

Hastings Town Centre, Retail & Leisure Uses Study

Volume 2: Appendices

Prepared for:

Hastings Borough Council

December 2024

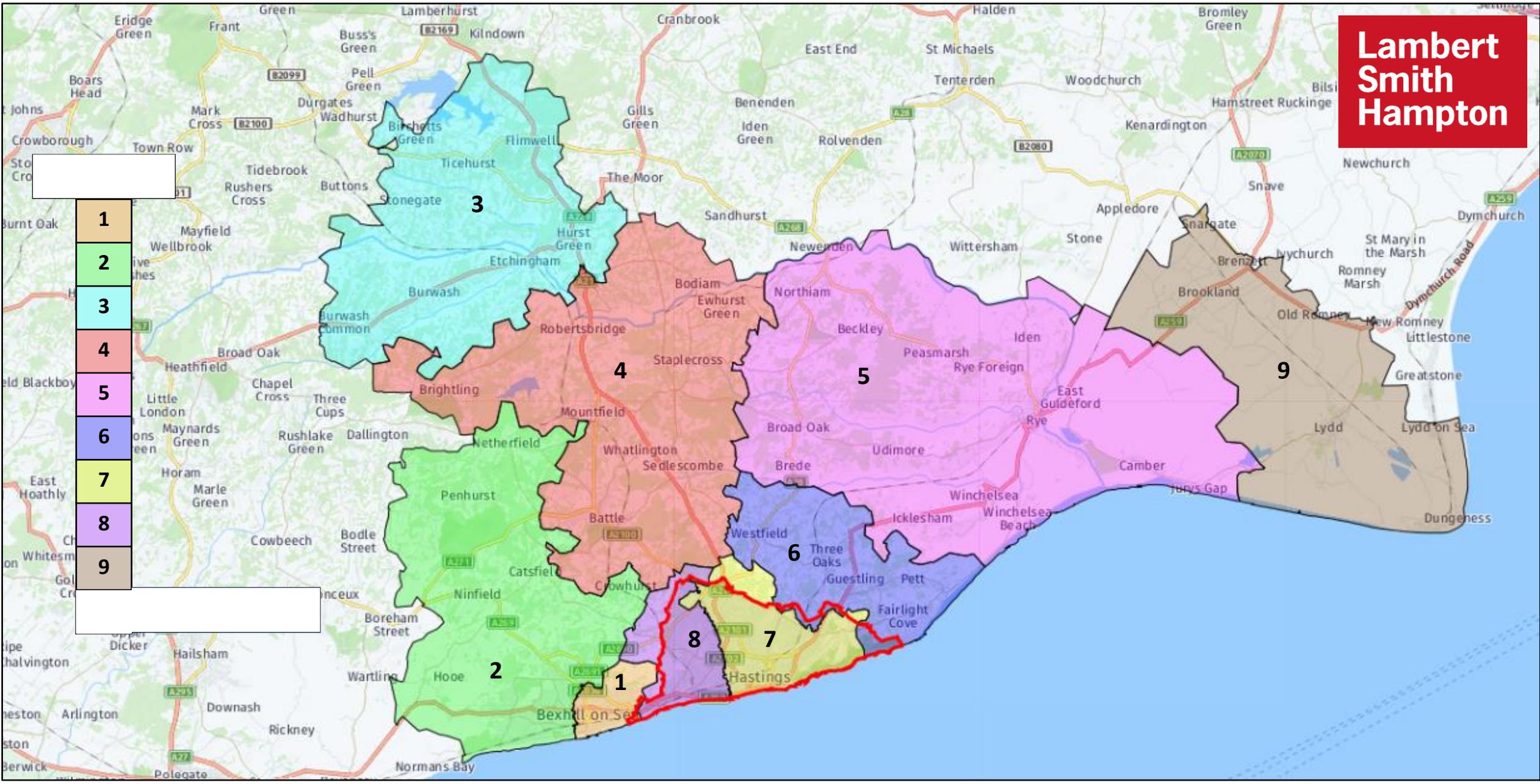
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Volume 2: Appendices

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Appendix 1: Defined Catchment Area & Zones



**Appendix 2: Population and Expenditure:
Convenience Goods**

ZONE:	2024	2025	2030	2035	2040	2045	GROWTH 2024 to 2045 (%)	
	2024	2025	2030	2035	2040	2045	2024 2035	2024 2045
Zone 1	18,743	18,870	19,383	19,827	20,265	20,745	5.8%	10.7%
Zone 2	32,130	32,286	33,231	34,027	34,583	35,307	5.9%	9.9%
Zone 3	9,118	9,217	9,557	9,895	10,248	10,637	8.5%	16.7%
Zone 4	13,746	13,861	14,420	14,872	15,378	15,942	8.2%	16.0%
Zone 5	17,120	17,252	17,759	18,142	18,476	18,897	6.0%	10.4%
Zone 6	7,536	7,582	7,777	7,941	8,051	8,206	5.4%	8.9%
Zone 7	61,652	61,706	62,041	62,440	62,930	63,435	1.3%	2.9%
Zone 8	29,264	29,289	29,496	29,847	30,219	30,593	2.0%	4.5%
Zone 9	6,169	6,199	6,395	6,606	6,800	7,008	7.1%	13.6%
Study Area	195,478	196,262	200,059	203,597	206,950	210,770	4.2%	7.8%

Source: EXPERIAN BUSINESS STRATEGIES

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

TABLE 2: REVISED CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2024	2024	2025	2030	2035	2040	2045
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
EXPERIAN - SPECIAL FORMS OF TRADING (%):		5.2%	5.6%	6.5%	7.1%	7.4%	7.4%
REVISED SPECIAL FORMS OF TRADING (%):		2.9%	3.1%	3.6%	3.9%	4.1%	4.1%
Zone 1	£2,662	£2,495	£2,485	£2,472	£2,476	£2,484	£2,496
Zone 2	£2,801	£2,626	£2,615	£2,601	£2,605	£2,614	£2,627
Zone 3	£3,160	£2,962	£2,950	£2,935	£2,939	£2,949	£2,963
Zone 4	£3,037	£2,847	£2,835	£2,820	£2,825	£2,834	£2,848
Zone 5	£3,055	£2,864	£2,852	£2,837	£2,841	£2,851	£2,865
Zone 6	£3,000	£2,812	£2,800	£2,786	£2,790	£2,799	£2,813
Zone 7	£2,593	£2,431	£2,420	£2,408	£2,412	£2,420	£2,432
Zone 8	£2,567	£2,406	£2,396	£2,384	£2,388	£2,395	£2,407
Zone 9	£2,739	£2,568	£2,557	£2,544	£2,548	£2,556	£2,569
STUDY AREA AVERAGE:	£2,846	£2,668	£2,657	£2,643	£2,647	£2,656	£2,669

Source: Average spend per capita estimates (2022 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 21 published by Experian Business Strategies (February 2024).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the Retail Planner Briefing Note 21 (February 2024).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2024) TO 2045 (£m) GROWTH 2024 to 2045 (%)

	2024	2024	2025	2030	2035	2040	2045	GROWTH 2024 to 2045 (%)	
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING						2024 2035	2024 2045
Zone 1	49.9	46.8	46.9	47.9	49.1	50.3	51.8	5.0%	10.7%
Zone 2	90.0	84.4	84.4	86.4	88.6	90.4	92.7	5.1%	9.9%
Zone 3	28.8	27.0	27.2	28.0	29.1	30.2	31.5	7.7%	16.7%
Zone 4	41.7	39.1	39.3	40.7	42.0	43.6	45.4	7.3%	16.0%
Zone 5	52.3	49.0	49.2	50.4	51.5	52.7	54.1	5.1%	10.4%
Zone 6	22.6	21.2	21.2	21.7	22.2	22.5	23.1	4.5%	8.9%
Zone 7	159.9	149.9	149.4	149.4	150.6	152.3	154.3	0.5%	2.9%
Zone 8	75.1	70.4	70.2	70.3	71.3	72.4	73.6	1.2%	4.6%
Zone 9	16.9	15.8	15.8	16.3	16.8	17.4	18.0	6.2%	13.6%
STUDY AREA:	537.2	503.6	503.6	511.1	521.2	531.8	544.6	3.5%	8.1%

**Appendix 3: Convenience Goods Market Shares
(including SFT)**

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Convenience Goods: Market Shares (Including SFT) (%)

TABLE 1: ALL CONVENIENCE GOODS - 2024 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	0.3%	0.0%	0.0%	1.5%	0.8%	1.6%	0.0%	0.0%	0.6%
Marks & Spencer, Priory Meadow Shopping Centre	0.1%	0.0%	0.0%	0.2%	0.8%	1.3%	2.5%	2.3%	0.0%	1.2%
Morrisons, Queens Road	1.4%	0.8%	0.0%	0.7%	2.7%	14.4%	17.6%	2.1%	0.5%	6.8%
Sainsbury's Local, Station Approach	1.3%	0.3%	0.0%	1.2%	1.0%	0.2%	0.4%	1.2%	0.0%	0.6%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.6%	0.5%	0.0%	0.3%
All Other Floorspace	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.5%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.5%	0.0%	0.4%
All Other Floorspace	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.8%	0.0%	0.5%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	0.7%	0.3%	2.0%	2.8%	2.6%	6.9%	6.2%	0.0%	3.6%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	0.5%	0.5%	0.0%	0.9%	0.6%	4.7%	7.7%	2.9%	0.0%	2.9%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.8%	0.9%	0.0%	0.3%	0.0%	0.0%	0.4%	4.0%	0.0%	0.9%
Aldi, Rye Road	0.3%	1.2%	0.5%	2.6%	18.2%	18.0%	8.8%	2.7%	0.0%	5.9%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.7%	0.0%	0.3%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.2%	0.0%	0.3%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.6%	0.4%	0.6%	4.8%	7.5%	5.1%	0.0%	3.4%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.5%	0.7%	2.6%	18.9%	9.4%	13.9%	9.3%	7.6%	0.0%	7.0%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%	1.4%	5.0%	0.0%	1.2%
Tesco Express, Little Ridge Avenue	1.0%	0.0%	0.0%	0.0%	0.3%	0.0%	1.5%	0.0%	0.0%	0.5%
Tesco Extra, Church Wood Drive	1.7%	5.9%	1.4%	15.3%	4.5%	13.3%	12.7%	26.2%	0.0%	11.1%
HASTINGS BOROUGH COUNCIL AREA	7.7%	11.5%	5.4%	42.5%	44.1%	74.3%	82.7%	72.2%	0.5%	48.1%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	3.3%	0.5%	0.0%	0.0%	31.0%	1.2%
Bexhill-on-Sea	58.3%	50.8%	4.9%	4.5%	1.5%	3.0%	4.5%	5.4%	0.0%	17.8%
Bexhill-on-Sea: Ravenside Retail Park	25.6%	21.7%	1.7%	3.2%	0.2%	2.1%	2.7%	7.4%	0.0%	8.6%
Eastbourne	1.4%	2.0%	0.9%	1.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.6%
Royal Tunbridge Wells	0.0%	0.0%	12.6%	1.9%	0.0%	0.1%	0.0%	0.0%	0.0%	0.8%
Hawkhurst	0.0%	0.0%	24.0%	6.6%	3.7%	1.1%	0.0%	0.0%	0.0%	2.0%
Heathfield	1.1%	0.0%	17.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
All Other Centres / Stores	0.5%	6.9%	17.4%	31.1%	39.2%	10.6%	2.0%	2.5%	49.1%	10.9%
Sub-Total	86.9%	81.3%	78.9%	48.9%	48.0%	17.5%	9.1%	15.5%	80.0%	42.9%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING										
	5.4%	7.2%	15.7%	8.6%	8.0%	8.2%	8.2%	12.3%	19.4%	9.0%
TOTAL	100%									

TABLE 2: MAIN FOOD PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
 Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	1.2%	0.0%	0.0%	0.5%
Marks & Spencer, Priory Meadow Shopping Centre	0.0%	0.0%	0.0%	0.0%	1.3%	0.6%	1.6%	2.2%	0.0%	1.0%
Morrisons, Queens Road	2.1%	1.3%	0.0%	0.9%	2.8%	15.6%	22.7%	0.8%	0.0%	8.6%
Sainsbury's Local, Station Approach	2.1%	0.0%	0.0%	1.4%	1.5%	0.0%	0.0%	1.5%	0.0%	0.7%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.3%	0.0%	0.3%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	1.2%	0.6%	3.3%	3.4%	0.6%	5.8%	2.1%	0.0%	2.9%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.3%	0.0%	0.0%	0.1%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	1.4%	1.5%	0.0%	0.5%	0.0%	0.0%	0.3%	3.3%	0.0%	1.0%
Aldi, Rye Road	0.5%	1.5%	0.6%	2.1%	24.8%	18.5%	11.5%	3.8%	0.0%	7.6%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.8%	5.3%	10.6%	4.6%	0.0%	4.3%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.4%	1.7%	28.4%	12.9%	17.1%	10.5%	9.1%	0.0%	8.6%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	4.3%	0.0%	0.7%
Tesco Express, Little Ridge Avenue	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Tesco Extra, Church Wood Drive	2.1%	5.8%	1.1%	17.4%	5.0%	17.0%	17.9%	36.8%	0.0%	14.6%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	9.8%	11.8%	3.9%	54.0%	53.8%	75.3%	83.4%	69.8%	0.0%	51.3%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	3.5%	0.6%	0.0%	0.0%	37.6%	1.5%
Bexhill-on-Sea	51.8%	49.4%	0.6%	6.2%	1.3%	4.3%	5.0%	4.6%	0.0%	15.9%
Bexhill-on-Sea: Ravenside Retail Park	28.5%	25.1%	1.7%	3.2%	0.0%	0.6%	1.8%	8.9%	0.0%	9.0%
Eastbourne	0.9%	2.3%	0.6%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Royal Tunbridge Wells	0.0%	0.0%	9.9%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Hawkhurst	0.0%	0.0%	27.2%	6.5%	2.0%	1.9%	0.0%	0.0%	0.0%	2.0%
Heathfield	1.6%	0.0%	22.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
All Other Centres / Stores	0.0%	1.2%	9.3%	15.5%	28.3%	4.7%	1.1%	0.8%	30.2%	5.9%
Sub-Total	82.8%	78.0%	72.1%	35.8%	35.1%	12.1%	7.8%	14.4%	67.8%	36.8%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING										
	7.4%	10.2%	24.0%	10.2%	11.1%	12.7%	8.7%	15.8%	32.2%	11.9%
TOTAL	100%									

TABLE 3: OTHER ('SECONDARY') MAIN FOOD PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
 Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	2.0%	0.0%	0.0%	0.6%
Marks & Spencer, Priory Meadow Shopping Centre	0.0%	0.0%	0.0%	0.7%	0.0%	3.2%	6.3%	2.6%	0.0%	2.4%
Morrisons, Queens Road	0.7%	0.0%	0.0%	0.0%	6.2%	25.8%	10.6%	9.2%	3.5%	6.0%
Sainsbury's Local, Station Approach	0.0%	1.8%	0.0%	2.4%	0.8%	1.1%	0.0%	0.0%	0.0%	0.6%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.2%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.6%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.1%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	0.0%	0.0%	0.0%	4.8%	8.8%	11.8%	21.9%	0.0%	7.3%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	0.0%	1.8%	0.0%	3.2%	2.4%	3.5%	6.1%	4.7%	0.0%	3.4%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	7.3%	0.0%	1.2%
Aldi, Rye Road	0.0%	0.0%	1.0%	6.7%	15.0%	14.4%	7.2%	2.3%	0.0%	4.7%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	1.0%	2.4%	0.8%	9.6%	2.4%	7.4%	0.0%	2.4%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	3.1%	2.3%	9.6%	10.0%	10.5%	8.7%	15.3%	11.1%	0.0%	9.2%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	2.6%	0.7%	0.0%	1.0%
Tesco Express, Little Ridge Avenue	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.5%
Tesco Extra, Church Wood Drive	2.6%	12.1%	2.1%	20.8%	9.9%	8.6%	8.5%	11.6%	0.0%	9.6%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	6.3%	17.9%	13.8%	46.2%	52.7%	89.1%	77.2%	79.6%	3.5%	49.9%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	8.3%	1.1%	0.0%	0.0%	46.2%	1.8%
Bexhill-on-Sea	56.1%	47.2%	0.0%	3.4%	0.8%	0.0%	2.2%	7.4%	0.0%	17.3%
Bexhill-on-Sea: Ravenside Retail Park	27.1%	20.5%	4.2%	7.2%	0.0%	6.5%	4.3%	5.5%	0.0%	10.0%
Eastbourne	5.7%	2.6%	2.1%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	1.3%
Royal Tunbridge Wells	0.0%	0.0%	29.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Hawkhurst	0.0%	0.0%	27.6%	10.7%	7.5%	0.0%	0.0%	0.0%	0.0%	2.6%
Heathfield	0.7%	0.0%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
All Other Centres / Stores	0.0%	6.7%	5.3%	20.7%	24.1%	3.2%	2.0%	0.0%	50.3%	7.0%
Sub-Total	89.6%	77.0%	77.8%	41.9%	40.6%	10.9%	8.5%	13.5%	96.5%	41.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING										
	4.1%	5.1%	8.4%	11.9%	6.7%	0.0%	14.3%	6.9%	0.0%	8.4%
TOTAL	100%									

TABLE 4: TOP UP FOOD PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
 Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	1.0%
Marks & Spencer, Priory Meadow Shopping Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	1.2%	2.6%	0.0%	0.8%
Morrisons, Queens Road	0.0%	0.0%	0.0%	0.7%	0.6%	3.7%	15.2%	0.6%	0.0%	4.4%
Sainsbury's Local, Station Approach	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	2.0%	0.0%	1.0%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	1.3%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.6%
All Other Floorspace	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	12.5%	0.0%	2.6%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	7.7%	8.0%	0.0%	3.3%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.1%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	1.7%	0.0%	2.9%	1.8%	17.3%	27.0%	10.4%	0.0%	10.1%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%
Aldi, Rye Road	0.0%	2.0%	0.0%	2.6%	4.6%	22.3%	3.7%	0.6%	0.0%	2.9%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	4.8%	0.0%	1.8%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	4.8%	0.0%	1.4%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	3.2%	0.0%	0.0%	0.9%	2.4%	4.4%	0.0%	1.5%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.5%	0.0%	1.4%	0.6%	6.5%	3.6%	0.0%	0.0%	1.5%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	13.0%	0.0%	3.2%
Tesco Express, Little Ridge Avenue	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	3.9%	0.0%	0.0%	1.2%
Tesco Extra, Church Wood Drive	0.0%	1.7%	0.0%	3.0%	0.0%	6.0%	0.6%	10.6%	0.0%	2.5%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	1.9%	7.5%	3.2%	10.5%	9.6%	62.2%	89.7%	79.2%	0.0%	41.6%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.1%
Bexhill-on-Sea	71.5%	62.5%	26.3%	2.2%	3.7%	2.8%	0.6%	6.8%	0.0%	22.3%
Bexhill-on-Sea: Ravenside Retail Park	24.0%	10.9%	0.0%	1.4%	0.0%	0.0%	2.1%	7.5%	0.0%	6.3%
Eastbourne	0.0%	1.7%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Royal Tunbridge Wells	0.0%	0.0%	6.4%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.4%
Hawkhurst	0.0%	0.0%	17.3%	5.0%	1.8%	0.0%	0.0%	0.0%	0.0%	1.5%
Heathfield	0.0%	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres / Stores	0.6%	15.5%	35.3%	80.3%	82.9%	30.4%	2.5%	6.5%	97.0%	24.4%
Sub-Total	96.0%	90.5%	96.8%	88.8%	88.4%	34.1%	5.2%	20.8%	99.3%	56.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	2.1%	2.0%	0.0%	0.7%	2.0%	3.7%	5.1%	0.0%	0.7%	2.4%
TOTAL	100%									

TABLE 5: OTHER TOP UP FOOD PURCHASES - 2024 MARKET SHARE ANALYSIS (%)
 Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	0.0%	0.0%	0.0%	6.5%	4.5%	1.5%	0.0%	0.0%	1.0%
Marks & Spencer, Priory Meadow Shopping Centre	1.4%	0.0%	0.0%	1.4%	0.0%	0.0%	4.6%	1.6%	0.0%	1.6%
Morrisons, Queens Road	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	1.5%	1.6%	0.0%	0.9%
Sainsbury's Local, Station Approach	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	4.7%	5.2%	0.0%	2.2%
All Other Floorspace	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	1.9%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	1.6%	0.0%	1.5%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	1.1%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	4.9%	4.8%	0.0%	2.1%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	4.6%	0.0%	0.0%	0.0%	0.0%	11.9%	25.3%	6.6%	0.0%	7.9%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%	1.2%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	4.1%	14.4%	3.1%	0.0%	0.0%	1.8%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.7%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	5.9%	0.0%	1.9%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	1.4%	1.4%	0.0%	13.5%	1.5%	4.9%	0.0%	1.9%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	1.5%	3.2%	0.0%	1.2%
Tesco Express, Little Ridge Avenue	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%	1.5%
Tesco Extra, Church Wood Drive	0.0%	3.0%	4.2%	13.2%	0.0%	9.2%	6.4%	7.6%	0.0%	5.1%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	6.0%	6.0%	5.5%	15.9%	24.3%	64.8%	76.5%	65.4%	0.0%	35.4%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.5%	0.3%
Bexhill-on-Sea	81.0%	46.9%	6.3%	0.0%	0.0%	0.0%	10.8%	4.9%	0.0%	23.0%
Bexhill-on-Sea: Ravenside Retail Park	8.7%	19.2%	0.4%	0.0%	2.0%	7.5%	6.2%	1.6%	0.0%	7.7%
Eastbourne	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Royal Tunbridge Wells	0.0%	0.0%	12.8%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Hawkhurst	0.0%	0.0%	9.0%	4.1%	11.6%	0.0%	0.0%	0.0%	0.0%	1.6%
Heathfield	0.0%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres / Stores	4.4%	27.9%	56.7%	67.1%	62.1%	27.7%	6.4%	10.3%	88.5%	27.1%
Sub-Total	94.0%	94.0%	94.5%	77.6%	75.7%	35.2%	23.5%	16.9%	100.0%	61.8%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	17.7%	0.0%	2.8%
TOTAL	100%	100%								

**Appendix 4: Convenience Goods Turnover
(excluding SFT)**

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Convenience Goods: Market Shares (Excluding SFT) (%)

TABLE 1: ALL CONVENIENCE GOODS - 2024 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	0.0%	0.3%	0.0%	0.0%	1.6%	0.8%	1.7%	0.0%	0.0%	0.7%
Marks & Spencer, Priory Meadow Shopping Centre	0.2%	0.0%	0.0%	0.3%	0.9%	1.4%	2.7%	2.6%	0.0%	1.3%
Morrisons, Queens Road	1.5%	0.8%	0.0%	0.7%	2.9%	15.6%	19.2%	2.4%	0.7%	7.5%
Sainsbury's Local, Station Approach	1.3%	0.3%	0.0%	1.3%	1.1%	0.2%	0.4%	1.4%	0.0%	0.7%
Tesco Express, Havelock Road	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.6%	0.6%	0.0%	0.3%
All Other Floorspace	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.5%
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.8%	0.0%	0.5%
All Other Floorspace	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	3.2%	0.0%	0.6%
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	0.0%	0.8%	0.4%	2.2%	3.0%	2.9%	7.5%	7.1%	0.0%	3.9%
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	0.5%	0.6%	0.0%	1.0%	0.7%	5.1%	8.4%	3.3%	0.0%	3.2%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.9%	1.0%	0.0%	0.3%	0.0%	0.0%	0.4%	4.5%	0.0%	1.0%
Aldi, Rye Road	0.3%	1.3%	0.6%	2.9%	19.8%	19.6%	9.6%	3.1%	0.0%	6.4%
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%	0.0%	0.4%
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.4%	0.0%	0.3%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.8%	0.4%	0.7%	5.2%	8.2%	5.9%	0.0%	3.7%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.5%	0.7%	3.1%	20.7%	10.2%	15.1%	10.1%	8.7%	0.0%	7.7%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%	1.6%	5.6%	0.0%	1.3%
Tesco Express, Little Ridge Avenue	1.0%	0.0%	0.0%	0.0%	0.3%	0.0%	1.6%	0.0%	0.0%	0.6%
Tesco Extra, Church Wood Drive	1.7%	6.3%	1.7%	16.8%	4.8%	14.5%	13.8%	29.8%	0.0%	12.2%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	8.1%	12.4%	6.5%	46.5%	47.9%	80.9%	90.1%	82.4%	0.7%	52.8%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	3.6%	0.6%	0.0%	0.0%	38.4%	1.4%
Bexhill-on-Sea	61.6%	54.7%	5.8%	5.0%	1.6%	3.3%	4.9%	6.2%	0.0%	19.5%
Bexhill-on-Sea: Ravenside Retail Park	27.1%	23.4%	2.0%	3.5%	0.2%	2.3%	2.9%	8.5%	0.0%	9.4%
Eastbourne	1.5%	2.2%	1.0%	1.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.7%
Royal Tunbridge Wells	0.0%	0.0%	14.9%	2.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.8%
Hawkhurst	0.0%	0.0%	28.4%	7.3%	4.1%	1.2%	0.0%	0.0%	0.0%	2.2%
Heathfield	1.1%	0.0%	20.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
All Other Centres / Stores	0.6%	7.4%	20.6%	34.1%	42.6%	11.5%	2.1%	2.9%	60.9%	12.0%
Sub-Total	91.9%	87.6%	93.5%	53.5%	52.1%	19.1%	9.9%	17.6%	99.3%	47.2%
TOTAL	100%									

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Convenience Goods: Market Shares (Excluding SFT) (%)

TABLE 2: 2024 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.2	£0.0	£0.0	£0.8	£0.2	£2.5	£0.0	£0.0	£3.6
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.4	£0.3	£4.1	£1.8	£0.0	£6.7
Morrisons, Queens Road	£0.7	£0.7	£0.0	£0.3	£1.4	£3.3	£28.8	£1.7	£0.1	£37.8
Sainsbury's Local, Station Approach	£0.6	£0.2	£0.0	£0.5	£0.5	£0.0	£0.7	£1.0	£0.0	£3.6
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.9	£0.4	£0.0	£1.5
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.6
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2	£0.0	£2.3
All Other Floorspace	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.2	£0.0	£2.9
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£0.8	£1.5	£0.6	£11.2	£5.0	£0.0	£19.8
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.2	£0.5	£0.0	£0.4	£0.3	£1.1	£12.6	£2.3	£0.0	£16.0
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.8	£0.0	£0.1	£0.0	£0.0	£0.6	£3.2	£0.0	£5.1
Aldi, Rye Road	£0.1	£1.1	£0.2	£1.1	£9.7	£4.2	£14.4	£2.2	£0.0	£32.5
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.0	£1.9
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.5
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.3	£1.1	£12.3	£4.1	£0.0	£18.6
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.2	£0.6	£0.8	£8.1	£5.0	£3.2	£15.2	£6.1	£0.0	£38.6
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£2.3	£4.0	£0.0	£6.6
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.4	£0.0	£0.0	£2.8
Tesco Extra, Church Wood Drive	£0.8	£5.3	£0.4	£6.6	£2.4	£3.1	£20.8	£21.0	£0.0	£61.5
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£3.8	£10.4	£1.7	£18.2	£23.5	£17.2	£135.0	£58.0	£0.1	£266.0
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£1.8	£0.1	£0.0	£0.0	£6.1	£6.8
Bexhill-on-Sea	£28.8	£46.1	£1.6	£1.9	£0.8	£0.7	£7.3	£4.3	£0.0	£98.3
Bexhill-on-Sea: Ravenside Retail Park	£12.7	£19.7	£0.5	£1.4	£0.1	£0.5	£4.3	£6.0	£0.0	£47.5
Eastbourne	£0.7	£1.8	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£3.5
Royal Tunbridge Wells	£0.0	£0.0	£4.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£4.2
Hawkhurst	£0.0	£0.0	£7.7	£2.8	£2.0	£0.3	£0.0	£0.0	£0.0	£11.1
Heathfield	£0.5	£0.0	£5.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£5.5
All Other Centres / Stores	£0.3	£6.2	£5.6	£13.3	£20.9	£2.4	£3.2	£2.0	£9.6	£60.6
Sub-Total	£43.0	£73.9	£25.3	£20.9	£25.6	£4.0	£14.8	£12.4	£15.7	£237.6
TOTAL	£46.8	£84.4	£27.0	£39.1	£49.0	£21.2	£149.9	£70.4	£15.8	£503.6

TABLE 3: 2025 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.2	£0.0	£0.0	£0.8	£0.2	£2.5	£0.0	£0.0	£3.6
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.4	£0.3	£4.1	£1.8	£0.0	£6.7
Morrisons, Queens Road	£0.7	£0.7	£0.0	£0.3	£1.4	£3.3	£28.7	£1.7	£0.1	£37.8
Sainsbury's Local, Station Approach	£0.6	£0.2	£0.0	£0.5	£0.5	£0.0	£0.7	£1.0	£0.0	£3.6
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.9	£0.4	£0.0	£1.5
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.6
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2	£0.0	£2.3
All Other Floorspace	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.2	£0.0	£2.9
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£0.9	£1.5	£0.6	£11.2	£5.0	£0.0	£19.8
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	£0.2	£0.5	£0.0	£0.4	£0.3	£1.1	£12.5	£2.3	£0.0	£16.0
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.8	£0.0	£0.1	£0.0	£0.0	£0.6	£3.2	£0.0	£5.1
Aldi, Rye Road	£0.1	£1.1	£0.2	£1.1	£9.7	£4.2	£14.4	£2.2	£0.0	£32.5
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.0	£1.9
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.5
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.3	£1.1	£12.2	£4.1	£0.0	£18.6
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.2	£0.6	£0.8	£8.1	£5.0	£3.2	£15.1	£6.1	£0.0	£38.6
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£2.3	£4.0	£0.0	£6.6
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.4	£0.0	£0.0	£2.8
Tesco Extra, Church Wood Drive	£0.8	£5.3	£0.5	£6.6	£2.4	£3.1	£20.7	£20.9	£0.0	£61.5
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£3.8	£10.4	£1.8	£18.3	£23.5	£17.2	£134.6	£57.8	£0.1	£266.0
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£1.8	£0.1	£0.0	£0.0	£6.1	£6.8
Bexhill-on-Sea	£28.9	£46.2	£1.6	£1.9	£0.8	£0.7	£7.3	£4.3	£0.0	£98.3
Bexhill-on-Sea: Ravenside Retail Park	£12.7	£19.7	£0.5	£1.4	£0.1	£0.5	£4.3	£6.0	£0.0	£47.5
Eastbourne	£0.7	£1.8	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£3.5
Royal Tunbridge Wells	£0.0	£0.0	£4.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£4.2
Hawkhurst	£0.0	£0.0	£7.7	£2.9	£2.0	£0.3	£0.0	£0.0	£0.0	£11.1
Heathfield	£0.5	£0.0	£5.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£5.5
All Other Centres / Stores	£0.3	£6.2	£5.6	£13.4	£21.0	£2.5	£3.2	£2.0	£9.7	£60.6
Sub-Total	£43.1	£74.0	£25.4	£21.0	£25.7	£4.0	£14.8	£12.4	£15.7	£237.6
TOTAL	£46.9	£84.4	£27.2	£39.3	£49.2	£21.2	£149.4	£70.2	£15.8	£503.6

TABLE 4: 2030 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.2	£0.0	£0.0	£0.8	£0.2	£2.5	£0.0	£0.0	£3.6
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.4	£0.3	£4.1	£1.8	£0.0	£6.8
Morrisons, Queens Road	£0.7	£0.7	£0.0	£0.3	£1.5	£3.4	£28.7	£1.7	£0.1	£38.4
Sainsbury's Local, Station Approach	£0.6	£0.2	£0.0	£0.5	£0.6	£0.0	£0.7	£1.0	£0.0	£3.6
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.9	£0.4	£0.0	£1.6
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.7
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2	£0.0	£2.4
All Other Floorspace	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.2	£0.0	£2.9
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£0.9	£1.5	£0.6	£11.2	£5.0	£0.0	£20.1
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	£0.2	£0.5	£0.0	£0.4	£0.3	£1.1	£12.5	£2.3	£0.0	£16.3
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.8	£0.0	£0.1	£0.0	£0.0	£0.6	£3.2	£0.0	£5.2
Aldi, Rye Road	£0.1	£1.1	£0.2	£1.2	£10.0	£4.3	£14.4	£2.2	£0.0	£32.9
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.0	£1.9
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.5
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.3	£1.1	£12.2	£4.1	£0.0	£18.9
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.2	£0.6	£0.9	£8.4	£5.1	£3.3	£15.1	£6.1	£0.0	£39.2
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£2.3	£4.0	£0.0	£6.7
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.4	£0.0	£0.0	£2.9
Tesco Extra, Church Wood Drive	£0.8	£5.5	£0.5	£6.8	£2.4	£3.1	£20.7	£21.0	£0.0	£62.4
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£3.9	£10.7	£1.8	£18.9	£24.1	£17.5	£134.6	£57.9	£0.1	£270.0
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£1.8	£0.1	£0.0	£0.0	£6.3	£6.9
Bexhill-on-Sea	£29.5	£47.3	£1.6	£2.0	£0.8	£0.7	£7.3	£4.3	£0.0	£99.8
Bexhill-on-Sea: Ravenside Retail Park	£13.0	£20.2	£0.6	£1.4	£0.1	£0.5	£4.3	£6.0	£0.0	£48.2
Eastbourne	£0.7	£1.9	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£3.5
Royal Tunbridge Wells	£0.0	£0.0	£4.2	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3
Hawkhurst	£0.0	£0.0	£8.0	£3.0	£2.0	£0.3	£0.0	£0.0	£0.0	£11.2
Heathfield	£0.5	£0.0	£5.8	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£5.6
All Other Centres / Stores	£0.3	£6.4	£5.8	£13.9	£21.5	£2.5	£3.2	£2.0	£9.9	£61.5
Sub-Total	£44.0	£75.8	£26.2	£21.8	£26.3	£4.1	£14.8	£12.4	£16.2	£241.1
TOTAL	£47.9	£86.4	£28.0	£40.7	£50.4	£21.7	£149.4	£70.3	£16.3	£511.1

TABLE 5: 2035 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.2	£0.0	£0.0	£0.8	£0.2	£2.6	£0.0	£0.0	£3.7
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.4	£0.3	£4.1	£1.8	£0.0	£6.9
Morrisons, Queens Road	£0.7	£0.7	£0.0	£0.3	£1.5	£3.5	£28.9	£1.7	£0.1	£39.1
Sainsbury's Local, Station Approach	£0.7	£0.3	£0.0	£0.6	£0.6	£0.0	£0.7	£1.0	£0.0	£3.7
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.9	£0.4	£0.0	£1.6
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.7
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.3	£0.0	£2.4
All Other Floorspace	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.3	£0.0	£3.0
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£0.9	£1.6	£0.6	£11.3	£5.1	£0.0	£20.5
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	£0.2	£0.5	£0.0	£0.4	£0.4	£1.1	£12.6	£2.4	£0.0	£16.6
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.8	£0.0	£0.1	£0.0	£0.0	£0.6	£3.2	£0.0	£5.3
Aldi, Rye Road	£0.1	£1.1	£0.2	£1.2	£10.2	£4.4	£14.5	£2.2	£0.0	£33.6
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.0	£1.9
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.5
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.3	£1.1	£12.3	£4.2	£0.0	£19.3
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.2	£0.6	£0.9	£8.7	£5.3	£3.3	£15.3	£6.2	£0.0	£40.0
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£2.4	£4.0	£0.0	£6.8
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.4	£0.0	£0.0	£2.9
Tesco Extra, Church Wood Drive	£0.9	£5.6	£0.5	£7.0	£2.5	£3.2	£20.9	£21.3	£0.0	£63.6
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£4.0	£11.0	£1.9	£19.5	£24.7	£17.9	£135.7	£58.7	£0.1	£275.3
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£1.9	£0.1	£0.0	£0.0	£6.5	£7.1
Bexhill-on-Sea	£30.2	£48.5	£1.7	£2.1	£0.8	£0.7	£7.4	£4.4	£0.0	£101.8
Bexhill-on-Sea: Ravenside Retail Park	£13.3	£20.7	£0.6	£1.5	£0.1	£0.5	£4.3	£6.0	£0.0	£49.2
Eastbourne	£0.7	£1.9	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£3.6
Royal Tunbridge Wells	£0.0	£0.0	£4.3	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4
Hawkhurst	£0.0	£0.0	£8.3	£3.0	£2.1	£0.3	£0.0	£0.0	£0.0	£11.4
Heathfield	£0.6	£0.0	£6.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£5.7
All Other Centres / Stores	£0.3	£6.5	£6.0	£14.3	£22.0	£2.6	£3.2	£2.0	£10.3	£62.7
Sub-Total	£45.1	£77.7	£27.2	£22.5	£26.9	£4.2	£14.9	£12.6	£16.7	£245.9
TOTAL	£49.1	£88.6	£29.1	£42.0	£51.5	£22.2	£150.6	£71.3	£16.8	£521.2

TABLE 6: 2040 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.3	£0.0	£0.0	£0.8	£0.2	£2.6	£0.0	£0.0	£3.8
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.5	£0.3	£4.2	£1.9	£0.0	£7.1
Morrisons, Queens Road	£0.7	£0.8	£0.0	£0.3	£1.5	£3.5	£29.2	£1.8	£0.1	£39.9
Sainsbury's Local, Station Approach	£0.7	£0.3	£0.0	£0.6	£0.6	£0.0	£0.7	£1.0	£0.0	£3.8
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.9	£0.4	£0.0	£1.6
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.8
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3	£0.0	£2.5
All Other Floorspace	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.3	£0.0	£3.0
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£0.9	£1.6	£0.6	£11.4	£5.2	£0.0	£20.9
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	£0.2	£0.5	£0.0	£0.4	£0.4	£1.1	£12.8	£2.4	£0.0	£16.9
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.9	£0.0	£0.1	£0.0	£0.0	£0.6	£3.3	£0.0	£5.4
Aldi, Rye Road	£0.1	£1.2	£0.2	£1.3	£10.4	£4.4	£14.6	£2.2	£0.0	£34.3
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.0	£2.0
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.6
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.4	£1.2	£12.5	£4.2	£0.0	£19.7
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.2	£0.6	£0.9	£9.0	£5.4	£3.4	£15.4	£6.3	£0.0	£40.8
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£2.4	£4.1	£0.0	£6.9
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.5	£0.0	£0.0	£3.0
Tesco Extra, Church Wood Drive	£0.9	£5.7	£0.5	£7.3	£2.5	£3.3	£21.1	£21.6	£0.0	£64.9
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£4.1	£11.2	£1.9	£20.3	£25.2	£18.2	£137.2	£59.6	£0.1	£280.9
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£1.9	£0.1	£0.0	£0.0	£6.7	£7.2
Bexhill-on-Sea	£31.0	£49.4	£1.8	£2.2	£0.8	£0.7	£7.4	£4.5	£0.0	£103.8
Bexhill-on-Sea: Ravenside Retail Park	£13.6	£21.1	£0.6	£1.5	£0.1	£0.5	£4.4	£6.1	£0.0	£50.2
Eastbourne	£0.7	£2.0	£0.3	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£3.7
Royal Tunbridge Wells	£0.0	£0.0	£4.5	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5
Hawkhurst	£0.0	£0.0	£8.6	£3.2	£2.1	£0.3	£0.0	£0.0	£0.0	£11.7
Heathfield	£0.6	£0.0	£6.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8
All Other Centres / Stores	£0.3	£6.7	£6.2	£14.9	£22.5	£2.6	£3.3	£2.1	£10.6	£64.0
Sub-Total	£46.2	£79.2	£28.3	£23.3	£27.5	£4.3	£15.1	£12.8	£17.3	£250.9
TOTAL	£50.3	£90.4	£30.2	£43.6	£52.7	£22.5	£152.3	£72.4	£17.4	£531.8

TABLE 7: 2044 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
 ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
 Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS										
Iceland, Castle Street	£0.0	£0.3	£0.0	£0.0	£0.9	£0.2	£2.6	£0.0	£0.0	£3.9
Marks & Spencer, Priory Meadow Shopping Centre	£0.1	£0.0	£0.0	£0.1	£0.5	£0.3	£4.2	£1.9	£0.0	£7.3
Morrisons, Queens Road	£0.8	£0.8	£0.0	£0.3	£1.6	£3.6	£29.6	£1.8	£0.1	£40.9
Sainsbury's Local, Station Approach	£0.7	£0.3	£0.0	£0.6	£0.6	£0.0	£0.7	£1.0	£0.0	£3.9
Tesco Express, Havelock Road	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.9	£0.4	£0.0	£1.7
All Other Floorspace	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£2.8
DISTRICT CENTRE: ST LEONARDS										
Co-op, London Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3	£0.0	£2.5
All Other Floorspace	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£2.4	£0.0	£3.1
DISTRICT CENTRE: SILVERHILL										
Asda, Battle Road	£0.0	£0.7	£0.1	£1.0	£1.6	£0.7	£11.6	£5.2	£0.0	£21.4
DISTRICT CENTRE: OLD TOWN										
Premier, George Street	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE										
	£0.3	£0.5	£0.0	£0.4	£0.4	£1.2	£12.9	£2.5	£0.0	£17.3
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.4	£0.9	£0.0	£0.1	£0.0	£0.0	£0.6	£3.3	£0.0	£5.5
Aldi, Rye Road	£0.1	£1.2	£0.2	£1.3	£10.7	£4.5	£14.8	£2.3	£0.0	£35.1
Co-op, 100 Battle Road, St Leonards-on-Sea (next to Hollington Library)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.6	£0.0	£2.0
Co-op, 290 Battle Road, St Leonards-on-Sea (used to be a pub - Victoria Inn)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£1.0	£0.0	£1.6
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.2	£0.2	£0.4	£1.2	£12.6	£4.3	£0.0	£20.2
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.3	£0.7	£1.0	£9.4	£5.5	£3.5	£15.6	£6.4	£0.0	£41.8
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£2.4	£4.2	£0.0	£7.1
Tesco Express, Little Ridge Avenue	£0.5	£0.0	£0.0	£0.0	£0.2	£0.0	£2.5	£0.0	£0.0	£3.0
Tesco Extra, Church Wood Drive	£0.9	£5.9	£0.5	£7.6	£2.6	£3.3	£21.4	£22.0	£0.0	£66.5
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
HASTINGS BOROUGH COUNCIL AREA	£4.2	£11.5	£2.0	£21.1	£25.9	£18.7	£139.0	£60.7	£0.1	£287.7
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.0	£0.0	£0.0	£2.0	£0.1	£0.0	£0.0	£6.9	£7.4
Bexhill-on-Sea	£31.9	£50.7	£1.8	£2.2	£0.9	£0.8	£7.5	£4.5	£0.0	£106.4
Bexhill-on-Sea: Ravenside Retail Park	£14.0	£21.7	£0.6	£1.6	£0.1	£0.5	£4.5	£6.2	£0.0	£51.4
Eastbourne	£0.8	£2.0	£0.3	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£3.8
Royal Tunbridge Wells	£0.0	£0.0	£4.7	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6
Hawkhurst	£0.0	£0.0	£9.0	£3.3	£2.2	£0.3	£0.0	£0.0	£0.0	£12.0
Heathfield	£0.6	£0.0	£6.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£6.0
All Other Centres / Stores	£0.3	£6.8	£6.5	£15.5	£23.1	£2.7	£3.3	£2.1	£11.0	£65.5
Sub-Total	£47.6	£81.3	£29.5	£24.3	£28.2	£4.4	£15.3	£13.0	£17.9	£256.9
TOTAL	£51.8	£92.7	£31.5	£45.4	£54.1	£23.1	£154.3	£73.6	£18.0	£544.6

Appendix 5: Convenience Goods Capacity

TABLE 1: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
Excluding SFT & 'Inflow' from outside Study Area

	2024	2025	2030	2035	2040	2045
HASTINGS BOROUGH COUNCIL AREA						
Town Centre: Hastings	£55.8	£55.8	£56.7	£57.8	£59.0	£60.4
District Centre: St Leonards	£5.2	£5.2	£5.3	£5.4	£5.5	£5.6
District Centre: Silverhill	£19.8	£19.8	£20.1	£20.5	£20.9	£21.4
District Centre: Old Town	£0.1	£0.1	£0.1	£0.1	£0.1	£0.1
All Local Centres / All Other Shops	£16.0	£16.0	£16.3	£16.6	£16.9	£17.3
All Out-of-Centre Locations	£169.1	£169.1	£171.6	£175.0	£178.5	£182.8
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN THE HASTINGS BOROUGH COUNCIL AREA	£266.0	£266.0	£270.0	£275.3	£280.9	£287.7

TABLE 2: ALL CONVENIENCE GOODS - TOTAL TURNOVER
Including 'Inflow' from outside Study Area

		2024	2025	2030	2035	2040	2045
HASTINGS BOROUGH COUNCIL AREA							
Town Centre: Hastings	3.0%	£57.5	£57.5	£58.4	£59.5	£60.7	£62.2
District Centre: St Leonards	1.0%	£5.3	£5.3	£5.3	£5.4	£5.6	£5.7
District Centre: Silverhill	1.0%	£20.0	£20.0	£20.3	£20.7	£21.1	£21.6
District Centre: Old Town	1.0%	£0.1	£0.1	£0.1	£0.1	£0.1	£0.1
All Local Centres / All Other Shops	1.0%	£16.2	£16.2	£16.4	£16.8	£17.1	£17.5
All Out-of-Centre Locations	3.0%	£174.1	£174.1	£176.7	£180.2	£183.9	£188.3
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN THE HASTINGS BOROUGH COUNCIL AREA		£273.2	£273.2	£277.2	£282.7	£288.5	£295.4

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE

	CENTRE	PLANNING REF	LOCATION	Gross Floor space (sq m)	Net Floor space (sq m)	2024 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)					
							2024	2025	2030	2035	2040	2045
1	St Leonards: Out-of-Centre	HS/FA/21/00003	Ashdown House, Sedlescombe Road North, St Leonards-on-sea, TN37 7PB.	1,918	1,075	11,000	-	-	£11.9	£12.1	£12.3	£12.5
HASTINGS BOROUGH COUNCIL AREA TOTAL							-	-	£11.9	£12.1	£12.3	£12.5

Notes

- 1 HS/FA/21/00003 - Erection of a total of 151 no. dwellings (C3) and a 188 sqm community centre (Use Class F2(b)) accessed from Harrow Lane, together with a 1,918 sqm food retail store (Use Class E(a)) accessed from Sedlescombe Road North, and associated car parking, landscaping and servicing areas following demolition of the existing buildings (amended description). Aldi application, as per planning and retail statement Gross Area of 1,918sqm; netted down to a net sales area of 1,343sqm net (using a gross to net ratio of 70%) of which 1,075 sqm net (80%) is for convenience goods and 268 sqm net (20%) is for comparison goods.

TABLE 4: HASTINGS BOROUGH COUNCIL AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£273.2	£273.2	£277.2	£282.7	£288.5	£295.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£273.2	£272.7	£275.4	£279.5	£283.8	£288.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£1.9	£3.2	£4.7	£7.4
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£11.9	£12.1	£12.3	£12.5
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	-£10.1	-£8.9	-£7.6	-£5.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	-908	-791	-664	-439
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-1,297	-1,131	-948	-627

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2030.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket and Limited Assortment Discount (LAD) operators.

TABLE 5: TOWN CENTRE: HASTINGS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£57.5	£57.5	£58.4	£59.5	£60.7	£62.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£57.5	£57.4	£58.0	£58.9	£59.7	£60.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£0.4	£0.7	£1.0	£1.6
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£0.4	£0.7	£1.0	£1.6
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	35	60	87	134
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			50	85	124	191

TABLE 6: DISTRICT CENTRE: ST LEONARDS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£5.3	£5.3	£5.3	£5.4	£5.6	£5.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£5.3	£5.3	£5.3	£5.4	£5.5	£5.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£0.0	£0.1	£0.1	£0.1
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£0.0	£0.1	£0.1	£0.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	3	5	8	12

TABLE 7: DISTRICT CENTRE: SILVERHILL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (€m):	€20.0	€20.0	€20.3	€20.7	€21.1	€21.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (€m):	€20.0	€20.0	€20.2	€20.5	€20.8	€21.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (€m):	-	-	€0.1	€0.2	€0.3	€0.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (€m)	-	-	€0.0	€0.0	€0.0	€0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	€0.1	€0.2	€0.3	€0.5
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	12	21	30	47
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			18	30	43	67

TABLE 8: DISTRICT CENTRE: OLD TOWN - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (€m):	€0.1	€0.1	€0.1	€0.1	€0.1	€0.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (€m):	€0.1	€0.1	€0.1	€0.1	€0.1	€0.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (€m):	-	-	€0.0	€0.0	€0.0	€0.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (€m)	-	-	€0.0	€0.0	€0.0	€0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	€0.0	€0.0	€0.0	€0.0
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	0	0	0	0
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			0	0	0	0

TABLE 9: ALL LOCAL CENTRES / ALL OTHER SHOPS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (€m):	€16.2	€16.2	€16.4	€16.8	€17.1	€17.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (€m):	€16.2	€16.2	€16.3	€16.6	€16.8	€17.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (€m):	-	-	€0.1	€0.2	€0.3	€0.4
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (€m)	-	-	€0.0	€0.0	€0.0	€0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	€0.1	€0.2	€0.3	€0.4
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	10	17	24	38

TABLE 10: ALL OUT-OF-CENTRE FLOORSPACE IN THE HASTINGS BOROUGH COUNCIL AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (€m):	£174.1	£174.1	£176.7	£180.2	£183.9	£188.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (€m):	£174.1	£173.8	£175.5	£178.2	£180.9	£183.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (€m):	-	-	£1.2	£2.0	£3.0	£4.7
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (€m)	-	-	£11.9	£12.1	£12.3	£12.5
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	-£10.7	-£10.1	-£9.3	-£7.8
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£11,000	£10,978	£11,088	£11,256	£11,425	£11,598
	(ii) Net Floorspace Capacity (sq m):	-	-	-968	-894	-813	-670
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-1,383	-1,277	-1,161	-957

SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW FLOORSPACE (NET SQ M)

	2030	2035	2040	2045
Town Centre: Hastings	35	60	87	134
District Centre: St Leonards	3	5	8	12
District Centre: Silverhill	12	21	30	47
District Centre: Old Town	0	0	0	0
All Local Centres / All Other Shops	10	17	24	38
All Out-of-Centre Locations	-968	-894	-813	-670
GRAND TOTAL: HASTINGS BOROUGH COUNCIL AREA	-908	-791	-664	-439

**Appendix 6: Population and Expenditure:
Comparison Goods**

ZONE:	2024	2025	2030	2035	2040	2045	GROWTH 2024 to 2045 (%)	
	2024	2025	2030	2035	2040	2045	2024 2035	2024 2045
Zone 1	18,743	18,870	19,383	19,827	20,265	20,745	5.8%	10.7%
Zone 2	32,130	32,286	33,231	34,027	34,583	35,307	5.9%	9.9%
Zone 3	9,118	9,217	9,557	9,895	10,248	10,637	8.5%	16.7%
Zone 4	13,746	13,861	14,420	14,872	15,378	15,942	8.2%	16.0%
Zone 5	17,120	17,252	17,759	18,142	18,476	18,897	6.0%	10.4%
Zone 6	7,536	7,582	7,777	7,941	8,051	8,206	5.4%	8.9%
Zone 7	61,652	61,706	62,041	62,440	62,930	63,435	1.3%	2.9%
Zone 8	29,264	29,289	29,496	29,847	30,219	30,593	2.0%	4.5%
Zone 9	6,169	6,199	6,395	6,606	6,800	7,008	7.1%	13.6%
Study Area	195,478	196,262	200,059	203,597	206,950	210,770	4.2%	7.8%

Source: EXPERIAN BUSINESS STRATEGIES

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

TABLE 2: REVISED COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2024	2024	2025	2030	2035	2040	2045
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
EXPERIAN - SPECIAL FORMS OF TRADING (%):		24.3%	25.5%	27.8%	29.1%	29.7%	29.7%
REVISED SPECIAL FORMS OF TRADING (%):		27.4%	28.7%	31.3%	32.8%	33.4%	33.4%
Zone 1	£3,560	£2,586	£2,606	£2,926	£3,287	£3,736	£4,289
Zone 2	£3,720	£2,702	£2,724	£3,058	£3,435	£3,905	£4,483
Zone 3	£4,623	£3,358	£3,385	£3,800	£4,269	£4,852	£5,570
Zone 4	£4,380	£3,181	£3,206	£3,599	£4,044	£4,596	£5,277
Zone 5	£4,144	£3,010	£3,034	£3,405	£3,826	£4,349	£4,993
Zone 6	£4,040	£2,935	£2,958	£3,321	£3,731	£4,240	£4,868
Zone 7	£3,505	£2,546	£2,566	£2,881	£3,237	£3,679	£4,224
Zone 8	£3,473	£2,523	£2,543	£2,854	£3,207	£3,645	£4,184
Zone 9	£3,629	£2,636	£2,657	£2,982	£3,351	£3,808	£4,372
STUDY AREA AVERAGE:	£3,897	£2,831	£2,853	£3,203	£3,599	£4,090	£4,696

Source: Average spend per capita estimates (2022 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 21 published by Experian Business Strategies (February 2024).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the Retail Planner Briefing Note 21 (February 2024).

	2024	2024	2025	2030	2035	2040	2045	GROWTH 2024 to 2045 (%)	
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING						2024 2035	2024 2045
Zone 1	66.7	48.5	49.2	56.7	65.2	75.7	89.0	34.5%	83.6%
Zone 2	119.5	86.8	87.9	101.6	116.9	135.0	158.3	34.6%	82.3%
Zone 3	42.2	30.6	31.2	36.3	42.2	49.7	59.3	38.0%	93.5%
Zone 4	60.2	43.7	44.4	51.9	60.1	70.7	84.1	37.5%	92.4%
Zone 5	70.9	51.5	52.3	60.5	69.4	80.3	94.3	34.7%	83.1%
Zone 6	30.4	22.1	22.4	25.8	29.6	34.1	40.0	34.0%	80.6%
Zone 7	216.1	157.0	158.4	178.7	202.1	231.5	267.9	28.8%	70.7%
Zone 8	101.6	73.8	74.5	84.2	95.7	110.1	128.0	29.7%	73.4%
Zone 9	22.4	16.3	16.5	19.1	22.1	25.9	30.6	36.1%	88.4%
STUDY AREA:	730.1	530.3	536.8	614.8	703.5	813.2	951.5	32.6%	79.4%

**Appendix 7: Comparison Goods Market Shares
(including SFT)**

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Including SFT) (%)

Including Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	4.6%	6.1%	1.0%	9.8%	12.6%	19.2%	25.7%	14.0%	0.1%	14.1%
DISTRICT CENTRE: ST LEONARDS	0.2%	0.4%	0.0%	1.3%	0.7%	2.7%	2.2%	7.5%	0.0%	2.1%
DISTRICT CENTRE: SILVERHILL	0.2%	0.4%	0.4%	1.0%	1.3%	1.4%	2.0%	1.0%	0.0%	1.1%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.2%	1.8%	0.4%	0.0%	0.0%	0.2%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.0%	0.1%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.2%	0.8%	0.3%	0.3%	0.0%	0.0%	0.2%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	1.4%	2.5%	0.2%	0.6%	0.5%	1.4%	1.3%	0.9%	0.0%	1.3%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	1.8%	0.6%	1.3%	4.4%	1.9%	4.2%	1.9%	5.5%	0.0%	2.4%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%	0.4%	0.0%	0.2%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.3%	0.5%	2.5%	1.9%	4.0%	2.1%	1.0%	0.0%	1.4%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.4%	1.5%	0.6%	4.9%	0.9%	3.7%	4.6%	6.4%	0.0%	3.2%
All Other Out-of-Centre Shops / Stores	0.2%	0.0%	0.1%	1.3%	0.0%	0.6%	0.7%	0.9%	0.0%	0.5%
HASTINGS BOROUGH COUNCIL AREA	8.6%	11.7%	4.2%	26.0%	20.9%	40.3%	42.0%	37.7%	0.1%	26.8%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.1%	0.2%	0.5%	10.7%	1.1%	0.5%	0.1%	33.4%	2.2%
Bexhill-on-Sea	19.6%	16.4%	0.2%	1.3%	0.2%	0.7%	1.1%	1.0%	0.0%	5.2%
Bexhill-on-Sea: Ravenside Retail Park	32.9%	25.5%	1.2%	13.9%	4.8%	12.4%	13.0%	13.1%	0.2%	15.5%
Eastbourne	10.3%	13.9%	5.1%	1.7%	1.1%	2.5%	3.8%	3.3%	0.1%	5.6%
Royal Tunbridge Wells	0.2%	0.3%	28.8%	7.5%	1.8%	1.6%	0.8%	0.6%	0.0%	2.5%
Hawkhurst	0.0%	0.0%	2.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Heathfield	0.0%	0.0%	5.5%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
All Other Centres / Stores	1.3%	3.6%	14.1%	11.5%	18.3%	4.8%	3.3%	3.2%	23.5%	6.3%
Sub-Total	64.4%	59.8%	57.3%	37.1%	36.9%	23.0%	22.4%	21.3%	57.2%	37.8%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	27.0%	28.5%	38.5%	36.9%	42.2%	36.7%	35.6%	41.0%	42.7%	35.4%
TOTAL	100%									

TABLE 2: CLOTHING & FOOTWEAR - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	10.6%	14.1%	1.8%	12.5%	17.8%	23.5%	20.9%	22.0%	0.6%	16.6%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.3%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.0%	1.7%	3.3%	2.9%	3.1%	1.5%	0.0%	1.7%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.1%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	1.3%	0.0%	1.9%	0.0%	0.0%	0.0%	2.0%	0.0%	0.6%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	3.8%	0.4%	0.0%	0.0%	0.0%	0.0%	0.3%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.4%	0.0%	2.1%	3.5%	7.6%	2.2%	0.5%	0.0%	1.6%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.0%	0.0%	0.0%	4.9%	1.6%	0.0%	3.6%	4.0%	0.0%	2.2%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	10.6%	15.9%	1.8%	26.9%	28.4%	34.7%	29.8%	31.9%	0.6%	23.4%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	2.1%	8.4%	0.0%	1.2%	0.0%	19.7%	1.9%
Bexhill-on-Sea	12.2%	10.2%	0.0%	2.1%	0.0%	0.0%	1.4%	0.5%	0.0%	3.5%
Bexhill-on-Sea: Ravenside Retail Park	21.1%	10.3%	1.2%	7.4%	3.0%	6.4%	7.6%	6.6%	0.0%	8.2%
Eastbourne	12.6%	19.5%	8.7%	2.6%	0.9%	5.0%	6.0%	3.9%	0.0%	7.8%
Royal Tunbridge Wells	0.0%	0.0%	25.7%	8.2%	2.2%	1.4%	0.4%	0.5%	0.0%	2.3%
Hawkhurst	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Heathfield	0.0%	0.0%	2.3%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
All Other Centres / Stores	2.0%	4.5%	8.1%	7.2%	7.1%	7.2%	4.4%	5.2%	23.5%	5.6%
Sub-Total	47.9%	44.5%	46.6%	30.1%	21.6%	20.0%	21.0%	16.7%	43.2%	29.6%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	41.5%	39.7%	51.6%	43.0%	50.0%	45.3%	49.1%	51.5%	56.2%	47.0%
TOTAL	100%									

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Including SFT) (%)

TABLE 3: RECORDING MEDIA - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	1.4%	5.2%	0.0%	14.9%	12.4%	31.9%	43.0%	11.3%	0.0%	20.9%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.2%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.2%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	5.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.0%	3.4%	0.0%	3.9%	0.0%	8.5%	0.0%	1.3%	0.0%	1.4%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	6.3%	8.6%	0.0%	27.8%	12.4%	44.9%	43.0%	13.9%	0.0%	23.8%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	1.8%	0.4%
Bexhill-on-Sea	15.5%	13.7%	0.0%	1.2%	0.0%	0.0%	4.1%	0.0%	0.0%	5.2%
Bexhill-on-Sea: Ravenside Retail Park	8.8%	12.1%	0.0%	9.1%	1.4%	0.0%	2.8%	7.9%	0.0%	5.6%
Eastbourne	4.4%	15.6%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	3.3%
Royal Tunbridge Wells	0.0%	0.0%	18.2%	4.5%	5.7%	0.0%	0.0%	0.0%	0.0%	1.5%
Hawkhurst	0.0%	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Heathfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Centres / Stores	0.0%	3.6%	1.9%	0.0%	6.5%	0.0%	6.4%	4.2%	10.4%	4.2%
Sub-Total	28.6%	45.1%	26.9%	14.8%	18.2%	0.0%	14.1%	12.1%	12.2%	20.5%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	65.0%	46.3%	73.1%	57.3%	69.4%	55.1%	42.8%	74.0%	87.8%	55.6%
TOTAL	100%									

TABLE 4: DOMESTIC ELECTRICAL - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	0.5%	2.6%	0.0%	1.6%	6.7%	2.0%	8.3%	0.5%	0.0%	3.9%
DISTRICT CENTRE: ST LEONARDS	2.5%	3.2%	0.0%	10.6%	6.4%	23.6%	20.2%	22.5%	0.0%	12.5%
DISTRICT CENTRE: SILVERHILL	1.6%	0.0%	0.0%	0.0%	1.3%	2.1%	1.8%	4.3%	0.0%	1.5%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	0.0%	0.6%	2.4%	0.4%	0.7%	1.7%	0.0%	0.0%	0.8%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.6%	2.1%	5.9%	0.0%	2.8%	3.8%	0.0%	2.2%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.0%	0.0%	0.0%	3.9%	1.3%	2.7%	2.5%	1.9%	0.0%	1.5%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	2.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.2%
HASTINGS BOROUGH COUNCIL AREA	4.6%	5.7%	1.8%	23.1%	23.9%	31.8%	37.3%	33.0%	0.0%	22.9%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	2.2%	0.0%	6.2%	0.0%	0.0%	0.0%	39.2%	2.0%
Bexhill-on-Sea	7.1%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	1.8%
Bexhill-on-Sea: Ravenside Retail Park	62.0%	35.2%	4.2%	27.2%	13.1%	30.8%	22.9%	27.6%	0.0%	27.3%
Eastbourne	5.8%	10.3%	2.4%	1.6%	1.3%	0.7%	1.4%	0.5%	0.0%	3.2%
Royal Tunbridge Wells	0.0%	0.0%	35.7%	3.0%	1.3%	0.0%	0.0%	0.0%	0.0%	2.2%
Hawkhurst	0.0%	0.0%	0.6%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Heathfield	0.0%	0.0%	12.6%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
All Other Centres / Stores	0.0%	2.1%	1.2%	0.5%	0.4%	0.7%	0.0%	1.6%	15.6%	1.2%
Sub-Total	74.9%	54.2%	59.0%	37.5%	22.4%	32.2%	24.3%	30.1%	54.8%	38.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	20.5%	40.0%	39.3%	39.4%	53.7%	36.0%	38.4%	36.9%	45.2%	38.5%
TOTAL	100%									

TABLE 5: AUDIO VISUAL, PHOTOGRAPHIC & COMPUTER ITEMS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	0.6%	1.5%	1.3%	3.3%	8.7%	3.7%	5.5%	2.9%	0.0%	3.7%
DISTRICT CENTRE: ST LEONARDS	0.6%	1.5%	0.7%	2.3%	1.5%	9.3%	5.4%	15.6%	0.0%	5.0%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	0.0%	1.3%	0.0%	0.5%	0.7%	2.1%	0.0%	0.0%	0.8%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.5%	0.0%	0.1%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	2.0%	3.4%	0.0%	4.8%	0.5%	4.4%	7.3%	2.1%	0.0%	3.8%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	3.1%	6.4%	3.4%	10.4%	11.1%	19.6%	20.3%	21.1%	0.0%	13.3%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	43.8%	2.0%
Bexhill-on-Sea	6.1%	2.5%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	1.5%
Bexhill-on-Sea: Ravenside Retail Park	55.7%	41.6%	5.4%	30.0%	11.6%	27.6%	24.8%	32.3%	0.0%	29.2%
Eastbourne	7.5%	7.6%	2.1%	0.0%	1.5%	0.0%	0.5%	1.7%	0.0%	2.6%
Royal Tunbridge Wells	0.0%	1.0%	29.7%	6.3%	1.5%	0.0%	0.5%	0.0%	0.0%	2.3%
Hawkhurst	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Heathfield	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Centres / Stores	0.0%	3.4%	7.2%	0.0%	4.8%	0.7%	0.5%	1.7%	9.2%	2.1%
Sub-Total	69.3%	56.2%	45.8%	36.2%	25.5%	28.3%	27.4%	36.2%	53.0%	39.8%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	27.6%	37.4%	50.8%	53.4%	63.4%	52.0%	52.3%	42.8%	47.0%	46.8%
TOTAL	100%									

TABLE 6: BOOKS, STATIONERY & DRAWING MATERIALS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	8.3%	6.9%	1.3%	6.2%	14.4%	42.2%	54.7%	32.6%	0.0%	27.2%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	4.1%	0.0%	0.7%
DISTRICT CENTRE: SILVERHILL	1.7%	0.0%	0.0%	0.0%	0.0%	0.7%	3.6%	0.5%	0.0%	1.4%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	2.1%	1.1%	2.2%	1.4%	0.5%	0.0%	0.8%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%
Tesco Extra, Church Wood Drive	0.0%	1.9%	3.3%	3.6%	1.1%	9.4%	2.3%	11.5%	0.0%	3.7%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	10.0%	10.8%	4.7%	11.9%	16.6%	55.3%	62.0%	50.2%	0.0%	34.3%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	18.7%	0.7%
Bexhill-on-Sea	25.6%	27.5%	0.7%	0.7%	0.0%	0.0%	0.9%	0.5%	0.0%	7.5%
Bexhill-on-Sea: Ravenside Retail Park	22.7%	7.6%	0.0%	0.7%	0.0%	3.0%	1.7%	0.5%	0.0%	4.3%
Eastbourne	6.4%	8.4%	3.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
Royal Tunbridge Wells	0.0%	1.7%	13.4%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Hawkhurst	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Heathfield	0.0%	0.0%	2.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
All Other Centres / Stores	0.0%	1.6%	19.3%	23.2%	35.5%	4.9%	1.7%	5.0%	27.3%	8.1%
Sub-Total	54.8%	46.7%	40.6%	32.7%	37.4%	7.9%	4.2%	6.0%	45.9%	24.5%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	35.2%	42.5%	54.7%	55.4%	46.0%	36.9%	33.8%	43.8%	54.1%	41.2%
TOTAL	100%									

TABLE 7: PET PRODUCTS, HOBBY ITEMS, SPORTSWEAR, CAMPING, CYCLING & MUSICAL INSTRUMENTS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	2.8%	4.5%	0.8%	9.7%	15.3%	11.9%	31.5%	1.3%	0.0%	13.6%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	2.3%	0.0%	2.6%	0.5%	0.7%	0.0%	0.5%
DISTRICT CENTRE: SILVERHILL	0.0%	1.7%	0.8%	0.0%	0.0%	0.8%	0.5%	0.0%	0.0%	0.5%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	3.9%	0.0%	0.0%	2.7%	0.0%	1.7%	0.0%	0.0%	1.5%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	2.1%	0.0%	0.8%	10.3%	4.9%	14.2%	4.3%	18.9%	0.0%	5.9%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	1.7%	0.0%	0.8%	2.0%	0.8%	4.0%	0.0%	0.0%	1.8%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.7%	2.5%	0.8%	5.6%	0.0%	4.7%	4.6%	2.0%	0.0%	2.8%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	1.6%	0.0%	0.0%	0.7%
HASTINGS BOROUGH COUNCIL AREA	5.6%	14.2%	3.4%	32.3%	24.9%	37.5%	48.6%	23.0%	0.0%	27.4%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	10.2%	5.1%	1.7%	0.0%	32.7%	2.7%
Bexhill-on-Sea	18.2%	12.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.7%	0.0%	4.0%
Bexhill-on-Sea: Ravenside Retail Park	32.1%	30.7%	0.0%	15.5%	4.3%	6.9%	5.7%	10.0%	0.0%	13.4%
Eastbourne	6.0%	7.8%	7.4%	0.0%	1.7%	3.5%	3.8%	1.3%	0.0%	4.0%
Royal Tunbridge Wells	0.0%	0.0%	27.8%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	1.5%
Hawkhurst	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Heathfield	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
All Other Centres / Stores	0.7%	0.0%	15.1%	5.8%	13.6%	3.0%	1.9%	2.8%	21.0%	4.2%
Sub-Total	57.0%	50.5%	56.3%	22.9%	29.9%	18.5%	13.6%	14.9%	53.8%	30.2%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	37.4%	35.2%	40.3%	44.8%	45.2%	43.9%	37.8%	62.2%	46.2%	42.5%
TOTAL	100%									

TABLE 8: FURNITURE, CARPETS, OTHER FLOOR COVERINGS AND HOUSEHOLD TEXTILES - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	2.8%	2.9%	0.9%	14.7%	11.0%	13.7%	15.4%	8.3%	0.0%	9.2%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.6%	0.0%	1.7%	1.1%	3.6%	0.0%	11.5%	0.0%	2.0%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.9%	2.5%	0.0%	1.8%	1.7%	0.0%	0.0%	0.8%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	7.9%	8.1%	0.9%	0.0%	0.0%	8.0%	4.8%	2.2%	0.0%	4.3%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	8.1%	2.7%	1.8%	9.1%	4.3%	10.2%	7.1%	12.9%	0.0%	6.7%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.7%	0.0%	0.3%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.7%	3.0%	0.0%	1.0%
HASTINGS BOROUGH COUNCIL AREA	18.7%	14.3%	4.5%	28.0%	18.2%	40.1%	30.7%	38.6%	0.0%	24.3%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.8%	21.1%	0.0%	0.0%	0.0%	25.0%	3.1%
Bexhill-on-Sea	18.9%	20.4%	0.0%	0.8%	0.0%	4.6%	1.1%	4.1%	0.0%	6.6%
Bexhill-on-Sea: Ravenside Retail Park	11.7%	8.5%	0.0%	2.7%	0.6%	5.2%	8.9%	6.0%	0.0%	6.6%
Eastbourne	27.3%	27.9%	5.5%	3.1%	0.0%	6.4%	12.1%	11.6%	0.0%	13.6%
Royal Tunbridge Wells	0.0%	0.6%	43.3%	21.3%	4.8%	6.4%	2.6%	2.9%	0.0%	5.4%
Hawkhurst	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Heathfield	0.0%	0.0%	9.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
All Other Centres / Stores	0.0%	5.9%	6.5%	14.5%	7.3%	2.7%	6.6%	0.0%	41.5%	6.4%
Sub-Total	57.8%	63.3%	67.9%	43.3%	33.8%	25.2%	31.4%	24.6%	66.5%	42.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	23.5%	22.4%	27.6%	28.7%	48.1%	34.7%	38.0%	36.8%	33.5%	33.4%
TOTAL	100%									

TABLE 9: DIY GOODS, DECORATING SUPPLIES AND GARDEN PRODUCTS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	0.6%	2.0%	0.0%	7.0%	4.1%	4.3%	8.0%	4.6%	0.0%	4.6%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	0.0%	1.5%	0.7%	2.1%	6.7%	0.0%	1.8%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.3%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	2.2%	0.0%	0.0%	0.0%	2.3%	2.2%	0.0%	0.0%	1.2%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	3.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.2%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.0%	0.0%	0.0%	0.7%	0.0%	0.7%	0.0%	0.5%	0.0%	0.1%
All Other Out-of-Centre Shops / Stores	2.6%	0.5%	1.3%	6.4%	0.0%	3.6%	4.1%	6.8%	0.0%	3.2%
HASTINGS BOROUGH COUNCIL AREA	3.1%	4.7%	1.3%	17.7%	6.1%	11.6%	17.6%	18.6%	0.0%	11.5%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	26.9%	0.7%	0.0%	0.0%	78.2%	5.1%
Bexhill-on-Sea	2.8%	6.6%	0.0%	0.7%	0.0%	0.0%	1.5%	1.7%	0.0%	2.1%
Bexhill-on-Sea: Ravenside Retail Park	83.8%	78.5%	3.8%	47.2%	16.8%	61.1%	67.6%	64.4%	2.2%	58.9%
Eastbourne	8.1%	7.7%	2.6%	4.2%	1.5%	0.0%	0.0%	1.6%	0.0%	2.8%
Royal Tunbridge Wells	0.0%	0.5%	37.6%	8.1%	1.5%	0.0%	0.0%	0.0%	0.0%	2.7%
Hawkhurst	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Heathfield	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres / Stores	1.1%	0.5%	34.3%	14.2%	33.3%	7.2%	7.1%	0.0%	8.5%	8.7%
Sub-Total	95.8%	93.8%	89.0%	74.3%	80.0%	69.0%	76.2%	67.7%	88.9%	80.9%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	1.1%	1.5%	9.7%	8.0%	13.9%	19.4%	6.1%	13.7%	11.1%	7.6%
TOTAL	100%									

TABLE 10: PERSONAL CARE PRODUCTS AND GOODS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	2.3%	2.2%	1.8%	5.1%	14.2%	34.7%	38.5%	25.0%	0.0%	19.6%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	8.7%	0.0%	2.2%
DISTRICT CENTRE: SILVERHILL	0.0%	1.3%	0.6%	1.6%	6.1%	0.7%	2.7%	1.4%	0.0%	2.0%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.8%	0.7%	0.0%	0.0%	0.0%	0.1%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.2%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%
Aldi, Rye Road	0.0%	0.0%	0.0%	1.8%	6.5%	2.1%	2.3%	0.0%	0.0%	1.6%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	1.5%	0.0%	0.0%	0.4%	0.0%	0.0%	0.5%	0.0%	0.4%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.4%	4.6%	3.1%	3.5%	0.0%	1.7%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	2.4%	9.6%	2.9%	13.8%	2.5%	3.6%	0.0%	2.8%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%
Tesco Extra, Church Wood Drive	0.5%	4.7%	3.0%	17.2%	3.2%	14.1%	15.1%	22.4%	0.0%	11.1%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	2.8%	9.7%	7.8%	35.8%	34.6%	70.7%	67.8%	65.8%	0.0%	41.9%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	33.4%	1.2%
Bexhill-on-Sea	41.0%	32.9%	0.6%	4.7%	1.3%	0.0%	1.1%	0.0%	0.0%	10.1%
Bexhill-on-Sea: Ravenside Retail Park	41.1%	40.8%	0.6%	12.7%	2.8%	5.0%	14.2%	10.7%	0.0%	18.0%
Eastbourne	2.3%	4.9%	3.0%	0.5%	1.5%	0.0%	0.0%	0.0%	0.6%	1.4%
Royal Tunbridge Wells	0.0%	0.0%	23.0%	3.9%	0.8%	0.7%	0.4%	0.0%	0.0%	1.6%
Hawkhurst	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Heathfield	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
All Other Centres / Stores	0.5%	3.6%	14.3%	17.2%	38.5%	3.9%	1.1%	4.3%	24.6%	7.9%
Sub-Total	84.8%	82.2%	49.2%	39.0%	47.8%	9.6%	16.8%	15.0%	58.6%	40.6%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	12.4%	8.1%	43.1%	25.2%	17.6%	19.7%	15.4%	19.2%	41.4%	17.5%
TOTAL	100%									

TABLE 11: MEDICAL GOODS - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	0.5%	3.3%	0.6%	5.9%	7.1%	24.1%	40.5%	16.0%	0.0%	17.8%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	4.0%	19.7%	0.0%	4.3%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	0.0%	1.5%	1.4%	2.7%	8.9%	6.2%	0.0%	4.1%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.5%	0.9%	25.3%	8.1%	0.0%	0.0%	3.6%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	3.5%	0.0%	1.8%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.1%	0.0%	0.0%	0.4%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.1%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.4%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	3.7%	0.0%	0.0%	1.3%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	0.0%	8.3%	0.9%	10.9%	5.6%	3.5%	0.0%	3.3%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.5%	1.6%	0.6%	10.5%	3.0%	7.8%	11.1%	25.3%	0.0%	8.9%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%
HASTINGS BOROUGH COUNCIL AREA	0.9%	5.4%	1.2%	26.8%	13.2%	74.6%	88.0%	75.6%	0.0%	46.1%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	17.4%	0.7%
Bexhill-on-Sea	46.2%	43.3%	0.6%	3.1%	1.6%	0.7%	1.5%	0.0%	0.0%	12.3%
Bexhill-on-Sea: Ravenside Retail Park	40.6%	35.2%	1.2%	9.8%	3.0%	3.4%	7.1%	8.2%	0.0%	14.2%
Eastbourne	1.7%	3.5%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Royal Tunbridge Wells	0.0%	0.0%	10.4%	3.9%	0.4%	0.7%	0.0%	0.0%	0.0%	0.9%
Hawkhurst	0.0%	0.0%	17.7%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Heathfield	0.0%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
All Other Centres / Stores	7.7%	8.3%	40.9%	47.8%	73.4%	9.5%	1.2%	4.2%	71.3%	17.5%
Sub-Total	96.3%	90.3%	85.4%	67.6%	80.0%	14.2%	9.8%	12.4%	88.7%	48.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	2.8%	4.3%	13.5%	5.6%	6.8%	11.2%	2.2%	12.0%	11.3%	5.9%
TOTAL	100%									

TABLE 12: ALL OTHER GOODS (JEWELLERY, GLASSWARE, TABLEWARE HOUSEHOLD UTENSILS) - 2024 MARKET SHARE ANALYSIS (%)

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	9.5%	10.4%	0.0%	14.8%	14.1%	31.5%	37.8%	20.8%	0.0%	20.7%
DISTRICT CENTRE: ST LEONARDS	0.0%	0.0%	0.0%	1.1%	0.0%	2.2%	2.8%	6.3%	0.0%	2.0%
DISTRICT CENTRE: SILVERHILL	0.0%	0.0%	1.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	3.4%	2.2%	10.3%	2.2%	3.4%	6.7%	3.0%	12.1%	0.0%	4.8%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.0%	4.0%	6.1%	0.0%	4.4%	4.4%	0.0%	0.0%	2.0%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.7%	1.8%	0.0%	3.4%	0.7%	1.1%	2.8%	9.4%	0.0%	3.1%
All Other Out-of-Centre Shops / Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
HASTINGS BOROUGH COUNCIL AREA	13.6%	14.4%	15.3%	28.7%	18.2%	46.1%	51.5%	48.6%	0.0%	32.8%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	0.0%	0.6%	1.0%	0.0%	8.4%	2.2%	0.0%	0.7%	45.2%	2.3%
Bexhill-on-Sea	26.8%	14.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%
Bexhill-on-Sea: Ravenside Retail Park	23.1%	9.7%	0.0%	5.0%	0.7%	0.0%	4.1%	3.1%	0.0%	6.2%
Eastbourne	7.4%	18.0%	3.0%	2.2%	3.1%	0.0%	1.2%	3.1%	0.0%	5.5%
Royal Tunbridge Wells	2.5%	0.0%	26.4%	6.1%	2.2%	3.3%	2.5%	0.7%	0.0%	3.0%
Hawkhurst	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Heathfield	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
All Other Centres / Stores	3.2%	4.6%	14.3%	8.6%	16.3%	6.7%	2.2%	5.4%	15.2%	5.9%
Sub-Total	62.9%	47.8%	48.7%	21.9%	30.7%	12.3%	10.1%	12.9%	60.4%	28.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	23.4%	37.8%	36.0%	49.5%	51.1%	41.7%	38.4%	38.6%	39.6%	38.5%
TOTAL	100%									

**Appendix 8: Comparison Goods Turnover
(excluding SFT)**

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 1: ALL COMPARISON GOODS - 2024 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	6.3%	8.5%	1.6%	15.5%	21.9%	30.4%	39.8%	23.7%	0.2%	21.8%
DISTRICT CENTRE: ST LEONARDS	0.2%	0.5%	0.1%	2.1%	1.1%	4.3%	3.3%	12.7%	0.0%	3.2%
DISTRICT CENTRE: SILVERHILL	0.2%	0.5%	0.7%	1.6%	2.3%	2.2%	3.1%	1.7%	0.0%	1.7%
DISTRICT CENTRE: OLD TOWN	0.0%	0.0%	0.0%	0.0%	0.3%	2.8%	0.7%	0.0%	0.0%	0.4%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%	0.0%	0.2%
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Aldi, Rye Road	0.0%	0.0%	0.0%	0.2%	1.4%	0.5%	0.5%	0.0%	0.0%	0.3%
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	1.9%	3.4%	0.4%	0.9%	0.9%	2.2%	2.1%	1.5%	0.0%	1.9%
Blackbrooks Garden Centre, Bexhill Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	2.5%	0.8%	2.0%	6.9%	3.3%	6.7%	3.0%	9.3%	0.0%	3.6%
Lidl, Bohemia Road, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.1%	1.1%	0.8%	0.6%	0.0%	0.4%
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	0.0%	0.4%	0.9%	4.0%	3.3%	6.4%	3.3%	1.6%	0.0%	2.1%
Tesco Express, Fernside Avenue, St Leonards-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Tesco Extra, Church Wood Drive	0.5%	2.1%	1.0%	7.8%	1.6%	5.9%	7.1%	10.9%	0.0%	5.0%
All Other Out-of-Centre Shops / Stores	0.2%	0.1%	0.2%	2.0%	0.0%	0.9%	1.1%	1.5%	0.0%	0.8%
HASTINGS BOROUGH COUNCIL AREA	11.8%	16.4%	6.8%	41.2%	36.1%	63.6%	65.2%	63.9%	0.2%	41.5%
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Asnford	0.0%	0.1%	0.3%	0.9%	18.5%	1.7%	0.8%	0.1%	58.3%	3.5%
Bexhill-on-Sea	26.9%	23.0%	0.3%	2.1%	0.3%	1.1%	1.6%	1.6%	0.0%	8.1%
Bexhill-on-Sea: Ravenside Retail Park	45.0%	35.7%	2.0%	22.0%	8.3%	19.7%	20.1%	22.2%	0.4%	24.0%
Eastbourne	14.1%	19.5%	8.2%	2.7%	2.0%	4.0%	5.9%	5.6%	0.1%	8.7%
Royal Tunbridge Wells	0.3%	0.4%	46.9%	11.8%	3.1%	2.5%	1.2%	1.1%	0.0%	3.9%
Hawkhurst	0.0%	0.0%	3.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Heathfield	0.0%	0.0%	9.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
All Other Centres / Stores	1.8%	5.0%	22.9%	18.3%	31.6%	7.5%	5.1%	5.5%	41.0%	9.7%
Sub-Total	88.2%	83.6%	93.2%	58.8%	63.9%	36.4%	34.8%	36.1%	99.8%	58.5%
TOTAL	100%									

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 2: 2024 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£3.0	£7.4	£0.5	£6.8	£11.3	£6.7	£62.5	£17.5	£0.0	£115.6
DISTRICT CENTRE: ST LEONARDS	£0.1	£0.4	£0.0	£0.9	£0.6	£1.0	£5.3	£9.3	£0.0	£17.1
DISTRICT CENTRE: SILVERHILL	£0.1	£0.4	£0.2	£0.7	£1.2	£0.5	£4.9	£1.2	£0.0	£9.1
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.2	£0.6	£1.1	£0.0	£0.0	£1.9
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.2	£0.0	£0.9
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.7	£0.0	£0.0	£1.7
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£0.9	£3.0	£0.1	£0.4	£0.5	£0.5	£3.3	£1.1	£0.0	£10.3
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£1.2	£0.7	£0.6	£3.0	£1.7	£1.5	£4.7	£6.8	£0.0	£19.3
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.2	£0.4	£0.0	£1.9
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.4	£0.3	£1.7	£1.7	£1.4	£5.2	£1.2	£0.0	£11.4
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Tesco Extra, Church Wood Drive	£0.3	£1.8	£0.3	£3.4	£0.8	£1.3	£11.1	£8.1	£0.0	£26.5
All Other Out-of-Centre Shops / Stores	£0.1	£0.0	£0.1	£0.9	£0.0	£0.2	£1.7	£1.1	£0.0	£4.0
HASTINGS BOROUGH COUNCIL AREA	£5.7	£14.2	£2.1	£18.0	£18.6	£14.1	£102.3	£47.2	£0.0	£220.0
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.1	£0.4	£9.5	£0.4	£1.2	£0.1	£9.5	£18.4
Bexhill-on-Sea	£13.0	£19.9	£0.1	£0.9	£0.2	£0.2	£2.6	£1.2	£0.0	£43.0
Bexhill-on-Sea: Ravenside Retail Park	£21.8	£31.0	£0.6	£9.6	£4.3	£4.3	£31.6	£16.4	£0.1	£127.4
Eastbourne	£6.9	£16.9	£2.5	£1.2	£1.0	£0.9	£9.3	£4.1	£0.0	£46.0
Royal Tunbridge Wells	£0.1	£0.3	£14.4	£5.2	£1.6	£0.5	£2.0	£0.8	£0.0	£20.6
Hawkhurst	£0.0	£0.0	£1.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2
Heathfield	£0.0	£0.0	£2.8	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
All Other Centres / Stores	£0.9	£4.3	£7.0	£8.0	£16.3	£1.7	£8.0	£4.1	£6.7	£51.5
Sub-Total	£42.7	£72.6	£28.5	£25.7	£32.9	£8.0	£54.6	£26.7	£16.2	£310.3
TOTAL	£48.5	£86.8	£30.6	£43.7	£51.5	£22.1	£157.0	£73.8	£16.3	£530.3

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 3: 2025 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£3.1	£7.5	£0.5	£6.9	£11.4	£6.8	£63.1	£17.6	£0.0	£117.0
DISTRICT CENTRE: ST LEONARDS	£0.1	£0.4	£0.0	£0.9	£0.6	£1.0	£5.3	£9.4	£0.0	£17.4
DISTRICT CENTRE: SILVERHILL	£0.1	£0.4	£0.2	£0.7	£1.2	£0.5	£4.9	£1.2	£0.0	£9.2
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.2	£0.6	£1.1	£0.0	£0.0	£1.9
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.2	£0.0	£0.9
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.7	£0.0	£0.0	£1.7
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£0.9	£3.0	£0.1	£0.4	£0.5	£0.5	£3.3	£1.1	£0.0	£10.5
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£1.2	£0.7	£0.6	£3.1	£1.7	£1.5	£4.8	£6.9	£0.0	£19.6
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.2	£0.5	£0.0	£2.0
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.4	£0.3	£1.8	£1.7	£1.4	£5.2	£1.2	£0.0	£11.5
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Tesco Extra, Church Wood Drive	£0.3	£1.8	£0.3	£3.5	£0.8	£1.3	£11.2	£8.1	£0.0	£26.9
All Other Out-of-Centre Shops / Stores	£0.1	£0.0	£0.1	£0.9	£0.0	£0.2	£1.7	£1.1	£0.0	£4.1
HASTINGS BOROUGH COUNCIL AREA	£5.8	£14.4	£2.1	£18.3	£18.9	£14.3	£103.2	£47.6	£0.0	£222.7
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.1	£0.4	£9.7	£0.4	£1.2	£0.1	£9.6	£18.6
Bexhill-on-Sea	£13.2	£20.2	£0.1	£0.9	£0.2	£0.2	£2.6	£1.2	£0.0	£43.5
Bexhill-on-Sea: Ravenside Retail Park	£22.2	£31.4	£0.6	£9.8	£4.3	£4.4	£31.9	£16.6	£0.1	£129.0
Eastbourne	£7.0	£17.1	£2.6	£1.2	£1.0	£0.9	£9.4	£4.2	£0.0	£46.6
Royal Tunbridge Wells	£0.2	£0.4	£14.6	£5.3	£1.6	£0.5	£2.0	£0.8	£0.0	£20.8
Hawkhurst	£0.0	£0.0	£1.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2
Heathfield	£0.0	£0.0	£2.8	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
All Other Centres / Stores	£0.9	£4.4	£7.2	£8.1	£16.6	£1.7	£8.0	£4.1	£6.8	£52.1
Sub-Total	£43.4	£73.5	£29.1	£26.1	£33.4	£8.2	£55.1	£26.9	£16.4	£314.1
TOTAL	£49.2	£87.9	£31.2	£44.4	£52.3	£22.4	£158.4	£74.5	£16.5	£536.8

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 4: 2030 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£3.6	£8.7	£0.6	£8.0	£13.2	£7.9	£71.2	£19.9	£0.0	£134.0
DISTRICT CENTRE: ST LEONARDS	£0.1	£0.5	£0.0	£1.1	£0.7	£1.1	£6.0	£10.7	£0.0	£19.9
DISTRICT CENTRE: SILVERHILL	£0.1	£0.5	£0.2	£0.8	£1.4	£0.6	£5.6	£1.4	£0.0	£10.6
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£1.2	£0.0	£0.0	£2.2
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.3	£0.0	£1.1
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.1	£0.9	£0.1	£0.8	£0.0	£0.0	£1.9
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£1.1	£3.5	£0.1	£0.5	£0.6	£0.6	£3.7	£1.3	£0.0	£12.0
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£1.4	£0.8	£0.7	£3.6	£2.0	£1.7	£5.4	£7.8	£0.0	£22.4
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.4	£0.5	£0.0	£2.2
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.5	£0.3	£2.1	£2.0	£1.6	£5.9	£1.4	£0.0	£13.2
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Tesco Extra, Church Wood Drive	£0.3	£2.1	£0.4	£4.1	£1.0	£1.5	£12.7	£9.2	£0.0	£30.8
All Other Out-of-Centre Shops / Stores	£0.1	£0.1	£0.1	£1.0	£0.0	£0.2	£1.9	£1.2	£0.0	£4.7
HASTINGS BOROUGH COUNCIL AREA	£6.7	£16.6	£2.5	£21.4	£21.9	£16.4	£116.5	£53.8	£0.0	£255.0
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.1	£0.4	£11.2	£0.4	£1.4	£0.1	£11.1	£21.3
Bexhill-on-Sea	£15.2	£23.3	£0.1	£1.1	£0.2	£0.3	£2.9	£1.4	£0.0	£49.9
Bexhill-on-Sea: Ravenside Retail Park	£25.5	£36.3	£0.7	£11.4	£5.0	£5.1	£36.0	£18.7	£0.1	£147.7
Eastbourne	£8.0	£19.8	£3.0	£1.4	£1.2	£1.0	£10.6	£4.7	£0.0	£53.3
Royal Tunbridge Wells	£0.2	£0.4	£17.0	£6.1	£1.9	£0.6	£2.2	£0.9	£0.0	£23.9
Hawkhurst	£0.0	£0.0	£1.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4
Heathfield	£0.0	£0.0	£3.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6
All Other Centres / Stores	£1.0	£5.1	£8.3	£9.5	£19.1	£1.9	£9.1	£4.6	£7.8	£59.7
Sub-Total	£50.0	£85.0	£33.9	£30.5	£38.6	£9.4	£62.2	£30.4	£19.0	£359.8
TOTAL	£56.7	£101.6	£36.3	£51.9	£60.5	£25.8	£178.7	£84.2	£19.1	£614.8

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 5: 2035 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£4.1	£10.0	£0.7	£9.3	£15.2	£9.0	£80.5	£22.7	£0.0	£153.3
DISTRICT CENTRE: ST LEONARDS	£0.1	£0.6	£0.0	£1.3	£0.8	£1.3	£6.8	£12.1	£0.0	£22.7
DISTRICT CENTRE: SILVERHILL	£0.1	£0.6	£0.3	£0.9	£1.6	£0.7	£6.3	£1.6	£0.0	£12.1
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.2	£0.8	£1.4	£0.0	£0.0	£2.5
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.3	£0.0	£1.2
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.1	£1.0	£0.2	£0.9	£0.0	£0.0	£2.2
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£1.2	£4.0	£0.2	£0.5	£0.6	£0.7	£4.2	£1.4	£0.0	£13.7
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£1.6	£1.0	£0.9	£4.2	£2.3	£2.0	£6.1	£8.9	£0.0	£25.6
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.6	£0.6	£0.0	£2.6
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.5	£0.4	£2.4	£2.3	£1.9	£6.6	£1.6	£0.0	£15.1
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Tesco Extra, Church Wood Drive	£0.3	£2.4	£0.4	£4.7	£1.1	£1.8	£14.4	£10.4	£0.0	£35.2
All Other Out-of-Centre Shops / Stores	£0.2	£0.1	£0.1	£1.2	£0.0	£0.3	£2.2	£1.4	£0.0	£5.3
HASTINGS BOROUGH COUNCIL AREA	£7.7	£19.1	£2.9	£24.8	£25.1	£18.9	£131.8	£61.1	£0.0	£291.8
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.1	£0.5	£12.9	£0.5	£1.5	£0.1	£12.9	£24.4
Bexhill-on-Sea	£17.5	£26.8	£0.1	£1.3	£0.2	£0.3	£3.3	£1.5	£0.0	£57.0
Bexhill-on-Sea: Ravenside Retail Park	£29.4	£41.7	£0.8	£13.2	£5.7	£5.8	£40.7	£21.3	£0.1	£169.0
Eastbourne	£9.2	£22.8	£3.5	£1.6	£1.4	£1.2	£12.0	£5.3	£0.0	£61.0
Royal Tunbridge Wells	£0.2	£0.5	£19.8	£7.1	£2.2	£0.7	£2.5	£1.1	£0.0	£27.3
Hawkhurst	£0.0	£0.0	£1.6	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6
Heathfield	£0.0	£0.0	£3.8	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0
All Other Centres / Stores	£1.2	£5.8	£9.7	£11.0	£22.0	£2.2	£10.3	£5.3	£9.1	£68.3
Sub-Total	£57.5	£97.8	£39.4	£35.3	£44.3	£10.8	£70.3	£34.6	£22.1	£411.7
TOTAL	£65.2	£116.9	£42.2	£60.1	£69.4	£29.6	£202.1	£95.7	£22.1	£703.5

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 6: 2040 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£4.7	£11.5	£0.8	£11.0	£17.6	£10.4	£92.2	£26.1	£0.1	£177.3
DISTRICT CENTRE: ST LEONARDS	£0.2	£0.7	£0.0	£1.5	£0.9	£1.5	£7.8	£13.9	£0.0	£26.3
DISTRICT CENTRE: SILVERHILL	£0.2	£0.7	£0.3	£1.1	£1.8	£0.8	£7.2	£1.8	£0.0	£14.0
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.3	£1.0	£1.6	£0.0	£0.0	£2.9
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.3	£0.0	£1.4
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.2	£1.1	£0.2	£1.1	£0.0	£0.0	£2.5
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£1.4	£4.6	£0.2	£0.6	£0.7	£0.8	£4.8	£1.7	£0.0	£15.8
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£1.9	£1.1	£1.0	£4.9	£2.6	£2.3	£7.0	£10.2	£0.0	£29.6
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.8	£0.7	£0.0	£3.0
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.6	£0.4	£2.8	£2.6	£2.2	£7.6	£1.8	£0.0	£17.4
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Tesco Extra, Church Wood Drive	£0.4	£2.8	£0.5	£5.5	£1.3	£2.0	£16.4	£12.0	£0.0	£40.7
All Other Out-of-Centre Shops / Stores	£0.2	£0.1	£0.1	£1.4	£0.0	£0.3	£2.5	£1.6	£0.0	£6.2
HASTINGS BOROUGH COUNCIL AREA	£8.9	£22.1	£3.4	£29.2	£29.0	£21.7	£150.9	£70.4	£0.1	£337.3
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.1	£0.6	£14.9	£0.6	£1.8	£0.1	£15.1	£28.2
Bexhill-on-Sea	£20.3	£31.0	£0.2	£1.5	£0.3	£0.4	£3.8	£1.8	£0.0	£65.9
Bexhill-on-Sea: Ravenside Retail Park	£34.1	£48.2	£1.0	£15.6	£6.6	£6.7	£46.6	£24.5	£0.1	£195.4
Eastbourne	£10.7	£26.3	£4.1	£1.9	£1.6	£1.4	£13.7	£6.1	£0.0	£70.5
Royal Tunbridge Wells	£0.2	£0.5	£23.3	£8.4	£2.5	£0.8	£2.9	£1.2	£0.0	£31.6
Hawkhurst	£0.0	£0.0	£1.8	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Heathfield	£0.0	£0.0	£4.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
All Other Centres / Stores	£1.4	£6.7	£11.4	£12.9	£25.4	£2.6	£11.8	£6.0	£10.6	£78.9
Sub-Total	£66.8	£112.9	£46.4	£41.5	£51.3	£12.4	£80.6	£39.8	£25.8	£475.9
TOTAL	£75.7	£135.0	£49.7	£70.7	£80.3	£34.1	£231.5	£110.1	£25.9	£813.2

Hastings Borough Council: Town Centre, Retail Leisure Uses Study 2024
Comparison Goods: Market Shares (Excluding SFT) (%)

TABLE 7: 2045 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
Excluding Internet Shopping and other Special Forms of Trading

HASTINGS BOROUGH COUNCIL AREA	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	STUDY AREA
TOWN CENTRE: HASTINGS	£5.6	£13.5	£0.9	£13.0	£20.6	£12.2	£106.8	£30.3	£0.1	£207.4
DISTRICT CENTRE: ST LEONARDS	£0.2	£0.8	£0.0	£1.8	£1.1	£1.7	£9.0	£16.2	£0.0	£30.8
DISTRICT CENTRE: SILVERHILL	£0.2	£0.8	£0.4	£1.3	£2.1	£0.9	£8.4	£2.1	£0.0	£16.4
DISTRICT CENTRE: OLD TOWN	£0.0	£0.0	£0.0	£0.0	£0.3	£1.1	£1.8	£0.0	£0.0	£3.4
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.4	£0.0	£1.7
OUT-OF-TOWN CENTRE STORES / LOCATIONS										
Aldi, Bexhill Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Aldi, Rye Road	£0.0	£0.0	£0.0	£0.2	£1.3	£0.2	£1.2	£0.0	£0.0	£3.0
Bexhill Road Retail Park [TK Maxx, Carpetright and Bensons for Beds]	£1.7	£5.4	£0.2	£0.8	£0.9	£0.9	£5.6	£1.9	£0.0	£18.5
Blackbrooks Garden Centre, Bexhill Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Hastings Retail Park, Seddlescombe Road North [Dunelm, Pets@Home]	£2.2	£1.3	£1.2	£5.8	£3.1	£2.7	£8.1	£11.8	£0.0	£34.7
Lidl, Bohemia Road, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£2.1	£0.8	£0.0	£3.5
Sainsbury's Superstore, John Macadam Way, St Leonards-on-Sea	£0.0	£0.7	£0.5	£3.3	£3.1	£2.5	£8.8	£2.1	£0.0	£20.4
Tesco Express, Fernside Avenue, St Leonards-on-Sea	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2
Tesco Extra, Church Wood Drive	£0.5	£3.3	£0.6	£6.6	£1.5	£2.4	£19.0	£14.0	£0.0	£47.6
All Other Out-of-Centre Shops / Stores	£0.2	£0.1	£0.1	£1.7	£0.0	£0.4	£2.9	£1.9	£0.0	£7.2
HASTINGS BOROUGH COUNCIL AREA	£10.5	£25.9	£4.0	£34.7	£34.1	£25.4	£174.7	£81.8	£0.1	£394.7
OTHER CENTRES/STORES OUTSIDE HASTINGS BOROUGH COUNCIL AREA										
Ashford	£0.0	£0.1	£0.2	£0.7	£17.5	£0.7	£2.0	£0.1	£17.9	£33.0
Bexhill-on-Sea	£23.9	£36.3	£0.2	£1.8	£0.3	£0.4	£4.4	£2.1	£0.0	£77.1
Bexhill-on-Sea: Ravenside Retail Park	£40.1	£56.5	£1.2	£18.5	£7.8	£7.9	£54.0	£28.5	£0.1	£228.6
Eastbourne	£12.6	£30.8	£4.9	£2.3	£1.9	£1.6	£15.9	£7.1	£0.0	£82.5
Royal Tunbridge Wells	£0.3	£0.6	£27.8	£9.9	£3.0	£1.0	£3.3	£1.4	£0.0	£37.0
Hawkhurst	£0.0	£0.0	£2.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Heathfield	£0.0	£0.0	£5.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£4.0
All Other Centres / Stores	£1.6	£7.9	£13.6	£15.4	£29.8	£3.0	£13.6	£7.0	£12.6	£92.4
Sub-Total	£78.5	£132.4	£55.2	£49.4	£60.2	£14.5	£93.2	£46.2	£30.6	£556.8
TOTAL	£89.0	£158.3	£59.3	£84.1	£94.3	£40.0	£267.9	£128.0	£30.6	£951.5

Appendix 9: Comparison Goods Capacity

TABLE 1: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)
Excluding SFT & 'Inflow' from outside Study Area

	2024	2025	2030	2035	2040	2045
HASTINGS BOROUGH COUNCIL AREA						
Town Centre: Hastings	£115.6	£117.0	£134.0	£153.3	£177.3	£207.4
District Centre: St Leonards	£17.1	£17.4	£19.9	£22.7	£26.3	£30.8
District Centre: Silverhill	£9.1	£9.2	£10.6	£12.1	£14.0	£16.4
District Centre: Old Town	£1.9	£1.9	£2.2	£2.5	£2.9	£3.4
All Local Centres / All Other Shops	£0.9	£0.9	£1.1	£1.2	£1.4	£1.7
All Out-of-Centre Locations	£75.3	£76.2	£87.3	£99.9	£115.5	£135.1
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN THE HASTINGS BOROUGH COUNCIL AREA	£220.0	£222.7	£255.0	£291.8	£337.3	£394.7

TABLE 2: ALL COMPARISON GOODS - TOTAL TURNOVER
Including 'Inflow' from outside Study Area

		2024	2025	2030	2035	2040	2045
HASTINGS BOROUGH COUNCIL AREA							
Town Centre: Hastings	5.0%	£121.4	£122.9	£140.7	£161.0	£186.1	£217.8
District Centre: St Leonards	3.0%	£17.7	£17.9	£20.5	£23.4	£27.1	£31.7
District Centre: Silverhill	1.0%	£9.2	£9.3	£10.7	£12.2	£14.2	£16.6
District Centre: Old Town	2.0%	£1.9	£1.9	£2.2	£2.5	£2.9	£3.4
All Local Centres / All Other Shops	1.0%	£0.9	£0.9	£1.1	£1.2	£1.4	£1.7
All Out-of-Centre Locations	3.0%	£77.6	£78.5	£89.9	£102.9	£119.0	£139.2
TOTAL STUDY AREA - EXPENDITURE ALLOCATED TO STORES IN THE HASTINGS BOROUGH COUNCIL AREA		£228.7	£231.5	£265.1	£303.3	£350.7	£410.3

TABLE 3: COMMITTED COMPARISON GOODS FLOORSPACE

CENTRE	PLANNING REF	LOCATION	Gross Floorspace (sq m)	Net Floorspace (sq m)	2024 Average Sales Density (£ per sqm)	FORECAST TURNOVER (£M)					
						2024	2025	2030	2035	2040	2045
1 Hastings-Town Centre	HS/FA/20/00320	Former Observer building, 53 Cambridge Road, TN34 1HZ.	590	249	4,000	-	-	£1.2	£1.3	£1.5	£1.8
2 St Leonards: Out-of-Centre	HS/FA/21/00003	Ashdown House, Sedlescombe Road North, St Leonards-on-sea, TN37 7PB.	1,918	268	4,000	-	-	£1.2	£1.4	£1.6	£1.9
3 St Leonards: Out-of-Centre	HS/FA/19/00571	Congregational Church, London Road, St Leonards-on-Sea.	943	495	4,000	-	-	£2.3	£2.6	£3.0	£3.5
HASTINGS BOROUGH COUNCIL AREA TOTAL						-	-	£4.7	£5.4	£6.2	£7.1

Notes

- HS/FA/20/00320 - Proposed change of use, two-storey replacement roof extension and full refurbishment of existing building. To provide a mixed-use redevelopment comprising retail (Class A1,A3,A4), office space (Class B1) a microbrewery (Class B2), 15 residential units (Class C3), event and gym space (Class D2) and ancillary shared and management accommodation, with associated access, external alterations, landscaping, plant, cycle storage and other associated works. Council figures and accompanying Design & Access Statement provides up to 332.4sqm net for former A1 and A3 uses. It is assumed that 75% of this space (i.e. 249 sqm net) is for retail and for comparison goods only.
- HS/FA/21/00003 - Erection of a total of 151 no. dwellings (C3) and a 188 sqm community centre (Use Class F2(b)) accessed from Harrow Lane, together with a 1,918 sqm food retail store (Use Class E(a)) accessed from Sedlescombe Road North, and associated car parking, landscaping and servicing areas following demolition of the existing buildings (amended description). Aldi application, as per planning and retail statement Gross Area of 1,918sqm; netted down to a net sales area of 1,343sqm net (using a gross to net ratio of 70%) of which 1,075 sqm net (80%) is for convenience goods and 268 sqm net (20%) is for comparison goods.
- HS/FA/19/00571 - Change of use to retail outlets (A1) and cafe (A3). Council figures provide a floorspace of some 943 sqm gross. This has been netted down to 660sqm net using a gross to net ratio of 70%. Of this floorspace it is assumed that 75% (495sqm net) is for comparison goods retail and the remainder for other E class uses e.g. cafe.

TABLE 4: HASTINGS BOROUGH COUNCIL AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£228.7	£231.5	£265.1	£303.3	£350.7	£410.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£228.7	£232.1	£266.5	£305.9	£351.2	£403.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£-1.4	£-2.6	£-0.6	£7.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£4.7	£5.4	£6.2	£7.1
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£-6.1	£-8.0	£-6.8	£-0.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-871	-998	-739	9
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-1,244	-1,426	-1,055	-12

Notes:

- STEP 1:
STEP 2:
- The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 2). It has been assumed for the purpose of this assessment that the LPA's Comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 21 (February 2024) and other research evidence.
- STEP 3:
STEP 4:
- The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage. The turnover of all known commitments has been derived from Table 3. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by **2030**.
- STEP 5:
STEP 6:
- The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4). The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: TOWN CENTRE: HASTINGS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£121.4	£122.9	£140.7	£161.0	£186.1	£217.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£121.4	£123.2	£141.4	£162.4	£186.4	£214.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£-0.7	£-1.4	£-0.3	£3.7
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£1.2	£1.3	£1.5	£1.8
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£-1.9	£-2.7	£-1.8	£2.0
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-270	-338	-200	188
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-386	-482	-286	268

TABLE 6: DISTRICT CENTRE: ST LEONARDS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£17.7	£17.9	£20.5	£23.4	£27.1	£31.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£17.7	£17.9	£20.6	£23.6	£27.1	£31.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£-0.1	£-0.2	£0.0	£0.5
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£-0.1	£-0.2	£0.0	£0.5
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-15	-25	-5	51
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-22	-36	-7	74

TABLE 7: DISTRICT CENTRE: SILVERHILL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£9.2	£9.3	£10.7	£12.2	£14.2	£16.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£9.2	£9.4	£10.8	£12.3	£14.2	£16.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	-£0.1	-£0.1	£0.0	£0.3
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	-£0.1	-£0.1	£0.0	£0.3
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-8	-13	-3	27
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-11	-19	-4	38

TABLE 8: DISTRICT CENTRE: OLD TOWN - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£1.9	£1.9	£2.2	£2.5	£2.9	£3.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£1.9	£1.9	£2.2	£2.6	£2.9	£3.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£0.0	£0.0	£0.0	£0.1
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£0.0	£0.0	£0.0	£0.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-2	-3	-1	6
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-2	-4	-1	8

TABLE 9: ALL LOCAL CENTRES / ALL OTHER SHOPS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£0.9	£0.9	£1.1	£1.2	£1.4	£1.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£0.9	£0.9	£1.1	£1.2	£1.4	£1.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	£0.0	£0.0	£0.0	£0.0
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	£0.0	£0.0	£0.0	£0.0
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-1	-1	-0	3

TABLE 10: ALL OUT-OF-CENTRE FLOORSPACE IN THE HASTINGS BOROUGH COUNCIL AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2024	2025	2030	2035	2040	2045
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£77.6	£78.5	£89.9	£102.9	£119.0	£139.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£77.6	£78.7	£90.4	£103.8	£119.2	£136.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-	-£0.5	-£0.9	-£0.2	£2.4
STEP 4:	TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	-	-	£3.6	£4.1	£4.7	£5.4
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	-	-	-£4.0	-£5.0	-£4.9	-£3.0
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,090	£6,992	£8,027	£9,215	£10,580
	(ii) Net Floorspace Capacity (sq m):	-	-	-575	-618	-530	-283
	(iii) Assumed Net / Gross Floorspace Ratio:			70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):			-822	-883	-758	-404

SUMMARY TABLE - COMPARISON GOODS CAPACITY ASSESSMENT FOR NEW FLOORSPACE (NET SQ M)

	2030	2035	2040	2045
Town Centre: Hastings	-270	-338	-200	188
District Centre: St Leonards	-15	-25	-5	51
District Centre: Silverhill	-8	-13	-3	27
District Centre: Old Town	-2	-3	-1	6
All Local Centres / All Other Shops	-1	-1	-0	3
All Out-of-Centre Locations	-575	-618	-530	-283
GRAND TOTAL: HASTINGS BOROUGH COUNCIL AREA	-871	-998	-739	-9