firm and a recruitment firm. Although provision is good in this particular

service category, Uckfield could be vulnerable to the loss of some of its banks in the future due to the growth of online banking, which is leading to some of the key banks closing or downsizing their high street stores.

7.18 There are also 36 **leisure services** in the town centre including 14 (Class A3) cafés and restaurants[49]; 12 (Class A5) takeaways; and five (Class A4) pubs/bars. There are also two betting shops and a bowls club. Uckfield also has a cinema which helps to underpin its early evening and night-time economy. The current provision of leisure services (19.33% of total outlets) is below the national average of 22.58%, which suggests that there is potential to increase the choice and quality of the town centre's offer, particularly against the background of the strong growth in the leisure sector over recent years.

7.19 Notwithstanding the potential for growth, we nevertheless consider that the town centre has a good variety and choice of services that cater well for the needs of its catchment population. We also understand that Uckfield has a relatively good evening economy. This will help to create footfall and interest in the centre at night time, as well as benefitting other local shops and businesses that are open late.

Vacancies

7.20 The Council's 2015 audit has identified an increase in the number of vacant outlets in Uckfield has increased from 7 in 2008 to 13 in 2015. Notwithstanding this increase, the centre's vacancy level currently stands at 7.18%, which is below the national average figure of 11.35%.

7.21 Based on our more recent audit of the town centre in July 2016 we identified a reduction in the number of vacant units to seven, the same as recorded in 2008. Of these, we understand that one of the vacant units had been let. We note that one of the vacant units had a sign saying that it has been let. Our audit also identified that there were no significant concentrations of vacant units to indicate that particular areas/streets are failing, or are necessarily unattractive to the market as shopping locations.

Multiple and Independent Retail Representation

7.22 Uckfield has 56 multiple businesses and some of the more high profile 'brands' are set out in the table below.

Table 7.3 Multiple Representation in Uckfield Town Centre

Barclays Bank	Martin and Co
Boots	Millets
Card Factory	Nationwide
Clarks	NatWest
Coral	Pizza Express
Costa	Santander
Dominos	Specsavers
Hailfax	Superdrug
Halfords	Vision Express
HSBC	Waitrose
Lloyds Bank	Peacocks
Macdonalds	WH Smith

[49] The cafés and restaurants include a relative good choice of multiples (such as Costa Coffee, Pizza Express, and McDonalds) and independent businesses.

7.23 As identified above, there is a good representation of banks in the town centre, but the number of multiple clothing and footwear retailers is limited to Peacocks, Millets and Clarks.

7.24 The centre's multiple offer is balanced by a good representation of independent and specialist stores, particularly in the middle/northern part of the High Street. We understand the independent retailers are very popular with the local community and have established strong customer loyalty, mainly due to the level of service and the quality of products.

7.25 Overall there appears to be a complementary mix of multiple and independent retailers, serving the centre. Uckfield, like Hailsham, would benefit from more anchor stores and key high street retailers to help increase the attraction of the centre and the retention of shoppers who live in the local catchment area but choose to shop in the higher order centres outside the District; principally Royal Tunbridge Wells. However attracting multiples to the centre will be difficult, partly due to the influence of these larger centres on market demand, and also due to the limited supply of larger format shop units in the town centre that meet the requirements of modern retailers. As a result we believe the preferred strategy for Uckfield will be to consolidate its existing multiple and service offer, and build on the attraction and success of its independent and specialist offer, by improving the quality and choice of shops, cafés and restaurants.

Street Market

7.26 Uckfield Farmers' Market operates on the first Saturday of every month at Luxfords Car Park from 9am - 1pm. It accommodates approximately 10 stalls selling local produce such as meat, fruit and vegetables. We understand that the market is becoming more popular, and is currently being revitalised. It would however benefit from a more central location where it could accommodate more stalls and will have the necessary 'critical mass' to attract more people and generate linked trips to the benefit of other shops, services and facilities in the centre. It could also be beneficial for the town centre's overall vitality and viability to provide a more permanent covered market, as this will lead to better management and marketing of the offer, and mean that it can operate year-round regardless of the weather.

Market Demand Assessment

7.27 In 2007/08 there were 17 retailers seeking representation in Uckfield, including Bon Marche, British Heart Foundation, Card Factory, Dorothy Perkins, Gamestation, Gamestore, Argos, Majestic Wine Warehouse, Pets at Home, Poundland., Robert Dyas, Scope, Subway and Tile Magic. This represented a total floorspace requirement of 6,772 sqm gross, which was significantly higher than for Hailsham at the time (2,071 sqm gross).

7.28 According to the latest Requirement List and CoStar Requirement Report as at July 2016, there are currently 12 operators who are seeking representation in Uckfield (see table below).

Table 7.4 Uckfield Town Centre – Retailer Requirements

Operator	Use Class	Size of Unit (Max)	
		Sqm	Sq ft
Bonmarche	A1	464	5,000
Finch House	A1	232	2,500
Halfords Autocentres	B2	557	6,000
KFC (Herbert Restaurants Group t/a)	A3	278	3,000
Holland & Barrett	A1	650	7,000
Marstons	A4	836	9,000
Pets at Home	A1	1,393	15,000
Salvation Army	A1	139	1,500
The Original Factory Shop	A1	1,393	15,000
The Works (books, arts & crafts)	A1	232	2,500
Vets4Pets	D1	232	2,500
Aldi	A1	1,439	15,500
TOTAL		**7,849**	**84,500**

7.29 Although the number of businesses seeking space in Uckfield (12) is currently higher than for Hailsham (8), the total floorspace requirement of 7,849 sqm gross is slightly lower. Overall the current market demand for Uckfield is good, and opportunities should be explored to accommodate the needs of some of the higher profile retailers and service businesses seeking representation in the town. This includes Aldi, which would strengthen the town's food offer and benefit other shops and businesses through the generation of linked trips and expenditure if a site can be found either in or on the edge of the Primary Shopping Area that is well connected and easily accessible for pedestrians.

Prime Zone A Rents

7.30 We have been advised by local agents that achievable Prime Zone A rents in Uckfield currently stand at approximately £40 per sqft, which is below the levels currently achieved in Hailsham and Crowborough. We also understand from local agents that the demand for retail floorspace in Uckfield exceeds the supply of "fit-for-purpose" units, which will push up Zone A rents over time. The limited supply reflects the fact that many of the existing town centre units cannot accommodate modern retailer requirements (i.e. they are the "wrong configuration" as they are too small and/or the wrong shape). The lack of suitable units in the town centre in terms of scale and format could result in some of the retailers with requirements for the town seeking out-of-centre locations, if suitable sites and opportunities become available. As a consequence we advise the local authority to assess the potential to accommodate any current and future market demand on existing sites either in or on the edge of the town centre, or to amalgamate units where possible to create larger shops and shop frontages.

Accessibility & Pedestrian Flows

7.31 Uckfield Town Centre benefits from a direct rail link to London, and the Council continues to safeguard the potential extension to Lewes where it could connect to another part of the national network. There is also a

bus station, adjacent to the railway station, at the bottom of the High Street. This is served by 6 bus routes and provides a transport hub with a wide range of services to neighbouring towns and villages.

7.32 The town is well served in terms of parking spaces and free parking. The two supermarkets (Tesco and Waitrose) have free parking and are popular with shoppers and visitors to the town. There is a new station car park (charged at £4 a day), which is popular with commuters, and there is substantial free public parking (344 spaces) available at Luxford Field to the west of the High Street. There is also some limited additional on-street car parking provision close to the High Street, although we understand that some of these spaces are being lost as a result of the current highway and pavement improvement works. At the time of the our audit of the town centre in July 2016 the on-going works were impacting on pedestrian and traffic flows, but they will significantly improve flows across the centre once completed by January 2017.

7.33 Notwithstanding the current improvements, Uckfield does suffer from congestion, especially along A22 and Bellfarm Road, which impacts on easy access to the centre particularly at peak period. It would appear that re-modelling of the highway design and delivering a traffic management scheme in the town centre would be of great benefit.

Environmental Quality

7.34 Uckfield is a relatively attractive town. On the day of our audits it was relatively clean and litter free, despite the significant impact of the street improvement works. We noted that the centre does not benefit from much decoration, such as flower displays and the public art around Bell Walk (wooden statues) is in need of some care and restoration.

7.35 We identified that some buildings in the town centre benefit from attractive frontages and facades, whereas others are of poor architectural quality or looking “tired”. The centre lacks a clear focal point in our judgement and which could take the form of a defined public space/square that acts as a meeting point, and potentially a location for a more centrally-located street market. In addition to the current street improvements, we believe the town centre would benefit from public realm improvement to establish a better sense of place and identity.

7.36 Bell Walk shopping centre is also dated compared to modern shopping centres/parades. It has an inward facing layout which is not inviting and does not promote linkages with the rest of the centre. In our judgement there would appear to be significant potential to improve and/or redevelopment this part of the town centre, as well as opportunities to create stronger linkages to the bus station and the existing larger format retail units off Bell Lane.

7.37 In summary, although the centre appears to be well maintained, we believe there are significant opportunities to improve the overall shopping environment to the benefit of shoppers and visitors to the town.

Out of Centre Provision

7.38 The main edge and out-of-centre provision in Uckfield is located on Bell Lane, off Bell Farm Road. The larger format retail units here include Halfords, Topps Tiles, Pennell Carpets, Carpet Right and MacDonald’s. This concentration of larger format stores is within easy walking distance of the town centre,

via Bell Walk shopping centre, and there would appear to be significant potential in our view to improve the pedestrian connections between the high street and this alternative location.

Customer Perceptions

7.39 The household survey asked those respondents who visit Uckfield for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 7.5 What people like about Uckfield Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	22.0%	15.5%	21.8%	23.6%	14.3%	23.7%	35.0%	13.5%	39.7%	27.3%
Attractive environment / nice place	8.0%	15.8%	2.3%	9.8%	0.0%	0.0%	12.9%	8.8%	10.7%	7.7%
Convenience to home, work, etc.	16.9%	8.4%	6.1%	42.1%	2.7%	13.4%	1.6%	22.1%	0.0%	10.6%
Easy to get to by bus	0.6%	0.0%	0.0%	0.0%	1.1%	0.0%	2.3%	0.0%	0.0%	3.2%
Easy to get to by car	0.6%	2.0%	0.0%	0.7%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%
Easy to park	8.0%	1.9%	7.1%	4.9%	10.1%	0.0%	7.6%	19.5%	4.7%	7.4%
Free parking	6.3%	5.4%	0.0%	5.7%	2.4%	0.0%	6.3%	22.3%	0.0%	0.0%
Friendly atmosphere	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Good food stores	4.2%	14.0%	7.1%	1.5%	2.6%	0.0%	2.1%	3.1%	6.0%	4.1%
Good pubs, cafés or restaurants	2.3%	0.0%	8.6%	1.7%	4.5%	0.0%	0.0%	1.0%	0.0%	0.0%
Good range of non-food shops	20.0%	28.7%	27.6%	17.5%	24.0%	25.7%	19.5%	12.9%	6.0%	10.6%
Good range of independent shops	14.5%	13.8%	18.4%	10.0%	26.6%	7.9%	8.9%	10.8%	39.7%	3.5%
Good range of 'high street' retailers/ multiples	3.2%	5.4%	5.0%	2.5%	5.7%	3.4%	0.0%	3.1%	0.0%	0.0%
High quality shops	1.4%	1.9%	3.5%	0.0%	1.1%	0.0%	0.0%	3.3%	0.0%	3.2%
Quiet	0.8%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%
Good library	0.3%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%
Familiar / know where everything is	1.2%	0.0%	0.0%	0.6%	4.4%	0.0%	1.6%	1.2%	0.0%	0.0%
Cinema	4.8%	0.0%	2.1%	0.6%	7.4%	14.7%	11.0%	8.1%	0.0%	10.0%
Good charity shops	1.3%	2.0%	5.0%	0.6%	0.0%	3.4%	1.6%	0.0%	0.0%	0.0%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

7.40 As the table shows, some 22% could not think of anything they specifically liked about the town centre. Of the remainder, the highest proportions identified the good choice of non-food shops (20%) and independent shops (14.5%). Some 17% indicated that it is convenient to where they live or work, and this increased to 42.1% in Uckfield's *Core Catchment Zone* (Zone 3). The other key attractors mentioned included the nice environment (8%); convenient parking (8%); free parking (6.3%); and the cinema (4.8%).

7.41 The survey also asked all the respondents to the survey what improvements to Uckfield would potentially make them visit more often than they currently do for shopping and leisure reasons. The main responses are summarised in the table below.

Table 7.6 Suggested Improvements to Uckfield Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	57.6%	60.4%	60.7%	26.9%	53.2%	36.1%	65.1%	49.3%	74.4%	81.0%
Don't Know	21.3%	34.3%	11.6%	1.9%	26.6%	63.2%	19.8%	11.2%	13.0%	16.0%
Better access by road	1.9%	0.4%	3.1%	2.5%	1.5%	0.0%	2.6%	6.9%	0.0%	1.5%
Better public transport	0.5%	0.0%	0.7%	0.0%	0.0%	0.8%	0.0%	2.8%	0.9%	0.7%
Free car parking	0.9%	0.0%	2.8%	0.7%	1.4%	0.0%	0.0%	3.6%	0.9%	0.0%
More / better parking	2.1%	0.9%	7.1%	1.2%	3.3%	0.0%	1.5%	6.7%	0.9%	0.0%
More / better non-food shops	3.5%	0.0%	2.2%	18.3%	3.4%	0.0%	3.2%	3.4%	0.7%	0.0%
More / better food shops	0.9%	0.0%	0.8%	4.2%	0.7%	0.0%	0.8%	1.8%	0.0%	0.0%
More national multiple shops / High Street shops	5.2%	0.9%	4.7%	26.4%	1.6%	0.0%	2.0%	5.9%	5.1%	0.0%
More clothes shops	0.5%	1.2%	1.9%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
More independent shops	0.5%	0.0%	0.7%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better services	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Less charity shops	1.0%	0.0%	1.6%	5.4%	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%
Less roadworks	2.2%	1.0%	2.2%	7.3%	5.5%	0.0%	1.4%	1.9%	0.0%	0.0%
Improve the environment	1.2%	0.0%	1.4%	2.4%	0.0%	0.0%	0.8%	1.8%	5.1%	0.0%

Notes: Multiple responses.

7.42 The majority of respondents could not think of any improvements to Uckfield that would make them visit the centre more often. Of the remainder, the highest proportion identified the need for more multiples (5.2%), followed by more/better non-food shops (3.5%). Within Uckfield's *Core Catchment Zone* (Zone 3) a higher proportion highlighted the need for more multiples (26.4%) and more/better non-food shops (18.3%). In CCZ3 a small proportion also identified the need for fewer charity shops (5.4%). The disruption caused by the current roadworks and pavement improvements on visits to Uckfield is reflected by the fact it was identified by 7.3% of respondents in CCZ3.

New Investment & Potential Development Opportunities

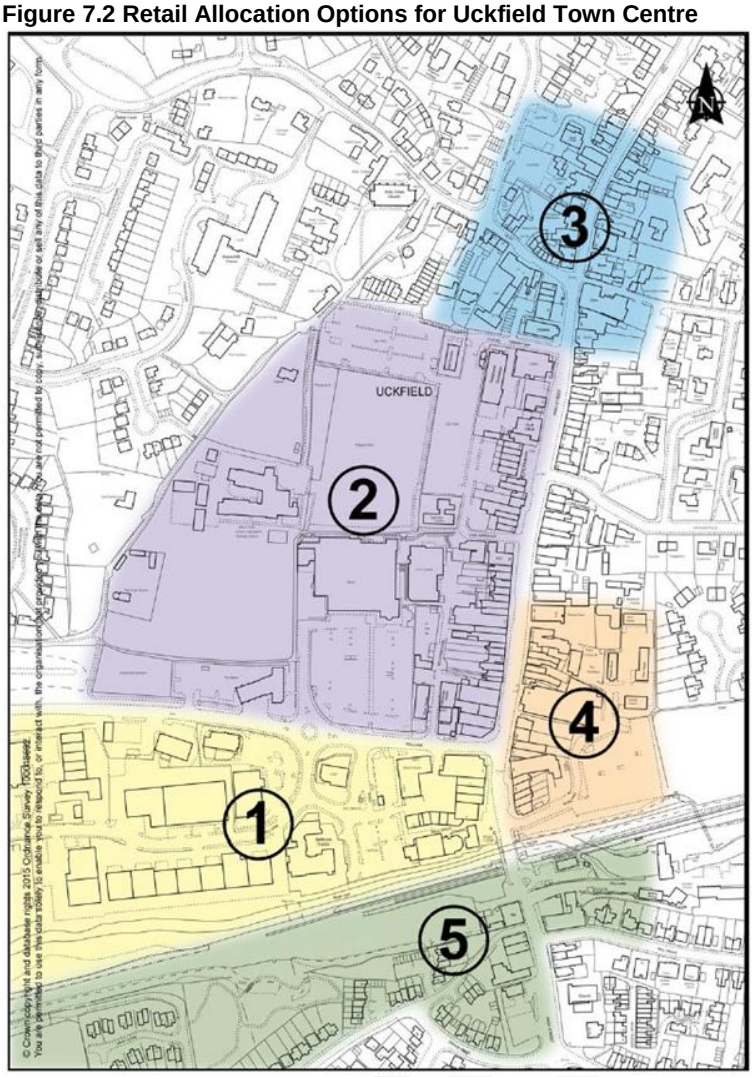
7.43 As described in Section 2, the Wealden Local Plan *'Issues, Options and Recommendations'* document (WLP IOR October 2015) assesses five potential development options for accommodating new retail floorspace in Uckfield Town Centre to meet the forecast needs and new housing identified by the adopted Core Strategy. The Core Strategy supports "*sensitive redevelopment and expansion of the town centre, including additional retail floorspace of around 10,707 sq. metres net retail floorspace as part of a comprehensive scheme of improvements which will increase the attractiveness of Uckfield and help create a vibrant and inclusive town centre"* (paragraph 6.11) .

7.44 Map 35 of the *Retail Allocation Options* for Uckfield Town Centre is reproduced below for ease of reference and the key findings for each site are also summarised below.

1. Bell Lane South – the emerging Local Plan considers possible intensive redevelopment of the site for a mix of uses. However significant land assembly would be required and there is also a flood risk issue. The WLP IOR concludes that it is unlikely that this sector alone could accommodate all of the additional floorspace that may be required.

2. Bell Lane North and Luxford Area – the WLP IOR identifies that this area provides considerable space and scope for the provision of a range of new retail floorpsace in close proximity to the High Street, and public transport interchanges. There is also an opportunity to create shop frontages onto Luxford Field, and the potential to create a pedestrian circuit. It concludes that this area provides scope to accommodate a considerable proportion, if not all of the additional floorspace requirements from the Core Strategy and any additional floorspace that may be required through the emerging Plan period.

Figure 7.2 Retail Allocation Options for Uckfield Town Centre



3. High Street North – Given the land take and land assembly required, and the possible need to accommodate existing uses which may be displaced, the WLP IOR concludes that it is unlikely that this site could accommodate much if any, of the required additional floorspace that may be required.

4. High Street South – The WLP IOR also concluded that given land availability, multiple land ownership, flood risk issues to the south and the possible need to accommodate existing uses which may be displaced, it is unlikely that this area alone could accommodate all the additional floorspace.

5. South of Uckfield Railway Station – This development of this site is also limited by existing land uses and land assembly issues, flood risk and the severance from the main town centre area caused by the railway and the River Uck.

7.45 The emerging Local Plan concludes that the Council's Preferred Option for testing is ***Site Option 2***; the area to the west of the High Street, north of Bell Lane, east of Belmont Road, Luxford Field and car parking area.

7.46 We assess the different potential site options and their ability to accommodate any identified need for new retail floorspace over the plan period in the Stage 3 Report, which will be informed by the key findings of this Stage 1 Report and the Stage 2 Report.

Summary

7.47 In summary the key evidence and property market indicators suggest that Uckfield Town Centre is performing relatively well as a shopping and leisure destination, in line with its role and function in the District's network and hierarchy of centres.

7.48 Notwithstanding this, the centre would benefit from a number of improvements to ensure it maintains and enhances its vitality and viability of the short, medium and long term.

7.49 Some of the key findings identified by the health check and town centre audit are set out below:

- The centre is well served in terms of convenience provision with two main supermarkets (Tesco and Waitrose) that help to generate linked trips and expenditure to the benefit of other shops, services and businesses across the town centre.
- In general terms there appears to be a good and complementary mix of multiple and independent retailers. However the centre lacks comparison anchors, key high street retailers, fashion retailers and mid to high end quality comparison retailers.
- The centre faces strong competition from larger higher order centres in neighbouring areas, principally Royal Tunbridge Wells, and cannot be expected to compete with these centres for major national fashion and clothing multiples. In our judgement Uckfield is better placed to build on the success of its strong and specialist independent offer, by improving the choice and quality of its provision.
- The centre's overall offer is dominated by service businesses and these are meeting the needs of Uckfield's local catchment population. The offer also includes a cinema and mix of cafés and restaurants, which helps to underpin a relatively popular and successful night time economy.
- Vacancy levels in the centre are low, which is a good indicator of its attraction and relative performance as a shopping location.
- Although there are retailers and leisure operators who are currently interested in taking space in Uckfield (including Aldi), there is a limited supply of modern larger format units and/or suitable and available development sites to meet their requirements. Therefore the provision of modern retail floorspace should be encouraged. This will depend on identifying suitable development sites either in or on the edge of the town centre, or alternatively the reconfiguration and amalgamation of existing shop units and frontages where the opportunity arises. However this may require significant land assembly and the use of the local authority's CPO powers to help create the most suitable and viable development opportunities.
- The quality of the environment is mixed. The centre lacks a clear focal point and in our judgement it would benefit from a public realm improvement strategy.
- In our judgement the reconfiguration and potential redevelopment of the Bell Walk shopping centre would be of great benefit to the town centre's overall offer. The redevelopment of this centre would, in our view, help with the provision of modern retail floorspace that is currently lacking in the town centre, as well as enhancing the overall appearance and character of the centre.

- The market seems to be on the rise, gaining popularity and investment. However a more central, covered location would be of great benefit. Additionally active marketing and advertising should be utilised to raise awareness, seeking to make the market into one of the top attractions of the centre.
- Uckfield does suffer from traffic congestion and this does impact on accessibility and detract from the overall shopping experience. The re-modelling of the highway and delivering a traffic management scheme in the town centre would be of great benefit. We understand that the works to the pavement that are currently being undertaken should help to resolve the conflict between pedestrians and traffic on High Street.

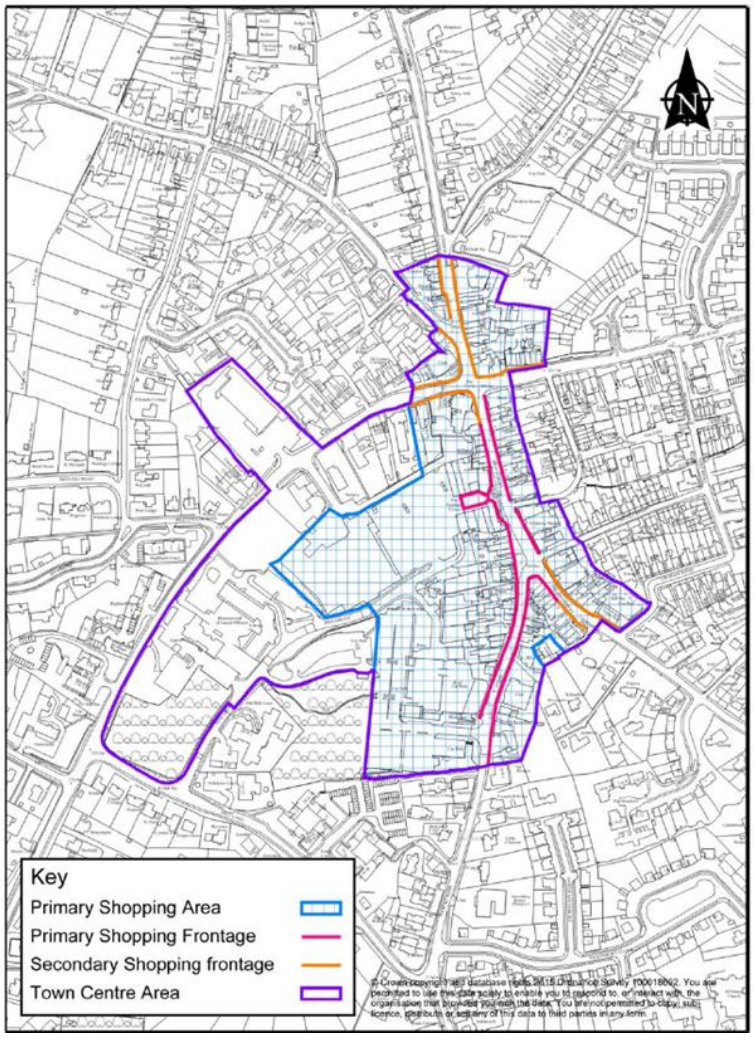
8 CROWBOROUGH TOWN CENTRE: HEALTH CHECK

8.1 Crowborough is a market town and is the most northerly town in the District. Its retail offer is focused around the High Street and Crowborough Cross, the area around the Broadway and Croft Road and the Waitrose and Morrison's supermarkets to the west of Croft Road/High Street and south of Beacon Road. However its role and function as a shopping destination is largely influenced by its proximity to Royal Tunbridge Well.

8.2 Crowborough is designated as a '*District Centre'* in the Core Strategy and as a *'Market Town Centre'* in the emerging Local Plan, at the same level in the hierarchy as Hailsham and Uckfield.

8.3 The Wealden Local Plan *"Issues, Options and Recommendations*" (October 2015) defines the Crowborough Town Centre Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below):

Figure 8.1 Crowborough Town Centre – Boundary and PSA



Extract from Wealden Local Plan "Issues, Options and Recommendations" (October 2015), Map 30.

8.4 We will review the town's proposed boundary, PSA and frontages in more detail in our Stage 3 report after taking into account the results of the Stage 2 (Need and Demand Assessment).

Retail Composition

8.5 The composition of the centre's retail and service offer is shown in the table below, based on the Council's town centre audit undertaken in May 2015.

Table 8.1 Retail and Service Composition: number and type of units at ground floor level.[50]

	2008 [GOAD]		2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	No. Outlets	%	%
Convenience	5	5%	7	5.73%	8.51%
Comparison	42	41%	35	27.87%	31.97%
Services	47	46%	66	54.10%	47.62%
Vacant	8	8%	14	11.48%	11.35%
Total	**102**	**100%**	**122**	**100%**	**100%**

8.6 As the table shows, there are 122 outlets in Crowborough, which is lower than recorded for Uckfield (181) and Hailsham (183).

Convenience Shopping

8.7 There were seven food and convenience stores in the town centre in 2015, which was higher than recorded in 2007/08. Current provision represents 5.73% of the total units in the centre, which is significantly below the national average of 8.51%. The centre's food offer is anchored by three superstores, namely Waitrose, Morrisons and Lidl. As a result its total floorspace provision will be significantly above the national average. The other food and convenience stores include a newsagent, wine merchant and two smaller convenience stores (Cross Country Stores and KMSH Food and Wine).

8.8 Overall we consider that Crowborough's catchment population is well served in terms of food and convenience provision. This is confirmed by the Household Survey which indicated that the town centre retains over 60% of shopping trips and convenience goods expenditure in its Core Catchment Zone (4).

Comparison Shopping

8.9 Between 2008 and 2015 the number of comparison retailers has decreased from 42 to 35. Current provision accounts for 27.87% all total units, which is below the national average of 31.97%. As the table below shows, the town centre has a number of retailers in the wide ranging comparison goods categories.

[50] The 2008 figures are taken from Wealden District Council Interim Shopping Study 2008 (Volume 2) as produced by Chase & Partners LLP, Table 4 (as derived from Goad Centre Report and Chase & Partners' own assessment of the centre). The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. Note that the surveyed areas for 2008 and 2015 may not be identical. The national average is taken from Experian (October 2015).

Table 8.2 Comparison Goods Categories

Comparison Goods Category	Number of Retailers
Fashion/ footwear / jewellery	7
Cards/ books/ gift shops	3
Charity shops	3
Furniture/ home stores	9
Pharmacies/ health and beauty	3
Hardware and domestic appliances	3
Variety store	1
Florists	2
Pet / Toy shops	2

8.10 There are several major comparison retailers in the town including M&Co, WH Smith, Morrisons Pharmacy and Boots the Chemist. However the centre's retail offer is mainly dominated by independent retailers.

8.11 Overall we consider that the comparison offer is adequate for a market town like Crowborough, given its proximity to higher order centres and principally Royal Tunbridge Wells. This is confirmed by the household survey results which indicate that some 43% of shopping trips and expenditure on comparison goods in CCZ4 goes to Royal Tunbridge Wells, with 24% being retained in CCZ4 by Crowborough.

Service Provision

8.12 The number of service businesses in the town centre has remained unchanged since 2008, at 66. Current provision accounts for 54.10% of total units, which is above the national average of 47.62%.

8.13 In terms of the different service categories, there are 30 **retail services**. This represents 24.59% of total units in the town centre, which is significantly above the national average of 14.30% in 2015. This subcategory is dominated by health and beauty outlets (12 units) and principally hairdressers, nail bars and beauty salons. The centre's retail service offer also includes:

- an optician,
- a chiropodist and an osteopath,
- three dry cleaners,
- two funeral directors,
- two shoe repair shops,
- an optometrist, and
- two travel agents.

8.14 There are 17 **financial service** outlets in the town centre. This represents 13.93% of the total units, which is slightly above the 2015 national average of 10.74%. The financial services include five banks (HSBC, Lloyds, Natwest, Santander, Barclays Bank) and five estate agents; three solicitors; a finical advisor; and an accountancy firm. The town's estate agents are mainly concentrated at the London Road end of High Street creating a hub for that service.

8.15 There are 19 **leisure services** in the town centre, which represents 15.57% of total units and is below the national average of 22.58%. The mix of leisure uses includes:

- seven cafes and restaurants (including Costa Coffee);
- 8 takeaways;
- a betting shop;
- a bar;
- a sports club (Crowborough Constitutional Club); and
- a leisure centre (Goldsmiths Leisure Centre) - albeit it is located about 10 minute walk from the main shopping area.

8.16 We note that The Crowborough Cross pub has re-opened since the 2015 audit, and understand it has become a very popular facility. However, in general terms, we have been informed that Crowborough does not have a vibrant evening economy and only a few facilities remain open after the shops close.

Vacancies

8.17 The number of vacant outlets in Crowborough has increased from 8 to 14 between 2008 and 2015. The centre's vacancy level currently stands at 11.48%, which is broadly consistent with the 2015 national average of 11.35%. Based on our most recent audit of the town centre in July 2016 we identified only seven vacant units, which represents a significant improvement from the 2015 figure. However, as for both Hailsham and Uckfield, the area surveyed by CJ may not be consistent with the area surveyed by the Council in 2015.

8.18 There is currently no significant concentration of vacant units in the town centre, which is a positive indication that none of its main shopping streets/areas are failing. There are also a number of reasons for the some of the current vacancies in the town centre. For example, although Chapple Place on Crowborough Hill is a new unit, we understand that the ground floor unit that has permission for Class A3 uses has been vacant for about two years due to legal disputes, despite the fact that it has received interest from potential occupies. Further to this, the Old Fire Station Café on High Street is in a dilapidated state and is not attractive to perspective occupiers without investment. We also understand that the Mother India unit (next to the Original Factory Store unit) will soon be occupied by a charity shop. Finally, we have been informed that the former Hearing and Mobility Shop which was vacant at the time of our visit, is to be re-occupied by the same retailer.

Multiple and Independent Retail Representation

8.19 Crowborough has 27 multiple businesses, which is significantly below the provision in Uckfield (56) and slightly lower than for Hailsham (32). Some of the main multiples are listed in the table below.

Table 8.3 Multiple Representation in Crowborough Town Centre

HSBC Bank	M&Co
Lloyds Bank	Waitrose
NatWest	Vision Express
Santander	WH Smith
Barclays Bank	Boots The Chemist
Coral	Dominos
Costa	Lidl
Johnsons Dry Cleaners	Morrisons
Original Factory	

8.20 As the table shows, the centre's main multiple offer is dominated by its banks and food superstores. This multiple offer is complemented by a wide range and quality of independent businesses, which significantly outnumber the multiples. We understand these are very popular with the local community and have established a strong customer loyalty.

8.21 Overall we consider there is a good mix of multiple and independent retailers. Given the nature of Crowborough we consider that to sustain its attractiveness and to compete with other nearby centres it should build on its independent offer, improving the quality of provision and building on its niche retail and service offer.

Street Market

8.22 Crowborough Farmers' Market takes place every fourth Saturday of every month, in the car park adjacent to the Crowborough & District Social Club, Croft Road from 9am - 1pm. There are about six regular stalls selling a range of plants and food from local producers. We understand that the market is not particularly popular, perhaps due to its poor peripheral location away from the high street. We consider that this is a missed opportunity, and agree with the Core Strategy recommendations to encourage and promote the market as a key attraction for the town centre. In our judgement the relocation of the market to a more central position in the town centre would definitely help to strengthen its overall viability and increase the number of stallholders. This should be considered alongside more active marketing and promotions.

8.23 We also understand that once a year Crowborough hosts a market festival called *"Crowborough Summer Fun Day*", where the High Street becomes pedestrianised and is taken up by local market stalls selling local produce. We have been advised that this event is very popular and there have been many requests to increase in its frequency throughout the year. However due to the preparatory works required (e.g. finding volunteers, processing traffic closure orders, etc.) it has not been possible to host the event more often. This is a pity, and is certainly something that should be explored further to help promote the market and town centre to a wider audience.

Market Demand Assessment

8.24 In 2007/08 there were ten retailers seeking representation in Crowborough (including Austin Reed, Caffé Nero, Card Warehouse, Costa Coffee, Argos, HSBC, Marie Curie Cancer Care, Phase Eight, Savers and Superdrug). This was higher than the number of retailers seeking space in Hailsham (5) and lower than for Uckfield (17). Overall these requirements translated into a total demand for 4,691 sqm of floorspace in Crowborough, which compared with 2,01 sqm for Hailsham and 6,772 sqm for Uckfield.

8.25 According to the latest Requirement List and CoStar Requirement Report as at July 2016, there are currently eight operators with requirements for representation in Crowborough (see Table below).

Table 8.4 Hailsham Town Centre – Retailer Requirements

Operator	Use Class	Size of Unit (Max)	
		Sqm	Sq ft
Marstons	A4	836	9,000
Pam Purred Pets	A1	465	5,000
Peacocks	A1	929	10,000
Pets at Home	A1	1,394	15,000
Savers	A1	325	3,500
Pets Corner	A1	232	2,500
Superdrug	A1	511	5,500
The Works	A1	232	2,500
TOTAL		4,924	53,000

8.26 Together these eight operators are seeking up to 4,924 sqm gross floorspace, which is slightly higher than the figure in 2008, but lower than the current requirements for both Uckfield and Hailsham. It is clear from the list of requirements that some of these retailers (i.e. Peacocks, Superdrug, The Works, etc.) would help to improve the town centre's multiple offer, whereas others (Pets at Home) are generally seeking larger format units in edge and out of centre locations. The challenge will be to find suitable premises in the town centre to meet the needs of these retailers, either through the reconfiguration and amalgamation of existing units, or preferably through new development.

Prime Zone A Rents

8.27 Information on retail rents in Crowborough is scarce due to the relatively small number of lettings/rent reviews taking place in the centre. The 2008 Retail Study indicated that prime Zone A rents stood at approximately £40 per sqft in 2007/08. Based on our discussions with local agents we understand that current Zone A's are approximately £25-30 per sqft, which is below the levels achieved in Uckfield and Hailsham. However we believe that rents could be higher if suitably sized units become available on the prime pitch that meet the needs of multiple retail and service business seeking representation in the town centre.

Accessibility & Pedestrian Flows

8.28 Crowborough benefits from relatively good accessibility by road via the A26, which links the town centre to Royal Tunbridge Wells, Lewes, Eastbourne and other centres along the south coast.

8.29 The town centre is currently served by four main bus routes, making it accessibly to the local population. Crowborough also has a railway station, although this is some two miles to the south east of the town centre and does not promote pedestrian linked trips. We believe there is a relatively good level of free car parking provision across the town (650 spaces), and the main car parks are associated with the food superstores and also at Pine Grove.

8.30 With regards to in-centre accessibility, and the movement of cars and pedestrians across the town centre, the main A26 Beacon Road to the north of the High Street (the through route from Uckfield to the M25) does act as a barrier to pedestrian movement cutting off the facilities to the north.

8.31 It is also noted that the pedestrian pavements along the High Street are very narrow. This obstructs easy pedestrian movement and flow and detracts from the retail units by reducing the browsing time at street level. It would be beneficial for the High Street therefore it the pavements could be widened to make the shopping street more pedestrian friendly and help to reduce the conflict with the heavy traffic flow.

8.32 In addition to the above, we noted during the course of our sites visits and audits to the town centre that the general street signage and wayfinding across the different parts of the town centre was confusing, providing incorrect directions in some cases.

8.33 Also, although Morrisons and Waitrose supermarkets are the main anchors to the centre, neither have a good physical relationship with the centre. Both stores are segregated from the main shopping area by car parks, which discourage shoppers to link their food shopping trips with a visit the rest of the centre. It would be greatly beneficial if this was addressed, so that linked trips can be encouraged. One initiative intended to promote stronger links is the recent permission (reference: WD/2016/0172/AN) for an archway sign at the bottom of the Waitrose car park, which will provide wayfinding and direction to the High Street via a pedestrian path. However this will still not address the pedestrian route itself, which is narrow, overgrown with vegetation and does not feel safe in our view (particularly in the late afternoon and evenings). Hence there is still potential to improve this pedestrian route and others to link the main superstores to the high street.

Environmental Quality

8.34 Crowborough is a relatively attractive market town. The majority of the building frontages are well kept, and have attractive facades and window displays. The centre is mostly free of litter and has an attractive flower basket display, which benefits the overall environment.

8.35 However improvements to the public realm and street furniture is needed in our view, as it is looking tired and dated, and requires maintenance and/or replacement. For example, Crowborough Cross is located at a busy crossroads and an important gateway to the town centre, but the environment and public realm is poor in our option and we understand that it is hardly used. Given that the Sir Arthur Conan Doyle statue is located here and provides a link to the town's heritage, we recommend that more is done to utilise and improve this space to create an attractive gateway to the town centre and its wider offer.

8.36 In our opinion the Fernbank Shopping Centre, owned by Morrisons, would also benefit from new investment. For example, the access from the High Street is restricted by a wall/fence treatment which accommodates the changes in the ground levels. This impedes views of this area, and does not encourage easy access. The "Morrison" sign implies that there is a front entrance; however this leads to an underground car park with the supermarket being located much further away at the back of the car park, and is best accessed via a lift/stairs located adjacent to the Original Factory Store. As a result this section of the town centre lacks

legibility, sense of security and visual appeal. This element of the centre would significantly benefit from re-configuration in our view.

Out of Centre Provision

8.37 The only major retail provision outside Crowborough Town Centre is the Tesco Superstore located at Sybron Way. There are also two garden centres, namely Millbrook Garden Centre and B.L Jordan & Son. Marks and Spencer also has a Simply Food store in the BP petrol filling station on Croft Road.

Customer Perceptions

8.38 The household survey asked those respondents who visit Crowborough for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 8.5 What people like about Crowborough Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	19.9%	31.2%	23.7%	33.8%	16.2%	8.1%	11.6%	27.3%	0.0%	21.1%
Attractive environment / nice place	8.8%	12.1%	0.0%	4.8%	7.2%	9.3%	24.5%	23.9%	0.0%	5.5%
Convenience to home, work, etc.	33.4%	12.1%	25.0%	19.1%	56.2%	27.8%	30.6%	5.8%	0.0%	14.7%
Easy to get to by car	3.1%	0.0%	15.5%	3.2%	1.9%	3.3%	0.0%	0.0%	0.0%	0.0%
Easy to park	4.7%	0.0%	2.1%	2.2%	4.6%	11.4%	6.8%	5.8%	0.0%	2.6%
Good facilities	1.8%	0.0%	2.1%	1.2%	2.4%	3.3%	0.0%	0.0%	0.0%	2.6%
Good charity shops	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%
Good leisure centre	0.6%	0.0%	0.0%	0.0%	0.7%	0.0%	2.9%	0.0%	0.0%	0.0%
Good pubs, cafés or restaurants	1.6%	0.0%	2.3%	0.0%	2.1%	1.1%	2.7%	0.0%	0.0%	2.6%
Good range of non-food shops	9.2%	15.6%	6.4%	6.8%	12.8%	14.5%	0.0%	5.8%	0.0%	7.9%
Good range of independent shops	6.5%	12.1%	4.3%	14.2%	0.8%	8.6%	8.7%	5.8%	100.0%	2.6%
Good range of 'high street' retailers/ multiples	2.0%	0.0%	0.0%	0.0%	2.2%	4.4%	2.7%	0.0%	0.0%	5.3%
Affordable shops	0.5%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%
Makes a change from other places	0.5%	13.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Safe and secure	0.2%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%
M&Co store	0.3%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good bookshops	0.2%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Free parking	3.7%	0.0%	2.1%	1.2%	3.7%	11.2%	6.1%	0.0%	0.0%	0.0%
John Lewis store	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

8.39 As the table shows, almost 20% could not think of anything they specifically like about the town centre. Of the remainder, the highest proportions identified the fact that it is convenient to where they live or work (33.4%). Not surprisingly this was mentioned by a higher proportion of respondents (56.2%) living in Crowborough's *Core Catchment Zone* (Zone 4). The centre's other key attractors mentioned included the good choice of non-food shops (9.2%) and independent shops (6.5%); the nice environment (8.8%); and convenient (4.7%) and free parking (3.7%).

8.40 The survey also asked all the respondents to the survey what improvements to Crowborough would potentially make them visit more often than they currently do for shopping and leisure reasons. The main responses are summarised in the table below.

Table 8.6 Suggested Improvements to Crowborough Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	60.4%	59.0%	58.6%	58.9%	29.1%	50.9%	69.5%	63.0%	75.7%	75.9%
Don't Know	23.8%	37.7%	29.9%	21.3%	9.2%	22.8%	15.4%	30.5%	23.4%	15.6%
Better access by road	0.3%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.8%	0.0%	0.9%
Better public transport	0.4%	0.4%	0.0%	0.0%	0.0%	0.8%	0.0%	1.9%	0.9%	0.7%
Free car parking	0.2%	0.0%	0.7%	0.0%	0.8%	0.0%	0.0%	0.8%	0.0%	0.0%
More / better parking	1.2%	0.0%	0.0%	4.2%	0.0%	7.4%	0.7%	0.8%	0.0%	1.5%
More / better non-food shops	5.6%	0.5%	2.1%	8.4%	22.2%	7.6%	8.8%	0.0%	0.0%	1.9%
More / better food shops	0.6%	0.5%	0.0%	0.6%	2.6%	1.0%	0.6%	0.0%	0.0%	0.0%
More national multiple shops / High Street shops	4.5%	1.2%	5.5%	7.9%	20.7%	4.0%	0.6%	1.0%	0.0%	1.5%
More clothes shops	0.4%	0.0%	0.8%	0.0%	2.4%	0.0%	0.6%	0.0%	0.0%	0.0%
More independent shops	0.7%	0.0%	0.0%	0.0%	5.9%	0.8%	0.0%	0.0%	0.0%	0.0%
More / better services	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Less charity shops	0.5%	0.0%	0.0%	1.6%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Lower business rates for shops	0.2%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Improve the environment	1.9%	0.0%	2.2%	0.6%	9.3%	6.4%	1.6%	0.0%	0.0%	0.9%

8.41 The majority of respondents could not think of any improvements that would make them visit the centre more often. Of the remainder, the highest proportion identified the need for more/better non-food shops (5.6%), followed by more multiples (4.5%). Within Crowborough's *Core Catchment Zone* (Zone 4) a higher proportion highlighted the need for more multiples (20.7%) and more/better non-food shops (22.2%). In CCZ4 respondents also identified the need for more independent shops (5.9%) and improvements to the environment (9.3%).

New Investment & Potential Development Opportunities

8.42 The Core Strategy supports *"an increase or the improvement in retail floorspace offer in the town centre to increase the retail attractiveness of Crowborough and to help consolidate the primary retail core of the town*" (bullet point 6, para 6.38). It also seeks to establish farmers' market as a central feature of the town's offer; and to improve linkages between the primary shopping core and other areas of the town, including public. We understand that the opportunities for significant new development in or on the edge of the town centre is limited and we therefore advise that the main improvements to the town centre's retail, leisure and service offer should be achieved through infill development, where possible, and by investment in the shopping environment and public realm.

Summary

8.43 In summary, the health check assessment has indicated that Crowborough is a vital and viable centre, which has shown improvements since 2008. Overall Crowborough caters for local shopping and rural catchment population with a relatively good range and choice of multiple and independent shops and other facilities typically found in a centre of its size and position in the retail hierarchy.

8.44 Notwithstanding this, we believe there is scope to improve, manage and market Crowborough's offer to a wider audience, which may attract more shoppers and visitors and make it a stronger and more viable centre.

8.45 Some of the key findings of the health check and town centre audits include the following:

- The centre has a good food/grocery provision, anchored by Waitrose, Morrisons and Lidl and complemented by a mix of smaller independent convenience stores. The larger stores generate frequent trips to the town centre and some linked expenditure to other shops and businesses across the town.
- The centre has an extensive services provision, which meets the needs of its local catchment. However it could benefit from the promotion of a stronger evening economy sector.
- The centre has a good mixture of multiple and independent retailers. However, given the nature of Crowborough we consider that to sustain its attractiveness and to compete with other nearby centres it should build on its independent offer, improving the quality and choice of provision.
- Vacancy rates in the centre are low and have fallen since 2008, which is a positive indication that market demand for representation in the town centre is strong.
- Free parking within the town centre should be maintained as it helps to attract visitors to the centre.
- The majority of the town has an attractive physical environment. However improvements to public realm, legibility and accessibility through the centre would be beneficial to the overall shopper and visitor experience. We would suggest that a centre-wide strategy is established that looks at improving signage and pedestrian flows to and across the High Street from Morrisons and Waitrose. Other initiatives would include improvement to the town centre's public realm, spaces and street furthermore, particularly between Fernbank Shopping Centre and the High Street, at Crowborough Cross.
- The Market is currently an underutilised facility, and its location, scale and quality of offer requires careful thought and attention. Improvements to the market would help to strengthen the town centre's overall attraction and performance as a shopping destination, and help it to differentiate from the high order centres. These improvements could include the relocation of the market to a more central prominent location where it will benefit from higher footfall; providing a more diverse range of food and non-food goods; introducing more niche food traders, which may appeal to visitors and residents; and increased branding and marketing.
- The market demand assessment has identified some interest from multiple retailers seeking larger format units, and the centre would therefore benefit from establishing modern larger format retail units. One option could be the reconfiguration of the Fernbank Shopping Centre, which would also help to address the quality of the shopping environment and the accessibly issues highlighted above.
- Overall we consider that our recommendations for improving the town centre are in line with '*Top of the Weald – A vision for Crowborough 2010-2030'* (May 2010).

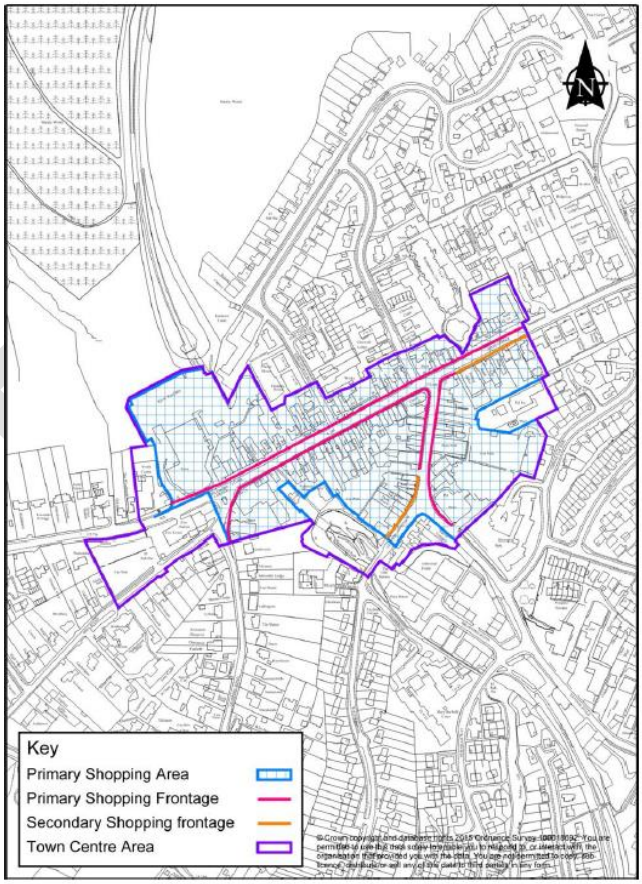
9 HEATHFIELD TOWN CENTRE – HEALTH CHECK

9.1 Heathfield is a small market town situated to the north of Hailsham, south of Crowborough and east of Uckfield. It is located near the junction of two main roads: the A267 between Tunbridge Wells and Eastbourne; and the A265 from Hawkhurst. It is almost equidistant from Tunbridge Wells and Eastbourne (approximately 16 miles).

9.2 The town's shopping offer is anchored by a Sainsbury's supermarket on Station Road and Co-op on the High Street. It acts as a service centre to a wide rural catchment, including a number of small villages and hamlets. The town centre has undergone environmental improvements in recent years that have improved its overall attraction. It also benefits from a leisure centre, a library and multi-purpose community building. The Parish Council has recently produced a vision for the town and there is an active Heathfield Partnership which promotes the area for business growth (see Section 2).

9.3 Heathfield is designated as '*Service Centre'* by the Core Strategy, at the same level as Polegate, Wadhurst and Forest Row. However the emerging Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document seeks to designate Heathfield as a *'Market Town Centre'*, which would result in it moving up to the hierarchy alongside Uckfield, Crowbrough, and Hailsham. The Wealden Local Plan *"Issues, Options and Recommendations*" (October 2015) defines the Crowborough Town Centre Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages as follows:

Figure 9.1 Heathfield Town Centre – Boundary and PSA



9.4 We will review the town's proposed boundary, PSA and frontages in more detail in our Stage 3 report after taking into account the results of the Stage 2 (Need and Demand Assessment).

Retail Composition

9.5 The composition of the centre's retail and service offer is shown in the table below, based on the Council's town centre audit undertaken in May 2015.

Table 9.1 Retail and Service Composition: number and type of units at ground floor level.[51]

	2008 [GOAD]		2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	No. Outlets	%	%
Convenience	8	8%	10	10%	8.51%
Comparison	42	42%	38	38.6%	31.97%
Services	45	45%	49	48.5%	47.62%
Vacant	4	4%	3	3%	11.35%
Total	**99**	**100%**	**100**	**100%**	**100%**

9.6 As the table shows, there are 100 outlets in Heathfield, which is lower than recorded for Crowborough (122), Uckfield (181) and Hailsham (183).

Convenience Shopping

9.7 The number of convenience goods outlets in the town has increased from 8 to 10 outlets between 2008 and 2015. The main food and convenience offer in Heathfield is anchored by Sainsbury's, Coop and Tesco Express, and this is complemented by a baker, butcher, greengrocer and wholefoods store. Current provision represents 10% of total outlets, which is above the national average of 8.57%. Its provision based on floorspace is also likely to be higher than the national average due to the presence of Sainsbury's, which replaced the former Budgens store in September 2011. Outside of the town centre there is also a popular Waitrose store on Station Road, which opened in 2015.

9.8 Heathfield performs relatively well as a food and convenience goods shopping destination, with the town centre retaining approximately 42% of the shopping trips and expenditure from within its Core Catchment Zone (Zone 2). In addition the out-of-centre Waitrose store draws 10.8% of food shopping trips and spend from within CCZ2. This represents a total retention rate of 52.8%. The majority of the trade leaking out of the CCZ2 goes to Eastbourne and Hailsham.

9.9 Given the size of the facilities, and the size and the role of the centre we consider that the convenience provision is adequate, albeit some qualitative improvements could help to improve the overall attraction of the centre.

[51] The 2008 figures are taken from Wealden District Council Interim Shopping Study 2008 (Volume 2) as produced by Chase & Partners LLP, Table 4 (as derived from Goad Centre Report and Chase & Partners' own assessment of the centre). The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. Note that the surveyed areas for 2008 and 2015 may not be identical. The national average is taken from Experian (October 2015). Figures may not sum due to rounding.

Comparison Shopping

9.10 The centre has 38 comparison units, which is fewer than Hailsham (51) and Uckfield (66), but more than Crowborough (35). The number of outlets has fallen from 42 in 2007/08 and current provision represents 38% of the total outlets in the town centre, which is significantly above the national average of 31.97%. The main comparison offer includes:

- two antique retailers;
- a book shop;
- three cards and gift shops;
- a carpet store;
- seven charity shops (indulge Oxfam, Age UK and Cancer Research UK);
- four independent fashion retailers;
- two florists;
- two Jewellers;
- two domestic appliances shops;
- an Angling shop;
- a pet shop;
- six furniture and homes improvement stores, including carpets, curtains and hardware; and
- a shoe shop

9.11 The household survey indicates that Heathfield retains approximately 16% of comparison goods shopping trips and expenditure in CCZ2, with the majority of expenditure going to the higher order centres of Eastbourne and Royal Tunbridge Wells.

9.12 Overall, we consider that Heathfield adequately meets the comparison needs of its local catchment population. The 'gap analysis has identified that surprisingly the town centre does not have a dedicated pharmacy, which may represent an opportunity to improve its immediate retail mix. There are also a relatively high number of charity shops (7) in the centre and this will need to be monitored.

Service Provision

9.13 There were 49 service businesses in Heathfield in 2015, which represented an increase from 45 units in 2007/08. Total provision represents 48.5% of total units, which is slightly above the national average of 47.93%.

9.14 In terms of **retail services**, there are 17 units in the centre which is equivalent to 17% of total units and is above the national average of 13.94%. Current provision includes nine hairdressers/beauty salons, a funeral director, a dry cleaner, a post office, a travel agent, two taxi shops, and two opticians.

9.15 Heathfield also has a relatively strong representation of **leisure services**. The 19 outlets represent 19% of total outets, which is below the national average figure of 23.35%. This category includes five cafés, seven takeaways, six restaurants and a betting shop. Overall we consider that the leisure facilities offer good value and choice, although there could be opportunities to increase the quality of the town's offer over time.

9.16 In terms of **financial and business services**, the 13 units represent 13% of total outlets which is higher than the national average of 10.64%. The main representation includes six estate agents, four banks (Barclays, Santander, Natwest Bank and Lloyds), two solicitors and a mortgage advisor.

Vacancies

9.17 The number of vacant outlets in Heathfield has fallen from four in 2008 to three in 2015. Current vacancy levels stand at 3%, which is significantly below the 2015 national average of 11.35%. The fall in vacancies and the relatively low vacancy level is a positive indication of the relative attraction and performance of the town centre.

Multiple and Independent Retail Representation

9.18 There were 32 multiple outlets in the town centre in 2015 according to the Council's audit. The main multiples are listed in the table below:

Table 9.2 Multiple Representation in Heathfield Town Centre

Barclays	Tesco Express
Santander	Sainsbury's
Natwest Bank	Age UK
Lloyds Bank	Oxfam
Costa Coffee	

9.19 The majority of the centre's retail offer comprises independent outlets (68 units) which are very popular with the local community.

9.20 Overall we consider there is good mix of multiple and independent retailers. Given the role and character of Heathfield we consider that to sustain its attractiveness and to compete with other nearby centres it should build on its independent offer, improving the quality of provision and building its niche retail offer. Although attracting key high street retailers would help Heathefield to raise its profile and attraction, this will be difficult given the draw of higher order centres (principally Easbourne and Royal Tunbridge Wells) and the limited supply of larger format units in the town centre that would meet the needs of most multiples.

Retailer Demand & Requirements

9.21 According to the latest *Requirement List* and CoStar *Requirement Report* there were three operators with requirements for representation in Heathfield in July 2016. This compares with no recorded requirements in 2007/08. Those operators reported as seeking representation in Heathfield are listed in the table below.

Table 9.3 Heathfield Town Centre – Retailer Requirements

Operator	Use Class	Size of Unit (Max)	
		Sqm	Sq ft
The Original Factory Shop	A1	1,394	15,000
Vets4Pets	D1	233	2,500
Dominos Pizza	A5	800	1,100
TOTAL		**2,427**	**18,100**

9.22 Together these three operators are seeking 2,427 sqm gross floorspace in Heathfield, which is below the levels recorded for Hailsham, Crowborough and Uckfield.

9.23 The Original Factory Shop has the largest space requirement of 1,394 sqm gross (15,000 sq ft) and it will be difficult to accommodate their needs within the town centres existing PSA without redevelopment and/or the amalgamation of adjoining units to create a larger format store.

Prime Zone A Rents

9.24 Current Information on Prime Zone A rents in Heathfield is limited due to the relatively small number of lettings/ rent reviews. Notwithstanding this, our discussions with local agents indicate that rental levels are approximately £30 per sqft, which is higher than the £27 per sqft recorded in 2007/08.

Street Market

9.25 Heathfield Farmers' Market operates every third Saturday of every month in the Co-Op Car Park from 9am - 12.30pm. We understand that the Coop supermarket gives the space free of charge. There are normally 15 stalls selling a wide range of goods, including vegetables, fruit, meat, cheese, cakes, preserves, bread, olives, plants and flowers. However, we have been informed that in recent years the number of market stalls has fallen.

9.26 The market benefits from repeat business, with regular customers coming each month but struggles to attract new customers. As a result the market is not very busy with a “trickle” of people coming throughout the day. As a result we understand that the market is currently running at a loss. In response the market management is trying to attract more art and crafts vendors, although this will require an in-door/covered facility. The market management is also undertaking an extensive advertising / marketing campaign to attract new visitors.

9.27 Based on our understanding of the operation of the market and its stalls, it is clearly an important part of the overall town centre’s offer and attraction as a shopping location. In order to maintain and enhance the market we advise that opportunities should be considered to relocate it to a more central location, where it will have a higher profile and visibility. However the centre currently does not have the space to accommodate the market, without reconfiguration and/or major redevelopment. Although we understand that the market management is currently looking at other potential (indoor) venues for relocation (including the Youth Centre or the Kings Church), the stall holders have not particularly welcomed this option and would prefer to remain in the Co-op car park.

Accessibility & Pedestrian Flows

9.28 Heathfield is highly accessible by car and it has over 600 free car parking spaces in the town centre, with over half of these located adjacent to the Co-op supermarket. We consider that the free parking is one of the key attractions of the town, allowing it to compete for customers against bigger centres. We note however that the on-street parking can “clog-up” the streets and cause congestion. Given that the centre consist of just two streets, it is very easy to navigate by pedestrians and the flow is maximised across the centre

Environmental Quality

9.29 Heathfield has a pleasant environment. The centre benefits from well-maintained street paving and the hanging baskets add to the centre's overall attraction. It has a number of attractive buildings, the majority of which are of similar architectural style. The majority of fascias/frontages are well maintained, which makes a positive contribution to the overall shopping environment. However there are also some poorer quality less attractive buildings that detract from the overall environment in our view. The centre also lacks public open space or a square that would help to provide a focus for shoppers and visitors.

Customer Perceptions

9.30 The household survey asked those respondents who visit Heathfield for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 9.4 What people like about Heathfield Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	13.2%	10.9%	10.6%	26.1%	3.5%	12.9%	15.9%	11.0%	7.0%	17.1%
Attractive environment / nice place	10.0%	17.5%	8.3%	7.4%	17.0%	0.0%	31.8%	0.0%	0.0%	7.1%
Convenience to home, work, etc.	27.6%	1.8%	60.7%	10.6%	3.5%	11.8%	17.4%	0.0%	52.4%	20.2%
Easy to get to by bus	0.4%	0.0%	0.0%	0.0%	0.0%	11.8%	0.0%	0.0%	0.0%	1.1%
Easy to get to by car	0.3%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to park	4.7%	2.0%	8.3%	2.3%	6.4%	11.8%	0.0%	6.8%	0.0%	2.7%
Free parking	4.4%	2.0%	10.4%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
The market	2.6%	6.1%	0.0%	0.0%	3.2%	11.8%	15.9%	0.0%	7.0%	2.4%
Good food stores	8.8%	10.2%	10.5%	6.2%	3.2%	0.0%	0.0%	5.8%	0.0%	12.0%
Good pubs, cafés or restaurants	3.1%	0.0%	2.6%	6.2%	3.2%	0.0%	0.0%	18.8%	0.0%	2.5%
Good range of non-food shops	20.7%	30.3%	13.2%	18.1%	29.8%	11.8%	17.4%	16.3%	9.0%	25.9%
Good range of independent shops	17.4%	15.7%	15.5%	35.6%	21.4%	24.7%	0.0%	35.5%	7.7%	9.8%
Good range of 'high street' retailers/ multi	2.5%	2.3%	0.7%	0.0%	9.3%	0.0%	0.0%	0.0%	10.0%	3.6%
High quality shops	1.4%	3.9%	1.4%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Quiet	1.0%	0.0%	2.5%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nice antique shops	0.9%	1.8%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
The Cuckoo Trail	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Friendly atmosphere	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	2.4%
Nice for a change of scenery	1.4%	3.8%	0.0%	0.0%	9.3%	0.0%	0.0%	0.0%	0.0%	0.0%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

9.31 As the table shows, some 13.2% could not think of anything they specifically like about the centre. Of the remainder, the highest proportion identified the fact that it is convenient to where they live or work (27.6%). Not surprisingly this rose to 60.7% in Heathfield's *Core Catchment Zone* (Zone 2). Respondents also highlighted that the centre has a good choice of non-food shops (20.7%), independent shops (17.4%) and food shops (8.8%). Other key attractors include the nice environment (10%); and convenient (4.7%) and free parking (3.7%).

9.32 The survey also asked all respondents what improvements to Heathfield would potentially make them visit more often than they currently do for shopping and leisure reasons. The main responses are summarised in the table below.

Table 8.6 Suggested Improvements to Heathfield Town Centre

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	61.3%	61.6%	29.9%	66.6%	56.4%	42.4%	77.9%	61.5%	74.7%	57.5%
Don't Know	25.9%	34.0%	3.2%	24.0%	35.1%	56.1%	20.1%	30.9%	18.4%	17.1%
Better access by road	0.2%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Better public transport	0.5%	0.0%	0.8%	0.0%	0.0%	0.0%	0.6%	0.0%	0.9%	2.2%
Free car parking	0.7%	0.4%	1.7%	0.6%	0.8%	0.0%	0.0%	1.6%	0.0%	2.3%
More / better parking	2.7%	0.4%	8.4%	2.6%	3.2%	0.8%	0.0%	1.8%	6.0%	3.9%
More / better non-food shops	2.6%	2.0%	12.1%	4.2%	0.7%	0.0%	0.7%	3.4%	0.0%	1.7%
More / better food shops	1.3%	0.0%	10.2%	0.7%	0.0%	0.0%	0.7%	0.0%	0.0%	2.1%
More national multiple shops / High Street	1.7%	0.4%	7.5%	0.6%	0.0%	0.0%	0.7%	1.8%	0.0%	7.0%
More clothes shops	0.5%	0.0%	3.5%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
More independent shops	0.3%	0.0%	2.8%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
More / better services	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Less charity shops	0.5%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%
More / better places for eating out (e.g. caf	0.5%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Improve the environment	0.7%	0.5%	5.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%

9.33 The majority of respondents could not think of any improvements. Of the remainder, the highest proportion identified the need for more/better parking (2.7%) and more/better non-food shops (2.6%). In CCZ2 a higher proportion referred to the need for more/better non-food shops (12.1%) and food shops (10.2%), followed by more/better parking (8.4%) and more multiples (7.5%).

New Investment & Potential Development Opportunities

9.34 The WLP IOR seeks to establish 800 additional residential units in Heathfield. This may put more pressure on the centre, meaning that it will need to ensure it can still cater adequately for its local population. An increase or improvement in the retail floorspace offer in the town centre may be required, but this is subject to the findings of the Stage 2 (Need and Demand Assessment) Report.

Summary

9.35 We consider Heathfield is a relatively healthy and viable centre, and is performing well against most of the health check performance indicators. The key findings and recommendations are summarised below:

- Heathfield has a good food and convenience provision, anchored by Sainsbury's and Co-op in the town centre. The out-of-centre Waitrose is also a popular food shopping destination since it opened in 2015.
- The comparison goods offer is limited and mainly caters for the day-to-day needs of the local population. Attracting key high street retailers and increasing the comparison goods offer in general would help Heathfield raise its profile.
- Overall there is a good mix of multiple and independent retailers. Heathfield should build on its independent offer, improving the quality of provision and building its more specialist retail offer.
- The centre has a relatively pleasant environment, and benefits from good accessibility, free car parking and easy pedestrian movement.
- Vacancy levels are low, and there is demand from retailers for representation in the town centre. However the lack of larger format units to meet this demand is an issue for Heathfield and the District's other main centres.

- The centre lacks focus and would benefit from public open space.
- It would be highly beneficial to the centre's overall vitality and viability to ensure the future success and attraction of the market. This could include increasing the number of stalls and improving the range and quality of the products sold. Opportunities to relocate the market to a prominent/visible location in the town centre should be explored as this will help to attract more customers/visitors to the town, combined with better marketing and more targeted events.

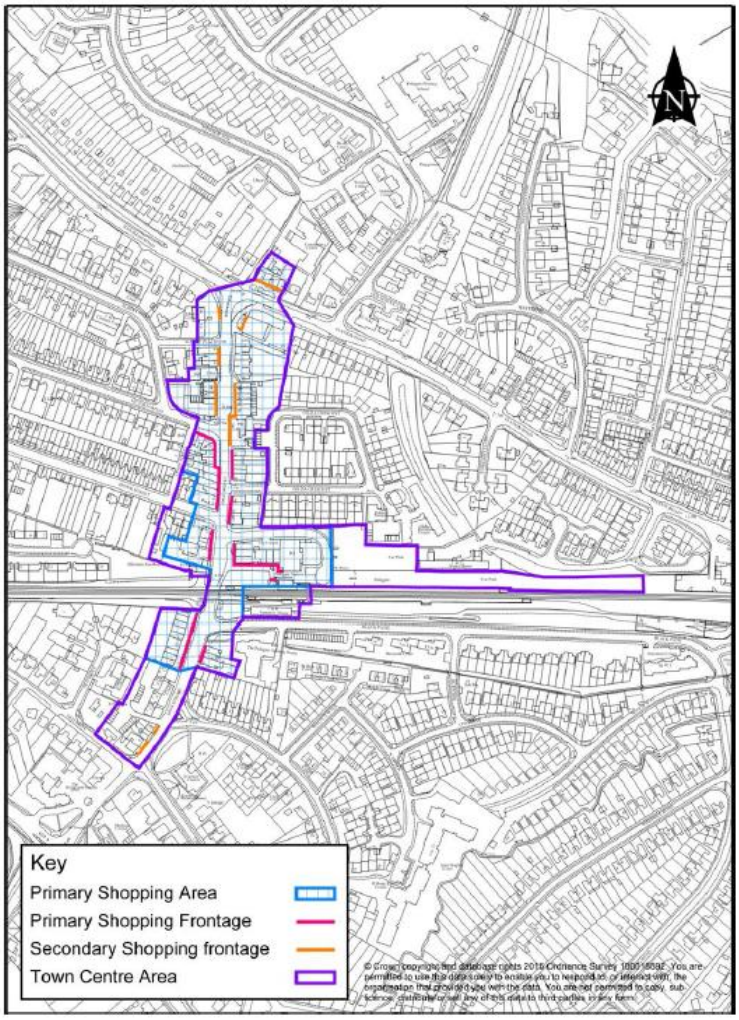
10 POLEGATE DISTRICT CENTRE – HEALTH CHECK

10.1 Polegate is a small settlement focussed around the railway station. It has a limited range of shops and services focussed on the linear High Street and around the station. However, the High Street is bisected by the railway line and level crossing, and pedestrian flow around the centre is affected by frequent barrier closures.

10.2 The centre sits in the shadow of Hailsham's catchment and the higher order centre of Eastbourne, and mainly serves the day-to-day shopping, service, leisure and community needs of its local catchment population, and commuters who use the railway station. This is reflected by its designation as a '*Service Centre*' by the Core Strategy (2013), and as a '*Primary District Centre*' by the emerging Wealden Local Plan *"Issues, Options and Recommendations*" (October 2015) consultation document. It is placed below Hailsham, Uckfield, Crowborough and Heathfield in the retail hierarchy, and at the same level as Forest Row and Wadhurst.

10.3 The Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document defines the Polegate Town Centre Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below).

Figure 10.1 Polegate Town Centre – Boundary and PSA



Retail Composition

10.4 Based on the Council's town centre audit undertaken in May 2015, the composition of the centre's retail and service offer is summarised in the table below.

Table 10.1 Retail and Service Composition: number and type of units at ground floor level.[52]

	2008 [GOAD]		2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	No. Outlets	%	%
Convenience	*6*	*12%*	*7*	*11%*	*8.51%*
Comparison	*20*	*41%*	*17*	*27%*	*31.97%*
Services	*23*	*47%*	*37*	*59%*	*47.62%*
Vacant	*0*	*0%*	*2*	*3%*	*11.35%*
Total	**49**	**100%**	**63**	**100%**	**100%**

10.5 As the table shows, there are currently some 63 outlets in Polegate, which represents an increase from 48 recorded in 2008. This increase is probably due to the different areas audited by Experian Goad in 2008 and by the Council in its May 2015 audit. In terms of its number of units, Polegate is significant smaller than the District's '*Main Market Towns'* of Uckfield, Hailsham and Crowborough.

Convenience Shopping

10.6 The number of convenience goods outlets in the town has increased from six to seven between 2008 and 2015. Current provision represents 12% of total outlets, which is above the national average of 8.57%. The main provision in the centre includes the Coop (located outside of the train station and hosting a Post Office), One Stop and Millfields convenience stores, along with three newsagents and a greengrocer (Polegate Fruiterers). These shops mainly to cater for the day-to-day 'top up' food and convenience shopping needs of the immediate local population and commuters using the railway station. In general terms we consider this level of provision is appropriate for a centre of its size.

Comparison Shopping

10.7 There are 17 comparison units in Polegate and the offer has decreased from 20 in 2007/08. This represents 27% of total units in the centre and is below the national average of 31.97%. The current offer includes:

- a pharmacy;
- a florist;
- a pet shop;
- three specialist retailers (selling workwear, airguns and a mobility store);
- three charity shops;
- an antique shop;
- a computer store;
- a cycle store;
- three home improvements stores (selling DIY, carpets and interiors); and

[52] The 2008 figures are taken from Wealden District Council Interim Shopping Study 2008 (Volume 2) as produced by Chase & Partners LLP, Table 4 (as derived from Goad Centre Report and Chase & Partners' own assessment of the centre). The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. Note that the surveyed areas for 2008 and 2015 may not be identical. The national average is taken from Experian (October 2015).

- a Gift/Card Shop.

10.8 Polegate's offer meets the basic comparison needs of the local population, as well as catering for the more specialist needs of a wider catchment population.

Service Provision

10.9 There are 37 units in Polegate within the services category, and this has increased significantly from 23 in 2007/08. Current provision represents 59% of total units, which is significantly above the national average of 47.93%. Given the role and function of the centre, the domination of the services outlets is to be expected.

10.10 In terms of **retail services**, the Council's audit indicates there are 17 units. This represents 11% of total units in the centre, which is below the national average of 13.94%. The main provision in this category include includes seven hairdressers/beauty salons, two funeral directors, a travel agent, opticians, a taxi shop and a car repair business.

10.11 Polegate also has a relatively strong representation of **leisure services**, with 14 outlets in total. This is equivalent to 22.22% of total outlets and is slightly below the national average of 23.35%. This category includes five (Class A3) cafés, five (Class A5) takeaways, a restaurant (which also does takeaway), two pubs (including a Harvester) and a betting shop.

10.12 In 2015 there were 10 **financial and business services**, which is equivalent to 15.9% of total units and is significantly higher than the national average of 10.64%. The main provision comprises six estate agents, two banks (Barclays and Lloyds), an insurance provider and a solicitor. We note however that Barclays has since closed their outlet in Polegate.

Vacancies

10.13 The Council's 2015 audit identified two vacant units in the centre, and this was confirmed by our visit and audit of the centre in July 2016. The two vacant units are 87A High Street, adjacent to the Peony Gardens takeaway unit, and 44 High Street which was occupied by Barclays Bank. The vacancy level of 3% is well below the national average of 11.15%, which suggests the centre is performing well and has weathered the impact of the economic downturn since 2008.

Multiple and Independent Retail Representation

10.14 In 2015 the centre had approximately 21 multiple outlets. This has reduced to 20 following the closure of Barclays Bank. The main multiples in the centre include Lloyds Bank, Fox and Sons Estate Agent, Coop, Coop Funeral Care, Harvester, Lloyds Pharmacy and One Stop. There majority of the centre is therefore occupied by independent businesses (40 units). This limited multiple provision and stronger independent offer is to be expected given the role and function of Polegate in the District's retail hierarchy, and the attraction of higher order centres in close proximity, principally Eastbourne and Brighton.

Accessibility & Pedestrian Flows

10.15 Polegate is strategically located on the A22/A27 primary and trunk routes. It is highly accessible by car and has good public transport links, principally the railway station located adjacent to the High Street. In terms

of car parking, there are spaces to the rear of the Co-op food store and on-street parking on the High Street. The centre is linear and small, and is therefore easy to navigate. However, the railway level crossing does act as a barrier to pedestrian flow.

Environmental Quality

10.16 Polegate has an average environment in our view based on our site visits and audit of the centre. It appears well keep in terms of street cleanliness, and some buildings have attractive frontages. However the centre does not have many buildings of high architectural quality, and many retail units have poor facades and frontages that would benefit from investment.

10.17 In terms of its public realm, the public space outside the train station does acts a meeting point, albeit it lacks character and visual appeal and hence does not unitise its full potential. Public realm, such as pavements surface and street furniture, is also in need of maintenance and improvement.

10.18 In summary, we believe the centre would benefit from improvements to its shop frontages in some cases, along with its public realm and street furniture. Furthermore there would appear to be opportunities to reconfigure/ improve existing buildings, especially around the train station, to achieve higher quality design and to improve the centre's overall attraction.

Customer Perceptions

10.19 The household survey asked those respondents who visit Polegate for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 10.2 What people like about Polegate

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / very little / do not know	31.0%	54.9%	30.4%	50.0%	0.0%	0.0%	0.0%	0.0%	25.9%	0.0%
Attractive environment / nice place	3.5%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%
Close to home/work/other	26.3%	5.6%	0.0%	0.0%	0.0%	0.0%	50.0%	100.0%	33.4%	0.0%
Compact	4.5%	6.6%	39.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%
Easy to get to by bus	1.2%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to get to by car	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%
Easy to get to by train	1.4%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to park	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
The railway station	7.4%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%
Good food stores	1.1%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good pubs, cafés or restaurants	3.1%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Good range of non-food shops	2.9%	5.1%	30.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Good range of independent shops	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%
Good range of 'high street' retailers/ multiples	0.5%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Quiet	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%
Can get everything you need there	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Friendly atmosphere	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
Garden centre	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%
Good charity shops	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Good hardware / DIY store	1.2%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

10.20 As the table shows, some 31% of respondents could not think of anything they specifically like about the centre. Of the remainder, the highest proportion identified the fact that it is convenient to where they live or work (26.3%). The centre's other key attractors include the railway station (7.4%); easy access by car (7.4%); and the fact that it is "quiet" (7.4%).

10.21 The survey also asked all respondents what improvements to Polegate would potentially make them visit more often than they currently do for shopping and leisure reasons. All the responses are set out in the table below.

Table 10.3 Suggested Improvements to Polegate

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	59.0%	55.8%	61.8%	51.4%	53.1%	36.8%	75.3%	63.4%	49.5%	75.7%
(Don't know)	32.1%	33.1%	29.3%	47.9%	46.9%	62.4%	23.3%	34.7%	9.0%	16.4%
More / better non-food shops	3.0%	3.4%	2.2%	0.7%	0.0%	0.0%	0.0%	1.9%	12.7%	5.5%
More national multiple shops / High Street sh	2.3%	4.9%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	9.4%	0.0%
More / better parking	1.3%	1.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	8.5%	0.0%
Better access by road	0.8%	0.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%
More / better food shops	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%
Bank / post office	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%
Better public transport	0.3%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.5%
Make it look more attractive	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%
Free car parking	0.3%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Facilities which would assist you if shopping w	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%
More advertising	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
More / better places for eating out (e.g. cafes	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
More / better services	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.7%	0.0%
Make it feel more like a local village communi	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Less empty shops	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
More independent shops	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better entertainment	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
More / better public conveniences	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Less charity shops	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Cleaner streets	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Better park	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Fabric / sewing shop	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Less house building	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Improved access for people with pushchairs	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%

10.22 The majority of respondents could not think of any improvements. Of the remainder, the highest proportion identified the need for more/better non-food shops (3%) and multiples (2.3%), followed by more/better parking (1.3%). In Polegate's *Core Catchment Zone* (Zone 8) a higher proportion highlighted the need for more/better non-food shops (12.7%), more multiples (9.7%) and more/better parking (8.5%).

Summary

10.23 Polegate preforms the role and function of a District Centre in Wealden's retail hierarchy. It appears to be performing relatively well based on a number of key indicators; it has just two vacant units, is accessible by different modes, has good parking provision and its linear High Street is easy to navigate. Its overall vitality and viability is underpinned by it local shops and services that meet the day-to-day needs of its local catchment population, and those using the railway station.

10.24 In our judgement the overall number of mix of uses in the centre adequately meets the basic needs of the immediate local population, although there is the potential to improve the quality of its convenience offer. In

our view the centre also lacks character and identity, and would benefit from improvements to the public realm and buildings facades/shop frontages.

10.25 Notwithstanding this, it will be important to assess the impact the proposed population growth on the centre and what opportunities may exist to positively act on this change. This is considered in more detail in the Stage 2 and 3 Reports.

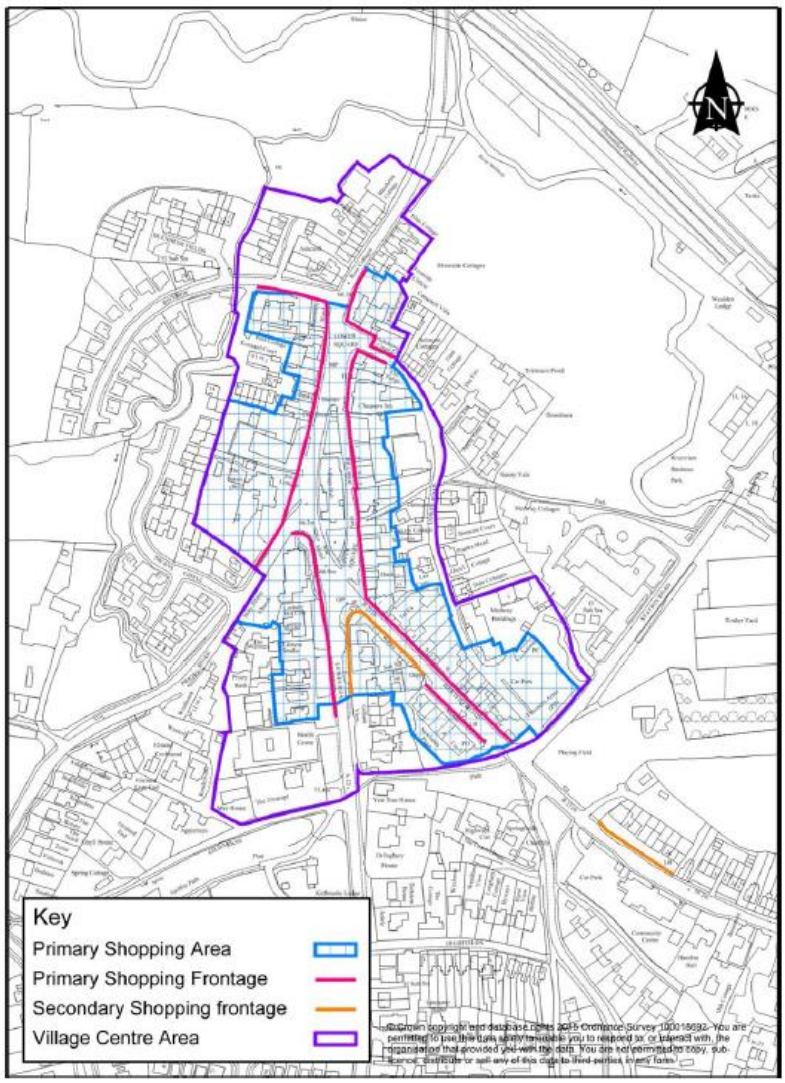
11 FOREST ROW DISTRICT CENTRE – HEALTH CHECK

11.1 Forest Row is a small village located in the north west of the District, approximately four miles south east of East Grinstead. The village centre is primarily focused along the main Lewes Road, which is the A222 through route towards East Grinstead. Part of the town centre also extends along Hartfield Road, and the Village Hall which sits on an island between the Lewes Road and Hillside/Upper Square.

11.2 Forest Row is designated as a '*Service Centre*' by the Core Strategy (2013), and as a '*Primary District Centre*' by the emerging Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document. It is placed below Hailsham, Uckfield, Crowborough and Heathfield in the retail hierarchy, and at the same level as Forest Row and Wadhurst.

11.3 The Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document defines Heathfield Town Centre's Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below).

Figure 11.1 Forest Row Village Centre – Boundary and PSA



Retail Composition

11.4 Based on the Council's town centre audit undertaken in May 2015, the table below summarises the composition of the centre's retail and service offer. It should be noted that there is no comparable information available from the *Wealden Interim Shopping Study 2008* (October 2008) to help inform changes in the centre's retail composition over the last eight years.

Table 11.1 Retail and Service Composition: number and type of units at ground floor level.[53]

	2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	%
Convenience	7	10.6%	8.51%
Comparison	22	33.3%	31.97%
Services	33	50.0%	47.62%
Vacant	4	6.06%	11.35%
Total	**66**	**100%**	**100%**

11.5 As the Council's audit shows, there are current 66 outlets in Forest Row, which is more than Polegate (63).

Convenience Shopping

11.6 There are seven convenience goods outlets in the town according to the Council's audit. This represents 10.6% of total outlets, which is above the national average of 8.57%. The main food and convenience provision includes a Tesco Express, Co-op supermarket, a wine merchant, two greengrocers, a fishmonger and a delicatessen. These facilities cater for the basic convenience needs of the immediate local population, and we consider that the current provision is good for a centre of its relative size and function in the retail hierarchy.

Comparison Shopping

11.7 Forest Row has some 22 comparison units, which is equivalent to 33.3% of total outlets and is above the national average of 31.97%. The 2015 offer includes a variety of comparison retailers, including:

- two antique retailers;
- art shop;
- four independent fashion retailers;
- a charity shop;
- four electrical/hardware stores;
- a pharmacy;
- a pet shop;
- four furniture and homes improvement stores, including carpets, curtains and hardware; and
- two gift shops.

11.8 This mix of comparison goods shops serves the basic needs of the local population, and is considered to be more than adequate for a centre of its size, role and function in the hierarchy.

[53] The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. The national average is taken from Experian (October 2015).

Service Provision

11.9 There are 33 service businesses in Forest Row based on the Council's audit. This represents 50% of total units and is above the national average of 47.93%.

11.10 In terms of **retail services** there are 11 units, which is equivalent to 16.6% of total units and is above the national average of 13.94%. The main provision in this category includes four hairdressers, two funeral directors, a dry cleaner, a post office, a travel agent, a bicycle hire shop and an alternative medicine centre.

11.11 Forest Row also has a strong representation of **leisure services**, with 15 outlets in total. This represents 22.7% of the total units, which is above the national average of 23.35%. This category includes three cafés, two takeaways, six restaurants and four pubs/bars/brewery house. Overall the mix and quality of leisure facilities in the centre is good.

11.12 In 2015 there were seven **financial and business services**, which was equivalent to 10.6% of total outlets and broadly in line with the national average of 10.64%. The main services in this category include five estate agents, a mortgage advisor and a solicitor. We note that the centre does not have a bank.

11.13 Overall the provision and mix of service businesses in the centre is good, and meets the day-to-day needs of its local catchment population.

Vacancies

11.14 The Council's 2015 audit recorded four vacant units in Forest Row. This is equivalent to a vacancy level of 6.06%, and is significantly below the national average of 11.35% in 2015. We consider this to be a healthy position.

Multiple and Independent Retail Representation

11.15 There are six multiple outlets in Forest Row; namely Coles and Winkworth Estate Agents, the Co-op, Post Office, Tesco Express and Lloyds Pharmacy. The centre's offer mainly comprises independent businesses, which is to be expected for a centre of its size and role. The majority of the independent retailers appear to be doing well, providing good quality goods and service. They will also have a strong local customer base and loyalty. Maintaining and building on the independent offer, improving the quality of provision and building its niche market will be key for Forest Row's continued success as a shopping, service and leisure destination.

Street Market

11.16 Forest Row Village Market operates from Foresters Green, Hartfield Road every first Saturday of every month from 10am-3pm, and is served by free parking. There are approximately 50 regular stalls with the capacity for 60; although the representation of stalls varies depending on the time of the year. These stalls sell fine foods and crafts and the market is very popular and profitable, attracting between 1,000 and 2,000 visitors on market day. In 2016 it was nominated of the *Farmers Market of The Year Award* and is currently in the top 10 contestants. Overall the market forms an important part of Forest Row's retail offer and is an important focus for the local community and wider catchment.

Accessibility & Pedestrian Flows

11.17 The village is served by three bus routes. Off-street car parking is limited to 60 spaces, meaning that parking can be a challenge, particular on popular market days. However the centre is very compact and easy to navigate through; albeit the pavements are very narrow.

Environmental Quality

11.18 Forest Row has a pleasant and attractive environment, with good legibility. The village hall is located at the centre of the village and has a distinctive style and architecture, and acts as a landmark and a gateway. The centre benefits from a relatively well maintained street paving, albeit we understand due to high water runoff levels the roads tend to get eroded quite quickly and hence management is required.

11.19 The centre also has a number of attractive buildings with a variety of architectural style. Generally, the majority of fascias/frontages are well maintained and contribute to the attractive shopping environment. However poorer quality, less attractive, buildings are also present.

11.20 In our judgement the on-street parking does detract from the overall appearance of the centre, creating a crowded effect. Better parking facilities would therefore help to improve this situation.

Customer Perceptions

11.21 The household survey asked those respondents who visit Forest Row for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

Table 11.2 What people like about Forest Row

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	17.2%	0.0%	50.0%	46.7%	11.1%	10.5%	14.5%	22.9%	0.0%	100.0%
Attractive environment / nice place	24.2%	15.4%	0.0%	20.2%	54.7%	55.5%	20.9%	20.8%	0.0%	0.0%
Convenience to home, work, etc.	26.5%	6.5%	0.0%	5.7%	11.1%	15.2%	35.8%	26.4%	50.0%	0.0%
Easy to park	2.5%	0.0%	0.0%	0.0%	0.0%	5.3%	3.7%	0.0%	0.0%	0.0%
Free parking	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Good food stores	5.9%	0.0%	0.0%	5.7%	0.0%	6.8%	8.2%	0.0%	0.0%	0.0%
Good pubs, cafés or restaurants	15.2%	55.5%	0.0%	10.5%	26.7%	5.8%	9.3%	35.5%	0.0%	0.0%
Good range of non-food shops	5.5%	0.0%	0.0%	0.0%	6.5%	0.0%	6.3%	26.4%	0.0%	0.0%
Good range of independent shops	16.6%	63.9%	0.0%	21.1%	10.6%	0.0%	12.3%	11.7%	50.0%	0.0%
Good range of 'high street' retailers/ multipl	1.5%	0.0%	0.0%	4.8%	5.6%	0.0%	0.9%	0.0%	0.0%	0.0%
Affordable shops	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
High quality shops	2.2%	0.0%	0.0%	0.0%	0.0%	6.8%	1.9%	18.2%	0.0%	0.0%
The market	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Good facilities	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%
Good library	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
The Poohsticks Bridge	0.4%	0.0%	23.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Veasey & Sons Fishmongers	1.4%	0.0%	0.0%	8.8%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Can get everything you need there	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%
Friendly atmosphere	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

11.22 As the table shows, some 17.2% of respondents could not think of anything they specifically like about the centre. Of the remainder, the highest proportion identified the fact that it is convenient to where they live or work (26.5%), followed by its nice environment (24.2%), good choice of independent shops (16.6%) and places to eat and drink (15.2%). The centre's independent shops, cafés, restaurants and bars were particularly popular with respondents living in Zones 1, 3, 4, 6 and 7.

11.23 The survey also asked all respondents what improvements to Forest Row would potentially make them visit more often than they currently do for shopping and leisure reasons. All the responses are set out in the table below.

Table 11.3 Suggested Improvements to Forest Row

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	63.0%	58.5%	67.2%	62.2%	55.5%	37.6%	65.2%	67.3%	69.1%	80.7%
Don't Know	31.1%	40.2%	31.3%	34.9%	40.6%	56.8%	10.0%	25.8%	30.0%	17.8%
Better access by road	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	3.4%	0.0%	0.0%
Better public transport	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Free car parking	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better parking	2.6%	0.4%	0.0%	1.8%	3.1%	0.0%	10.7%	5.0%	0.0%	0.0%
More / better non-food shops	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.9%	0.0%
More / better food shops	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%
More national multiple shops / High Street shops	0.9%	0.0%	0.0%	0.0%	1.7%	5.6%	1.5%	1.9%	0.9%	0.0%
More clothes shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More independent shops	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
More / better services	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Less charity shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better places for eating out (e.g. cafes and res	0.2%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Improve the environment	0.7%	0.0%	0.0%	1.7%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%

Notes: Multiple responses.

11.24 The majority of respondents could not think of any improvements. Of the remainder, a small proportion identified the need for more/better parking (2.6%). Overall respondents appear to be generally satisfied with Forest Row as a place to shop and visit for a range of leisure uses.

Summary

11.25 In summary we consider Forest Row is a relatively healthy and viable village centre, and is performing well against many of the health check key performance criteria. The key findings are summarised below:

- Forest Row is well served in terms of its retail and service offer, and predominantly meets the day-to-day needs of its local catchment population.
- Its retail mix is largely dominated by popular independent and specialist retailers, which also draw shoppers and visitors from further afield for specific purchases. We advise that Forest Row should build on its independent offer, improving the quality of provision and building its niche retail offer.
- The centre has a popular and profitable market, which is an important part of its overall offer. It should be managed and marketed proactively to enable it to grow and flourish.
- Forest Row has a relatively pleasant environment, with good accessibility; albeit there is a need to improve parking provision.
- Vacancy levels are low. This is a good sign of the performance of existing shops and services, and the demand for space where vacancies do occur.

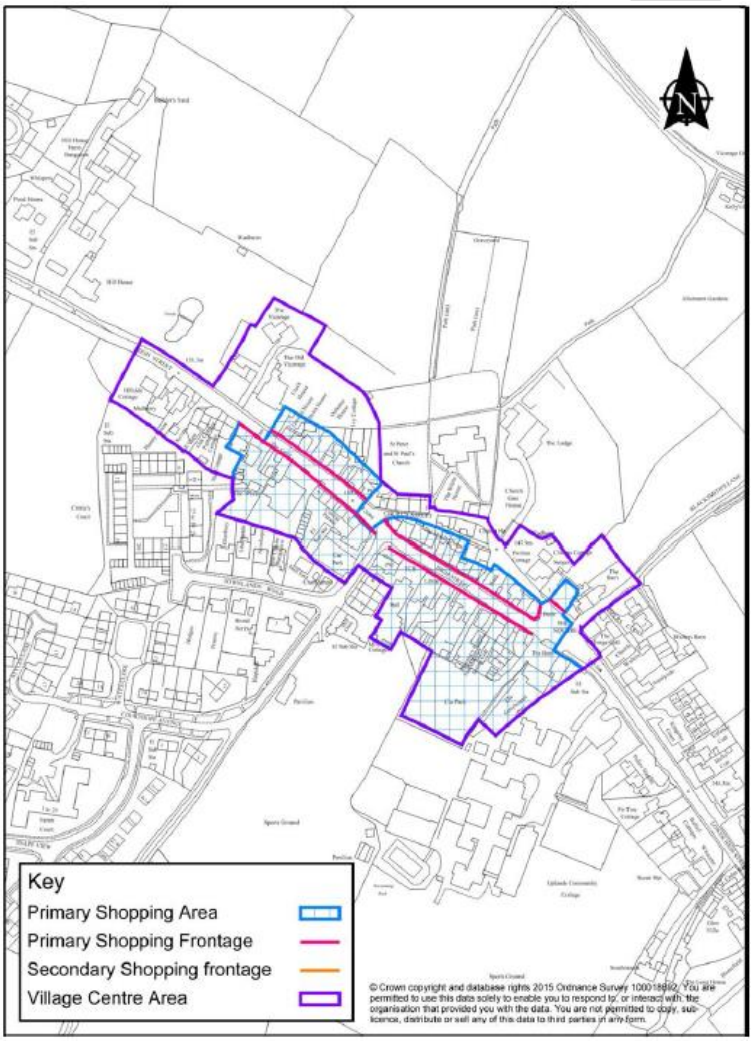
12 WADHURST DISTRICT CENTRE – HEALTH CHECK

12.1 Wadhurst is a historic market town located in the north-east of the District, approximately seven miles to the south-east of Royal Tunbridge Wells. It is a smaller sized linear centre focused along the traditional High Street, the main A266 road through the village, and extends from the Square in the south-east to the Vicarage in the north-west.

12.2 It is designated as a '*Service Centre*' by the Core Strategy (2013), and as a '*Primary District Centre*' by the emerging Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document. It is placed below Hailsham, Uckfield, Crowborough and Heathfield in the retail hierarchy, and at the same level as Forest Row and Polegate.

12.3 The Wealden Local Plan *"Issues, Options and Recommendations*" (WLP IOR, October 2015) consultation document defines Wadhurst Town Centre's Boundary and Primary Shopping Area (PSA), along with Primary and Secondary Shopping Frontages (see figure below).

Figure 12.1 Wadhurst Village Centre – Boundary and PSA



12.4 We will review the town's proposed boundary, PSA and frontages in more detail in our Stage 3 report after taking into account the results of the Stage 2 (Need and Demand Assessment).

Retail Composition

12.5 The table below summarises the composition of the centre's retail and service offer based on the Council's 2015 Town Centre Audits. It should be noted that there is no comparable information available from the *Wealden Interim Shopping Study 2008* (October 2008) to help inform changes in the centre's retail composition over the last eight years.

Table 12.1 Retail and Service Composition: number and type of units at ground floor level.[54]

	2015 [LPA Audit]		2015 GOAD National Average
	No. Outlets	%	%
Convenience	7	15.6%	8.51%
Comparison	12	26.7%	31.97%
Services	26	57.8%	47.62%
Vacant	0	0%	11.35%
Total	**45**	**100%**	**100%**

12.6 As the table shows, there are 45 outlets in Wadhurst, which is below the provision in Forest Row (66) and Polegate (63).

Convenience Shopping

12.7 There are seven food and convenience goods outlets in the town; representing 15.6% of total outlets, which is above the national average of 8.57%. This provision includes a One Stop Convenience Store, along with a butcher, baker, wholefoods store, greengrocer and a wine merchant. These facilities cater for the basic day-to-day convenience needs of the immediate local population, and we consider these to be adequate.

Comparison Shopping

12.8 The centre has 12 comparison units. This represents 26.7% of total provision and is above the national average of 31.97%. The 2015 offer includes a variety of comparison retailers, including:

- an Art shop/gallery;
- two independent fashion retailers;
- two charity shops;
- two electricals and hardware stores;
- a pharmacy;
- two gift shops;
- a florist; and
- a furniture shop.

12.9 Together these non-food retailers serve the basic needs of the local population, and we believe it is more than adequate given the size of the centre and its position in the District's retail hierarchy.

[54] The 2015 figures are taken from Wealden District Council's own audit of the centre, May 2015. The national average is taken from Experian (October 2015).

Service Provision

12.10 There were 26 service businesses in Wadhurst in 2015. This represented 57.8% of total provision and is significantly above the national average of 47.93%.

12.11 There at ten outlets in the **retail services** category, which is equivalent to 22.2% of total provision and is significantly above the national average of 13.94%. The main provision in this category includes six hairdressers/ beauty parlour, a dry cleaner, a post office, a travel agent and an optician.

12.12 Wadhurst has eight outlets in the **leisure services** category. This includes two cafés, two pubs, two restaurants, a takeaway and a hotel. Current provision represents 17.8% of the total outlets which is below the national average of 23.35%. Overall we consider that the leisure facilities are of high quality, but the centre could benefit from a few more businesses in this sector.

12.13 In 2015 **financial and business services** accounted for eight units in the centre. This was equivalent to 17.8% of total outlets, which is much higher than the national average of 10.64%. The main provision in this sector comprises two banks (Natwest and Lloyds), five estate agents, an accountant and an insurance advisor.

12.14 Overall we consider that the level of service provision in Wadhurst is adequate and in line with its relative role and function in the District's retail hierarchy.

Vacancies

12.15 Wadhurst had no recorded vacancies in 2015, indicating that the centre is healthy and viable.

Multiple and Independent Representation

12.16 The centre's retail and service offer is dominated by independent businesses. The main multiples in the centre are a Natwest Bank, Lloyds Bank, One Stop and the Post Office. The majority of the independent businesses appear to be doing well, providing a good choice and quality of goods and service. Maintaining and building on the independent offer, improving the quality of provision and building its niche market will be key to Wadhurst's success.

Street Market

12.17 Wadhurst's Farmers and Crafts Market comprises between 15-30 market stalls and operates from Commemoration Hall between 9.30am-12.30pm every third Saturday of each month. It sells fresh local produce, home baked goods and local art and craft. We understand that the market management has a strict selection for stall holders, making sure there is a good variety and a mix of goods sold. We understand that the market is performing well. It has a good atmosphere, is usually very busy and is very popular with the local community. It also draws visitors from outside the area, as a result of people driving through and seeing the advertisement signs. The market management keeps an up to date Facebook page with the latest news, seeking to promote the market. It has 191 "likes" and a 4.5 star rating.

Accessibility & Pedestrian Flows

12.18 The village is served by on-street parking, and there is a free public car park available at the back of the Greyhound Inn (St James Square) which has both long stay (52 space) and short stay (30 spaces) spaces. We understand that parking is relatively easy in the village, albeit sometimes it can take time to find a space. The village centre is also served by two buses linking it to other centres, such as Royal Tunbridge Wells.

12.19 Pedestrian accessibly to the centre is adequate, although we understand that there have been complaints about narrow pavements and parked cars inhibiting pedestrian flow. However the centre is compact, legible and easy to navigate through in our view.

Environmental Quality

12.20 Wadhurst has a pleasant environment, with well-kept frontages and buildings' facades. Overall it has a well maintained public realm, albeit there are some areas which are over-grown with weeds. The streets are generally clean, however we understand that the lower end of the High Street suffers from the accumulation of dirt as the sweeping machine is unable to get close enough to the curb to collect it. The Parish Council is looking to address this issue. We also understand that the drains can become blocked during heavy rain, creating further debris on the streets. Hence it would be beneficial to address this matter by unblocking the drains. The Parish Council is also currently working on improving street furniture (bins and benches) to achieve a uniform standard.

12.21 It is notable that the village lacks a public square or an open space, and we consider this would be highly beneficial to provide an attractive focal point. However the church of St Peter and St Paul is set on the northern edge of the centre of Wadhurst is a pleasant addition the centre.

Customer Perceptions

12.22 The household survey asked those respondents who visit Wadhurst for shopping and/or leisure reasons what they like about the centre (Q23). The key responses are summarised in the table below.

12.23 As the table shows, some 17.6% of respondents could not think of anything they specifically like about the centre. Of the remainder, the highest proportion identified the fact that it is convenient to where they live or work (30.4%), followed by its nice environment (22.7%), good choice of independent shops (14.7%) and choice of non-food shops (9.3%).

Table 12.2 What people like about Wadhurst

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing / Very Little/Don't Know	17.6%	52.5%	45.3%	0.0%	14.6%	0.0%	0.0%	58.7%	0.0%	18.1%
Attractive environment / nice place	22.7%	0.0%	36.7%	0.0%	34.4%	35.7%	100.0%	0.0%	0.0%	12.8%
Convenience to home, work, etc.	30.4%	0.0%	0.0%	0.0%	25.5%	41.1%	0.0%	41.3%	0.0%	36.5%
Easy to get to by bus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to get to by car	1.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easy to park	2.1%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	3.0%
Free parking	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The market	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good food stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good pubs, cafés or restaurants	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good range of non-food shops	9.3%	0.0%	9.4%	0.0%	0.0%	25.2%	0.0%	0.0%	0.0%	8.1%
Good range of independent shops	14.7%	0.0%	27.4%	0.0%	18.5%	24.6%	0.0%	0.0%	0.0%	11.1%
Good range of 'high street' retailers/ multiples	5.9%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	10.4%
High quality shops	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Quiet	1.8%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%	0.0%	0.0%	0.0%
Traditional	2.8%	0.0%	0.0%	0.0%	0.0%	11.7%	0.0%	0.0%	0.0%	1.6%
Good hardware / DIY store	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Jempson's store	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Nice art gallery	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%

Notes: Multiple responses. Excludes those who indicated they 'never' visit the centre in reponse to Question 22.

12.24 The survey also asked all respondents what improvements to Wadhurst would potentially make them visit more often than they currently do for shopping and leisure reasons. The main responses are set out in the table below.

Table 12.3 Suggested Improvements to Wadhurst

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Nothing	59.9%	57.5%	66.5%	52.0%	53.5%	37.0%	76.3%	65.1%	69.0%	47.4%
Don't Know	32.6%	42.5%	27.8%	47.4%	29.6%	42.7%	23.0%	34.9%	30.1%	8.5%
Better access by road	0.9%	0.0%	0.7%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	8.7%
Better public transport	0.2%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.7%
Free car parking	0.9%	0.0%	0.7%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	5.9%
More / better parking	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
More / better non-food shops	0.7%	0.0%	0.0%	0.0%	0.7%	7.8%	0.0%	0.0%	0.0%	2.0%
More / better food shops	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%
More national multiple shops / High Street shop	0.2%	0.0%	0.8%	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%
More clothes shops	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More independent shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better services	0.2%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.7%
Less charity shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More / better parking	3.1%	0.0%	0.7%	0.6%	5.2%	10.7%	0.0%	0.0%	0.0%	20.6%
Improve the environment	2.4%	0.0%	2.6%	0.0%	11.6%	2.3%	0.0%	0.0%	0.0%	8.6%

Notes: Multiple responses.

12.25 The majority of respondents could not think of any improvements. Of the remainder, a small proportion identified the need for more/better parking (3.1%). Of those who identified the need for improvements to the environment (2.4%), the main comments focussed on reducing traffic congestion around the centre. Overall respondents appear to be generally satisfied with Wadhurst as a place to shop and visit for a range of leisure uses.

Summary

12.26 Based on the key performance indicators considered as part of the health check assessment, and our site visit, we consider Wadhurst is a relatively healthy and viable village centre and is performing well. The key findings and recommendations are summarised below:

- It has a good mix of convenience and comparison goods outlets, catering for the basic day-to-day needs of the local population.
- The shops are very popular with the local community, although we understand that the centre would benefit from some of the shops and leisure services opening later in the evenings.
- The centre's offer is dominated by independent retailers, which adds to its overall character and attraction. Wadhurst should build on its independent offer, improving the quality of provision and its niche retail offer.
- The centre has a pleasant environment, but the on–street parking management could be improved. Some public realm improvements could be beneficial to maintain a pleasant environment.
- There are no vacant units, which is a healthy indication of its relatively strong performance as a shopping location.
- The centre has a popular market, which should be encouraged to flourish through proactive management and marketing.

13 GLOSSARY

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.

REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

APPENDIX 1: STUDY AREA PLAN

Zones

1 2 3 4 5 6 7 8 9

Wealden District

Carter Jonas

APPENDIX 2: HOUSEHOLD SURVEY METHODOLOGY & QUESTIONNAIRE

APPENDIX 3: HOUSEHOLD SURVEY RESULTS (WEIGHTED)

APPENDIX 4: CONVENIENCE GOODS - MARKET SHARES (incl SFT)

APPENDIX 5: COMPARISON GOODS - MARKET SHARES (incl SFT)

APPENDIX 6: HEALTH CHECK METHODOLOGY – EXPLANATORY NOTE

1. Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

2. Sections 6-12 provide high-level health check updates for the main town centres in the study area; namely Hailsham, Polegate, Uckfield, Crowborough, Heathfield, Forest Row and Wadhurst. An audit is also provided on retail provision across the District's network of district centres, as well as out of centre shopping destinations.

3. In accordance with the PPG (paragraph 005), there are a number of Key Performance Indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the KPIs include:
   - ✓ the scale and diversity of uses (e.g. retail and services offer);
   - ✓ retailer representation and demand;
   - ✓ commercial property indicators (such as Prime Zone A Rents);
   - ✓ changes in vacancy levels;
   - ✓ accessibility and parking provision;
   - ✓ the quality of the town centre environment;
   - ✓ pedestrian footfall; and
   - ✓ customers' views and behaviour.

4. In this case the most robust KPIs have been gathered (where possible) for the centres to help inform the assessment of their overall strengths and weaknesses in retail terms, the opportunities for new sustainable development and growth, and any current and future threats to their overall vitality and viability.

5. In this case the assessment of the mix of uses in the main town centres has been informed by analysis of Wealden District Council's Town Centre Audits from May/August 2015. This has been further supplemented by site visits and audits of the District's retail provision carried out by CJ in July 2016, and by stakeholder consultation to gain a better understanding of the key issues.

6. The health check assessments provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres, benchmarked against UK averages based on Experian Goad's analysis of approximately 2,000 centres and shopping locations in the UK. In this case we have categorised the individual units in each centre into convenience, comparison, services and vacant outlets based on the Experian Goad Categories (2016) to help inform our assessment. It should be noted that Services as defined by Experian Goad can be sub-divided into the following three sub-categories.
   - ✓ Retail services - including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.;
   - ✓ Leisure services - which comprise cafes and restaurants (Class A3), betting shops (sui generous), fast food/ takeaway outlets (Class A5); and
   - ✓ Financial and professional services - covering all Class A2 uses (such as banks, estate agents, etc).

7. We have also referred to Javelin's Venuescore ranking of the UK's top 3,000+ retail venues based on provision of multiple retailers (including anchor stores, fashion operators, and non-fashion multiples), where each operator is given a weighted score to reflect its overall impact on the shopping patterns. For each centre a Venuescore is Javelin Group's annual ranking has been established for 2014-2015 and compared with the position in 2007.

8. In addition we have drawn on other datasets and research to help assess the relative vitality and viability of the District's main town centres, as referenced though out the report. CJ's commercial property agents have also provided their market intelligence on some of the key property market indicators for the main centres (including Prime Zone A Rents and Yields), where available. Our in-house market knowledge has also been supplemented by discussions with local agents in the District's centres to help inform our assessment of the commercial performance of each centre, as well as the current market interest/demand for space from retailers, commercial leisure operators and other town centre users.