

Hastings Town Centre, Retail and Leisure Uses Study

Volume 3: Centre Health Checks

Prepared for:

Hastings Borough Council

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This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

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1. Introduction

1. This appendix provides the findings of qualitative and quantitative assessments of the town and district centres located within Hastings Borough: Hastings Town Centre; Old Town District Centre; St Leonards District Centre (including Marine Court) and Silverhill District Centre. High-level health checks of the local centres within the Borough have also been provided.
2. The Health Check provides an overview of the relative health of the main centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG states the following twelve KPIs may be relevant in assessing the health of the town centres and planning for the future:
 - Diversity of uses
 - Proportion of vacant street level property
 - Commercial rents yields on non-domestic property
 - Customers' experience and behaviour
 - Retailer representation and intentions to change representation
 - Pedestrian flows
 - Accessibility
 - Perception of safety and occurrence of crime
 - State of town centre environmental quality
 - Balance between independent and multiple stores
 - Barriers to new businesses opening and existing businesses expanding
 - Extent to which there is an evening and night-time economy offer
3. The **Diversity of Uses** is informed by survey data provided by Experian Goad and surveys conducted by LSH and examines the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services (including food and drink outlets, games of chance venues (e.g., casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation), Retail Services (including health and beauty services (beauty salons, tattoo parlours etc.), post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services) and Financial & Business Services. Vacancies are also discussed separately.
4. **Pedestrian Flows** uses Footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily and MSCI Property Intel can identify footfall levels at different times of the day. The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange/ red higher concentrations.

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5. **Retailer representation** is informed by the site visit as well as the retailer requirements which are obtained from the **Requirement List** where commercial property requirements can be viewed.
 6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.
 7. For **Crime and Safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. A heatmap can also be generated to highlight where the occurrence of crimes in an area are concentrated.
 8. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.
 9. The findings of the health check assessments are set out in the following proformas.

2. Hastings Town Centre Health Check

Overview

10. Hastings town centre is the dominant centre for larger scale commercial, community, leisure and cultural development in the Borough.
11. The town is accessible via the A21 road, connecting it to London. Hastings railway station offers regular services to London, Brighton and Ashford International, facilitating easy access to the broader region.
12. Much of the town centre is within the Hastings Town Centre Conservation Area. This developed in the Priory Valley in mid-Victorian times following the arrival of the railway.
13. Hastings town centre underwent a major planned improvement and expansion during the 1990s with construction of the Priory Meadow Shopping Centre and pedestrianisation of the main shopping streets.
14. The centre's prime retail pitch is focused around Priory Meadow Shopping Centre and the pedestrianised areas of Queens Road, Robertson Street and Wellington Place. To the east and west of this prime pitch are retail and town centre uses that extend along Queens Road and Cambridge Road.

Figure 1: The Seadog Pub, Hastings



Source: LSH Site Visit

15. In terms of commercial leisure provision, there are a diverse range of cafés, restaurants, pubs, bars and takeaways across the centre. This provision is supplemented by other leisure uses, including the Odeon Cinema, Queens Road.
16. Hastings town centre boundary also includes the White Rock Theatre and St Mary in the Castle (closed at present). More widely, Hastings hosts events such as the Hastings International Piano Concerto Competition.
17. Recent and ongoing regeneration projects aim to rejuvenate the town centre, improve infrastructure, enhance public amenities and place focus on sustainable development and economic growth.

Figure 2: Hastings Town Centre Map and Draft Local Plan Boundary



Source: Hastings Borough Council

Diversity of Uses

18. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Hastings town centre.

19. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 3: Hastings Town Centre Diversity of Uses

Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	357	70.3%
F1 & F2	Local Community (incl. local shops) and Learning	15	3.0%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	56	11.0%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	1	0.2%
Vacant		79	15.6%
Total		508	100.0%

Source: Hastings Borough Council

20. Of the 508 units, 357 (70.3%) of these are E class use, which includes shops, cafes & restaurants, banks and medical & health services.
21. Food stores of varying sizes can be found across the centre. A large format Morrisons store is located to the north east of the centre. The store has a large, dedicated car park, a petrol station, café and pharmacy. More centrally within the town, there is a Tesco Express (Havelock Road) and a Sainsbury's Local (Devonshire Road) along with a variety of smaller scale operators.
22. Hastings has a strong presence of national multiple clothing and accessory brands, largely located within Priory Meadow Shopping Centre or nearby (such as JD Sports, Primark, H&M and M&S), with Sports Direct and Millets also found along Wellington Place.
23. There is a strong provision of banks within the town centre. Those open and operating at the time of the survey are Nationwide, Lloyds, Halifax, Barclays, Santander, NatWest and HSBC.
24. The 56 Sui-Generis operators include the Odeon Cinema which has 4 screens and can be found at the Queens Road/ Albert Road junction.
25. 21 drinking establishments are present, many of them pubs. Takeaways also make up a significant proportion of the Sui-Generis provision within the centre (15 outlets).
26. 79 units were found to be vacant, which represents 15.6% of units analysed for the purposes of this study. Experian Goad's 2024 UK average is 14.1%.
27. Vacant units include the former Peacocks unit (30-36 Queens Road), the former Argos unit (20-23 Castle Street) and the former H. Samuel unit within Priory Meadow Shopping Centre.

Figure 4: Vacant Unit Along Queens Road



Source: LSH Site Visit

28. To give additional colour to the mix of uses within the town centre, Experian Goad data from their latest survey (15/11/2023) has been analysed to show the provision of uses based on Goad's retail and leisure categories.
29. To note that Goad's coverage of Hastings town centre will not perfectly match up to the town centre boundary. The figure below shows the area analysed.

Figure 5: Hastings Town Centre, Goad Map Area



Source: Experian Goad

- 30. The table below shows that there are a total of 425 outlets, with comparison retail accounting for the most outlets (115) and floorspace (27,880sqm).
- 31. The mix of outlets are broadly in line with the UK average.
- 32. There is a much higher proportional provision of comparison floorspace within the area when compared to the UK average, and a much lower proportional provision of leisure services floorspace.

Figure 6: Hastings Town Centre, Goad Diversity of Uses

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Hastings	UK Average		Hastings	UK Average
Comparison Retail	115	27.1%	26.4%	27,880	38.2%	29.4%
Convenience Retail	45	10.6%	9.3%	10,440	14.3%	15.6%
Retail Services	53	12.5%	15.9%	4,690	6.4%	7.3%
Leisure Services	102	24.0%	25.8%	15,210	20.9%	26.7%
Financial & Business Services	44	10.4%	8.3%	5,340	7.3%	6.3%
Vacant	66	15.5%	14.1%	9,360	12.8%	14.2%
Total	425	100.0%	100.0%	72,920	100.0%	100.0%

Source: Experian Goad

33. The table below shows that there are a total of 84 food and beverage units, with cafes accounting for the most units and floorspace (24 units and 2,640sqm).
34. The mix of units and floorspace are both broadly in line with the UK averages.

Figure 7: Hastings Town Centre, Goad Food & Beverage Uses

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Hastings	UK Average		Hastings	UK Average
Bars & Wine Bars	10	2.4%	2.3%	1,710	2.3%	2.4%
Cafes	24	5.6%	5.1%	2,640	3.6%	2.9%
Fast Food & Take-Away	21	4.9%	6.1%	1,790	2.5%	3.1%
Public Houses	10	2.4%	2.6%	1,710	2.3%	3.4%
Restaurants	19	4.5%	5.0%	2,320	3.2%	4.2%
Total	84	19.8%	21.1%	10,170	13.9%	16.0%

Source: Experian Goad

Multiple and Independent Representation

35. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Hastings town centre has a range of national multiples including Primark, Boots and M&S.
36. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Hastings town centre has a range of independent outlets, including Waterfalls (gift shop and coffee house), Beak & Tail (butchers) and The Seadog (pub).

Figure 8: Waterfalls (Gift Shop and Coffee House)



Source: LSH Site Visit

Street Markets

37. Hastings Town Centre Market is held every Thursday between 9am and 3pm, as well as every 2nd and 4th Saturday of the month. Located in the heart of the shopping area, around 15 stalls offer a range of goods from fresh produce and flowers to clothes and books.

Retailer Requirements

38. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out below.

Figure 9: Hastings Town Centre Retailer Requirements

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
24/06/2024	Cakebox	Convenience Retail	70	110
28/05/2024	Matalan	Comparison Retail	1,400	2,300
13/05/2024	Clip 'n Climb	Leisure Service	460	460
30/04/2024	Taco Bell	Leisure Service	170	230
29/04/2024	PDSA (Pet Charity Shop)	Comparison Retail	90	190
16/04/2024	Chopstix	Leisure Service	50	230
08/04/2024	Lidl	Convenience Retail	1,650	2,400
25/03/2024	The Range	Comparison Retail	1,850	7,450
26/02/2024	Shoezone	Comparison Retail	190	370
22/01/2024	Age UK	Comparison Retail	130	460
26/09/2023	Toolstation	Comparison Retail	350	560
04/09/2024	Sense (Charity Store)	Comparison Retail	110	560
04/09/2024	Menkind	Comparison Retail	140	370
22/08/2024	Cotton Traders	Comparison Retail	90	170
02/05/2023	KFC	Leisure Service	110	230
Total			6,860	16,090

Source: The Requirement List

39. As of June 2024, a review of published operator requirements identified 15 recorded requirements from retail and leisure operators since May 2023, seeking a combined maximum floorspace of up to 16,090 sqm.
40. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.
41. It is also possible that these operators are not looking for opportunities in Hastings specifically, rather they are looking for opportunities in areas similar to and including Hastings.
42. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

Commercial Rents and Yields

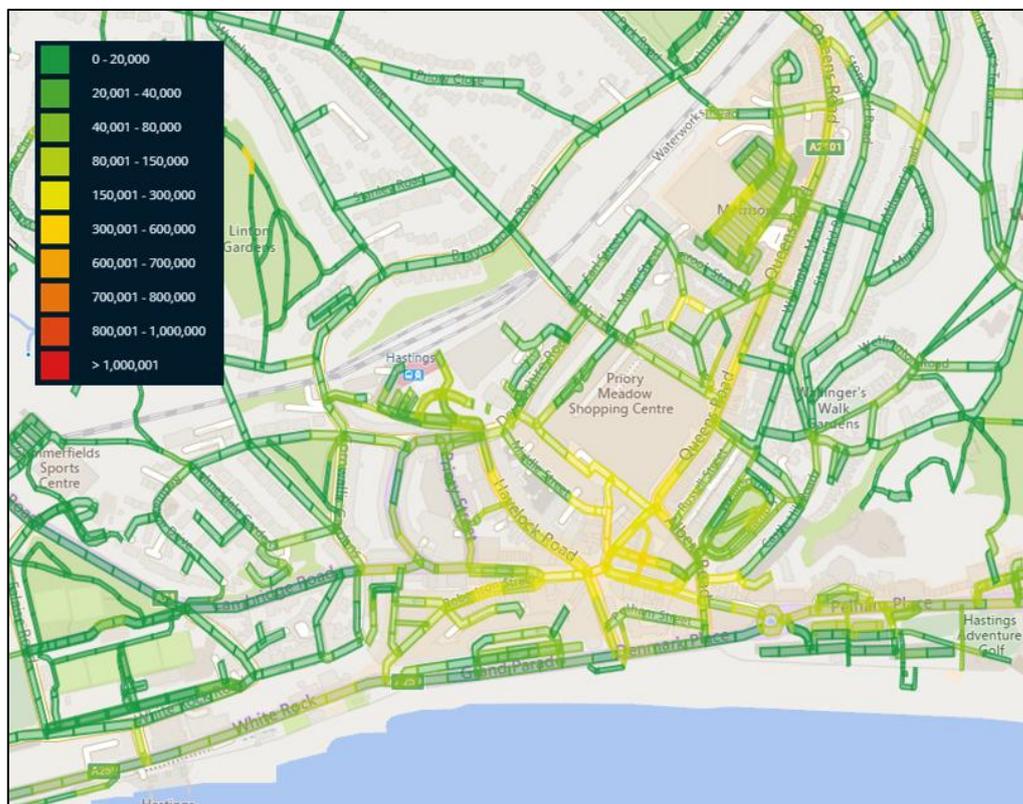
43. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
44. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

45. The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
46. A broad estimate of prime Zone A rental tone within Hastings would indicate a rental level in the region of £430/sqm (£40/sqft) – £480/sqm (£45/sqft).
47. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
 - Prime high street yields – 6.75%
 - Good secondary high street yields – 9%
 - Secondary high street yields – 12%

Pedestrian Flows

48. The figure below illustrates the pedestrian heat map for Hastings town centre as of May 2024 and shows a particular concentration of footfall in the centre of the town – Roberston Street, Wellington Place, Station Road, the southern end of Havelock Road and the western end of Queens Road.

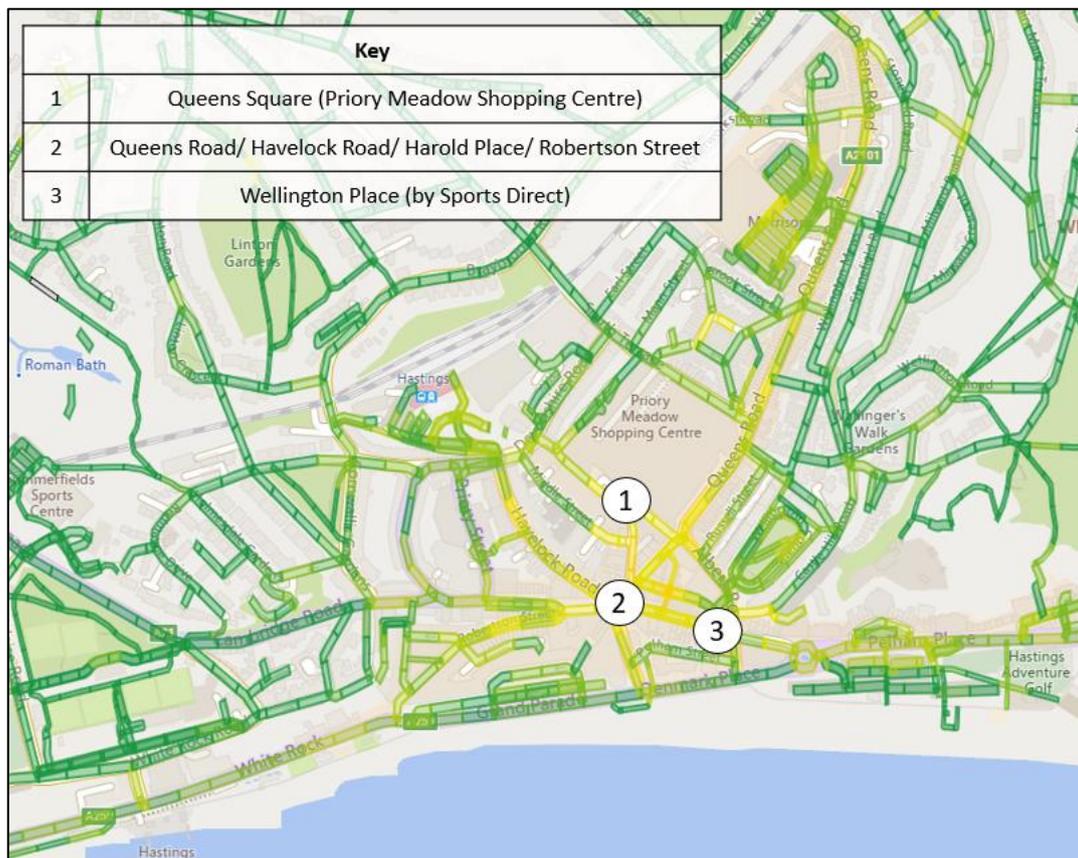
Figure 10: Hastings Town Centre Footfall Heat Map



Source: MSCl

49. Three locations within the centre have been sampled to assess footfall trends over recent years: Queens Square (Priory Meadow Shopping Centre), Queens Road/ Havelock Road/ Harold Place/ Robertson Street and Wellington Place (by Sports Direct). These locations can be seen mapped in the figure below.

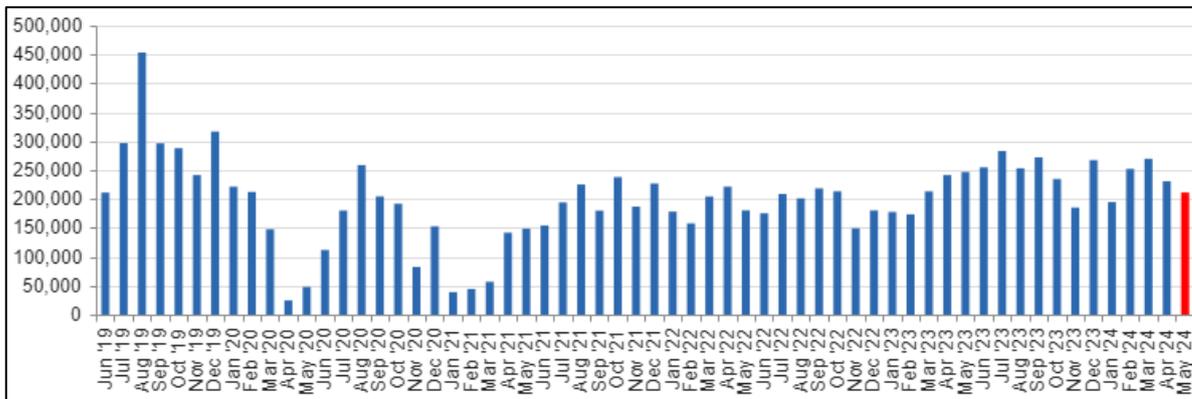
Figure 11: Hastings Town Centre Footfall Sample Locations



Source: MSCI

50. The figure below shows how footfall levels have changed between June 2019 and May 2024 at Queens Square.
51. As can be seen, footfall levels have bounced back following the period of the pandemic. Figures in the summer of 2023 were promising, with July 2023 representing the highest monthly figure (283,000) since December 2019 (317,000).

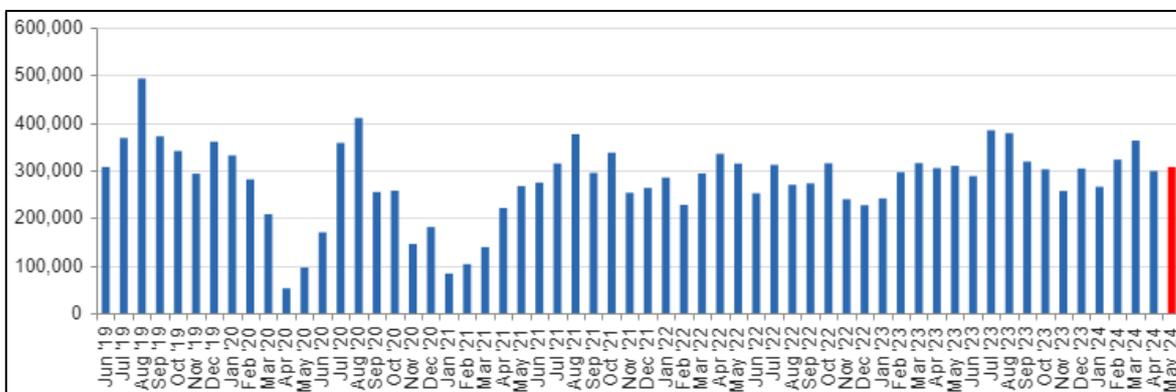
Figure 12: Monthly Footfall Graph, June 2019 - May 2024, Queens Square (Priory Meadow Shopping Centre)



Source: MSCI

- 52. The figure below shows how footfall levels have changed between June 2019 and May 2024 at the Queens Road/ Havelock Road/ Harold Place/ Robertson Street junction.
- 53. As can be seen, footfall levels have recovered well post-COVID. With the exclusion of August 2019 (493,000) and the pandemic period, monthly figures have consistently been close to or above 300,000.

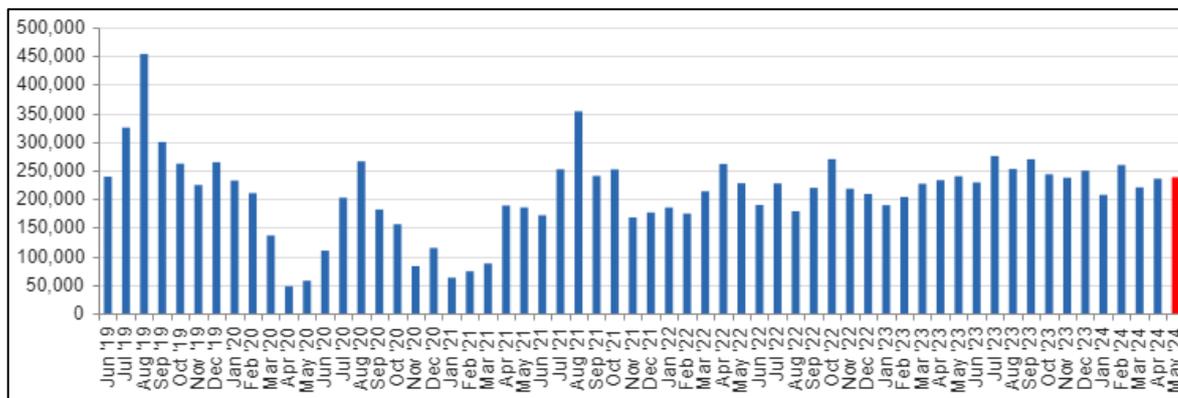
Figure 13: Monthly Footfall Graph, June 2019 - May 2024, Queens Road/ Havelock Road/ Harold Place/ Robertson Street



Source: MSCI

- 54. The figure below shows how footfall levels have changed between June 2019 and May 2024 at Wellington Place (by Sports Direct).
- 55. As can be seen, footfall levels have shown positive signs since the pandemic period. Following significant drops in April 2020 and again in November 2020, monthly figures have climbed back up and remained stable.

Figure 14: Monthly Footfall Graph, June 2019 - May 2024, Wellington Place (by Sports Direct)



Source: MSCI

56. In all three locations, August represented the record footfall month in 2019 (from June onwards), 2020 and 2021 (with the exception of Queens Square (Priory Meadow Shopping Centre) in 2021), however, that has not been the case in 2022 or 2023.

Accessibility

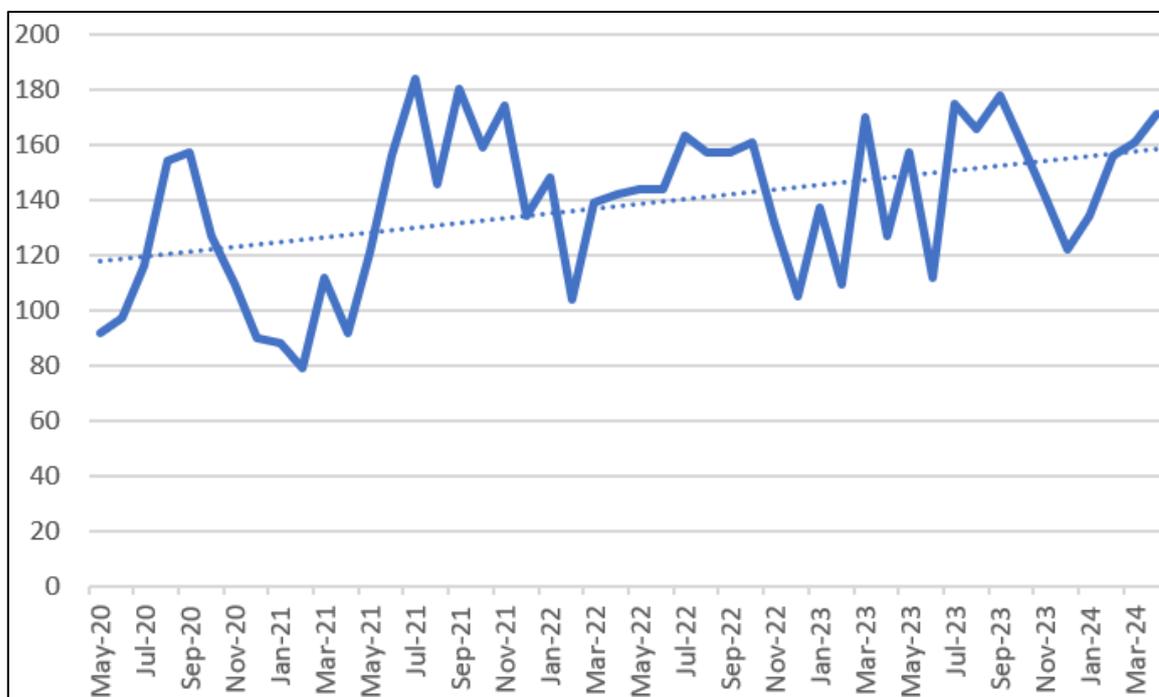
57. The town's transport hub can be found to the north of the centre, where Priory Street, Havelock Road and Middle Street join Cornwallis Terrace. Train services run frequently, heading east towards Ore, Rye and Ashford and west towards St Leonards (Warrior Square), Bexhill and Eastbourne. Direct services to London take less than 2 hours, whilst Brighton can be reached in 1 hour 15 minutes. Bus services can be picked up, connecting to places both within the Borough (such as Old Town, Silverhill and St Leonards) and outside of the Borough (including Eastbourne and Rye).
58. Hastings town centre is well-connected by road, with the A259 running through the southern edge of the centre, along the south coast, connecting to Ore, Rye and beyond to the east and St Leonards and Eastbourne to the west. The A21 provides a north-south route with connections in the direction of Royal Tunbridge Wells, Tonbridge and Seven Oaks.
59. Car parking can be found across the centre. The largest four car parks are Priory Meadow (961 spaces), Priory Street (266 spaces), Pelham Place (229 spaces) and Carlisle Parade Underground (171 spaces). Pier Underground, Carlisle Hill, Cornwallis Street, Hastings Station and Podium also combine to provide an additional 300+ spaces.
60. Whilst there is a cycle path along the sea front, there is little to no provision of dedicated cycle lanes within the heart of the town centre. Bike racks are strategically located at the train station, allowing for longer-distance connections to be made by bus or train.
61. Parts of the town centre are pedestrian friendly, with limited vehicular access, such as Robertson Street and Wellington Place, allowing for a safer and more relaxing

shopping experience in the core retail areas. The linkage between the town centre and seafront is notably challenging in parts, with a lack of pedestrian crossings in key locations along the A259. Whilst the subway at the southern end of Harold Place provides a safe and direct pedestrian connection to the sea front, there is a lack of signage within the subway itself.

Crime and Safety

- 62. A central postcode within Hastings town centre was used to review total crime data within a ¼ mile radius between May 2020 and April 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 63. As can be seen, recorded crime levels have steadily risen in recent years.

Figure 15: Recorded Crimes, Hastings Town Centre, May 2020 - April 2024



Source: UKCrimeStats

Environmental Quality

- 64. There is a lack of greenery and vibrancy within the centre and a limited provision of green, open space to be enjoyed.
- 65. Buildings such as Queensbury House (Cornwallis Terrace), Poundstretcher (Albert Road) and Sports Direct (Wellington Place) stand out as buildings of low quality, which detract from the centre. Hastings Register Office (Listed former Town Hall), Priory Meadow and the former University of Brighton building (Cambridge Road) however, are examples of a mixture of buildings and architectural styles, that all contribute positively to the town.

Figure 16: Queensbury House, Hastings



Source: LSH Site Visit

66. Bins are commonly found in the centre making it easier for visitors to dispose of their waste which consequently reduces the likelihood of litter in the area. Bollards and railings line the pavements in areas of high traffic congestion to improve the safety of pedestrians. Seating is available in key locations around the centre, such as Robertson Street and Queens Square (Priory Meadow Shopping Centre), which allows visitors to sit and rest whilst in the centre.

Barriers to Business

67. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
 - Brexit – adding complexities and costs to the price of goods.
 - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).

- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough’s residents and businesses.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

68. The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g., energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

Evening and Night Time Economy

69. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Hastings town centre have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

70. As outlined below, there is a range of restaurants, pubs and bars on offer across the town centre, with several establishments open until the early hours of the morning. These are all supported by the Odeon cinema, located at the Queens Road/ Albert Road junction, offering 4 screens with a capacity of 550.

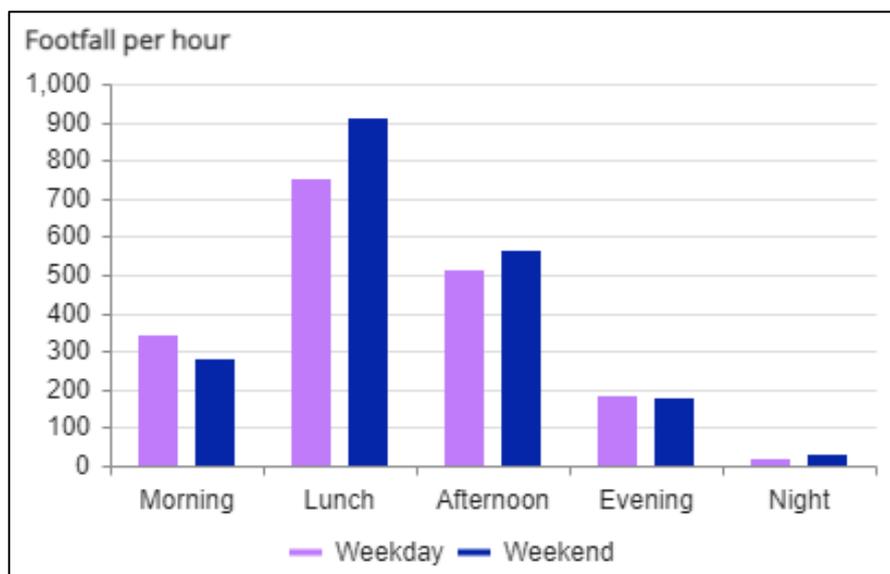
Figure 17: Leisure Operator Sample

Retailer Name	Type	Open	Close
La Cucina Hastings	Italian Restaurant	4pm	10pm
The John Logie Baird – JD Wetherspoon	Pub	8am	12-1am
The Clarence	Pub	10–11am	10-11pm
Bar Moda	Bar	12pm	11pm-1am
Pizza Express	Restaurant	11:30am	10-10:30pm
180 Sports Bar	Bar	11am-12pm	9pm-12am
The Carlisle	Pub	11am-12pm	10pm-2am
Barnaby’s Lounge	Cocktail Bar	11am	5pm-1:30am
Shish	Turkish Restaurant	12pm	10-11pm
The Seadog	Pub	12pm	11pm-12am

Retailer Name	Type	Open	Close
Tin Tins	Bar	12pm-5pm	12-3am
Odeon	Cinema	Morning	Evening

71. The figure below shows how footfall levels differ across different parts of the day (sample taken where Albert Road and Queens Road meet (by the Odeon cinema)). As can be seen, pedestrian activity drops significantly from lunch (11am – 2pm) to afternoon (2pm – 5pm) and then again from afternoon (2pm – 5pm) to evening (5pm – 9pm).

Figure 18: Time of Day Footfall



Source: MSCI

Conclusion

72. As the sole town centre within the Borough, Hastings acts as the focal point for retail, leisure and services within the area. There is a strong presence of national multiple retailers such as M&S, Sports Direct and Primark which act as a draw for visitors from beyond the immediate catchment. These retailers are supported by leisure and entertainment operators such as Odeon Cinema and White Rock Theatre.
73. Vacancy rates are above the UK average, and with rising levels of crime and a continued trend in the direction of online shopping, this is of concern and so other uses (residential, healthcare, education etc.) may need to be considered in order to support the centre in its future vitality and viability.
74. Footfall has bounced back well from the pandemic period and has now stabilised across the town centre. Pedestrian activity concerns however relate to footfall levels in the evening, as well as a shift away from the summer months providing the year's peak footfall numbers.

75. There is a lack of greenery and vibrancy across the town centre, which can be expected to be playing a limiting factor in the town's ability to maximise dwell times from visitors.
76. Hastings town centre lacks a strong identity – something that its smaller neighbouring centres (Old Town and St Leonards) possess, but something that is not unachievable due to its natural and historic features as well as its strong music culture.
77. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths

- Strong provision of typical town centre uses (retail, leisure and services)
- Good presence of national multiples across clothing, accessories and health & beauty providing a draw to the centre
- Strong number of banks open and operating
- Odeon cinema as a visitor attraction
- Pedestrianisation of key primary shopping area locations
- Footfall levels bounced back well post-pandemic and have stabilised since
- Natural and historic attractions – Hastings Castle and seafront & beach
- Transport links via train to and from London and Brighton
- Bus services that connect well to other areas within the Borough

Weaknesses

- Vacancy rate above the UK average
- Significant drop off in footfall going into the evening
- Lack of dedicated cycle lanes within the heart of the centre
- Unsatisfactory pedestrian linkage between the town centre (shopping area) and the seafront
- Rising levels of crime
- A lack of greenery across the centre
- Examples of low-quality buildings that detract from the environmental quality
- Lacking a sense of arrival at the 'gateway' to town centre (Hastings train and bus station)

Opportunities

- Operators with an interest in gaining a presence within the centre
- Improvements to the public realm (greenery, vibrancy, entertainment)
- To capitalise on the connections to larger cities (Brighton and London)
- Development of opportunity sites to strengthen the mix of uses in the centre (e.g., residential)
- Focus on improvements to safety and security
- To develop and promote an identity for the town

- Improved signage allowing for better wayfinding to points of interest (e.g., Hastings Castle) and nearby district centres (Old Town and St Leonards)/ create a circuit and publicise
- Providing for sustainable travel options such as dedicated walking or cycling routes etc
- Improve flood response through future planning of the public realm and built environment
- Promoting creative industries in the town centre
- To coordinate the outputs of the regeneration funding received from government

Threats

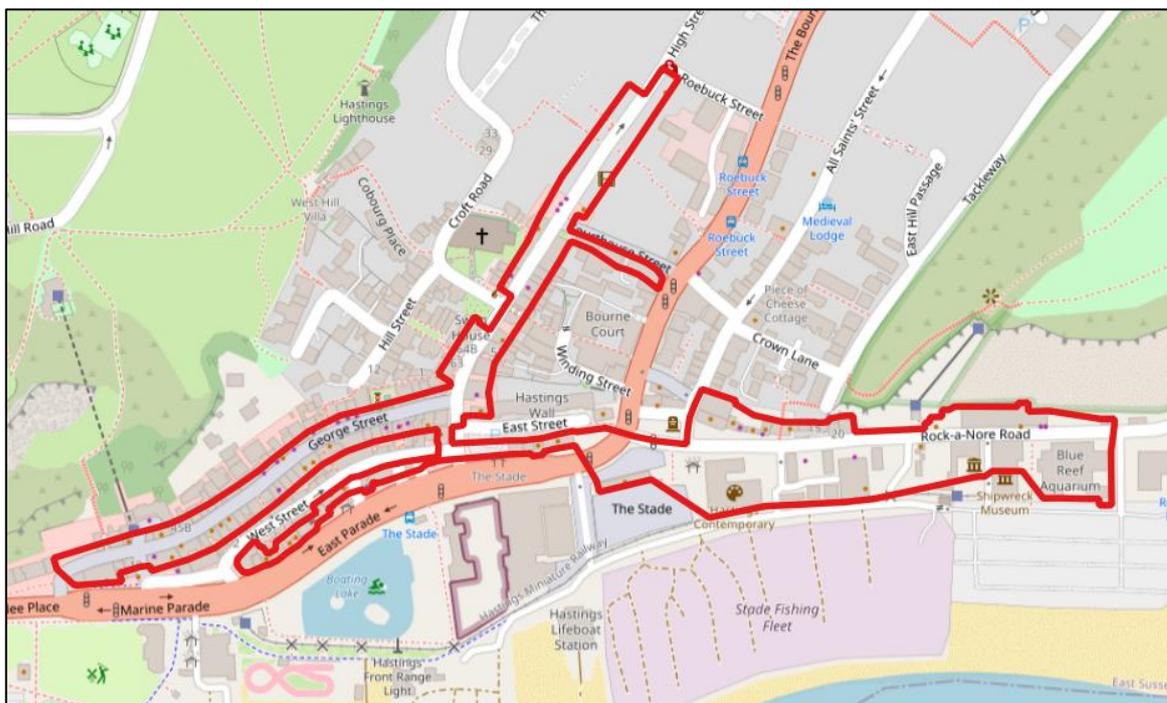
- Post-pandemic shift back to holidaymakers venturing abroad as opposed to opting for 'staycations' – August represented the peak footfall month for 2020 and 2021, but not for 2022 and 2023
- Rising crime rates deterring people from visiting the centre
- Competing retail and leisure hubs beyond the Borough (Eastbourne, Ashford (Designer Outlet) and Bexhill-on-Sea (Ravenside Retail and Leisure Park)
- High business operating costs
- The growth in online shopping and its impacts on brick-and-mortar retail outlets
- Low public perception
- Climate change and the risk of increased flooding.
- Lack of investment in the historic fabric leading to deterioration.

3. Old Town District Centre Health Check

Overview

- 78. Old Town is designated as a district centre and sits east of Hastings town centre. It provides a distinctive retail experience dominated by independent provision within a historic setting of a conservation area and listed buildings.
- 79. The eclectic mix of retail offer reflects its popularity with tourists and locals alike. The retail sector consists of independent shops, boutiques, galleries and speciality stores.
- 80. George Street provides a mix of cafes, vintage shops and independent boutiques and independent food and beverage outlets. High Street is lined with traditional shops and convenience retail outlets (bakery and delicatessen) as well as the independent cinema and arts venue, Electric Palace.
- 81. The centre also hosts events such as the annual Jack in the Green festival, and the Hastings Seafood and Wine Festival. Outside the Old Town centre boundary is the Stade Open Space which is an outdoor event area hosting food festivals, art exhibitions and community events.

Figure 19: Old Town District Centre Map and Draft Local Plan Boundary

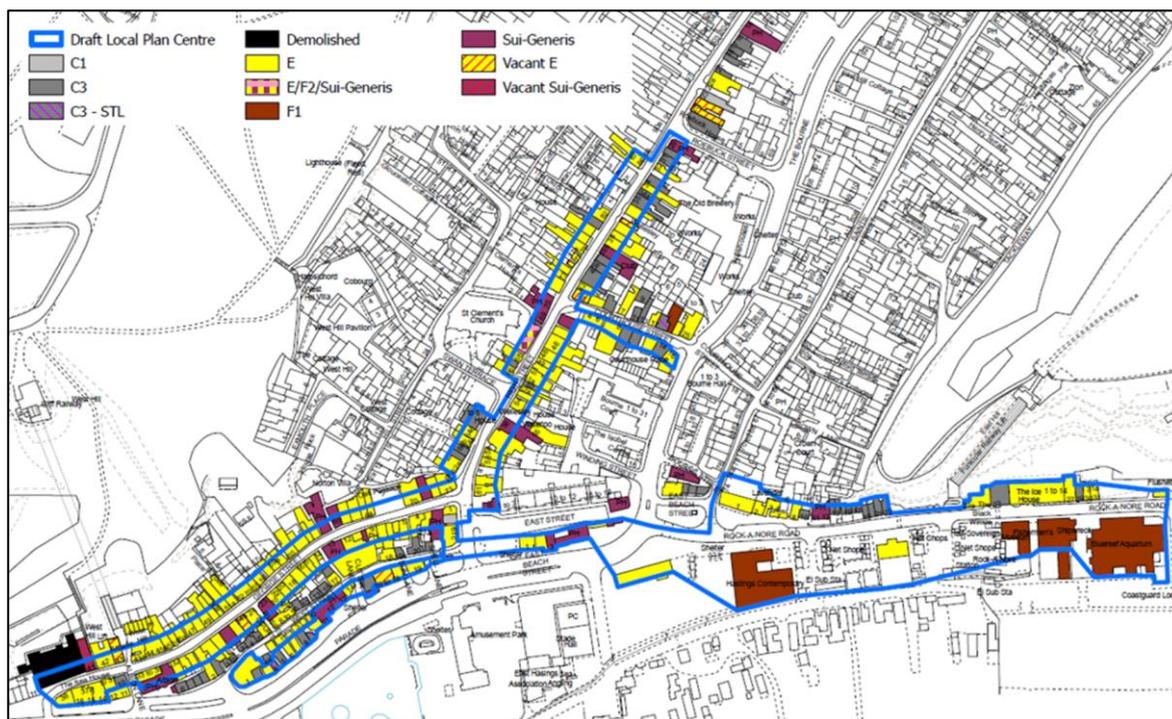


Source: Hastings Borough Council

Diversity of Uses

- 82. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Old Town district centre. The figure below is an indicative map of these uses.

Figure 20: Old Town Diversity of Uses Map



Source: Hastings Borough Council

83. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 21: Old Town District Centre Diversity of Uses

Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	127	78.4%
F1 & F2	Local Community (incl. local shops) and Learning	4	2.5%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	23	14.2%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	1	0.6%
Vacant		7	4.3%
Total		162	100.0%

Source: Hastings Borough Council

84. Of the 162 units, 127 (78.4%) of these are E class use, which includes shops, cafes & restaurants, bakeries, hairdressers and estate agents.
85. A few small format convenience food stores can be found within the centre, including Premier located along George Street and Select Convenience found 125m east of Premier along High Street. Penbuckles Delicatessen is also located along High Street.

86. Non-food shops play a key role in Old Town’s offer, with a combined total of 20 second hand or antique/interiors outlets.
87. Gift shops, sweet/ confectionery shops (Old Town Sweets and Roly’s Fudge Pantry) and ice cream parlours (Munchies) all help to meet the typical demands of visitors to a seaside resort.
88. The 23 Sui-Generis operators are predominantly drinking establishments (14) and takeaways (5), but also includes Electric Palace Cinema along High Street.
89. 7 units were found to be vacant, which represents 4.3% of units analysed for the purposes of this study. Experian Goad’s 2024 UK average is 14.1%.

Multiple and Independent Representation

90. Old Town is an independent-led centre. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby, and in the case of Old Town, attract visitors and tourists from far and wide. Old Town has a wide range of independent outlets, including Little Treasures (vintage homeware and reworked furniture), The Goose Finds (vintage clothing shop) and Old Town Sweets (sweet shop).

Figure 22: Little Treasures, Old Town



Source: LSH Site Visit

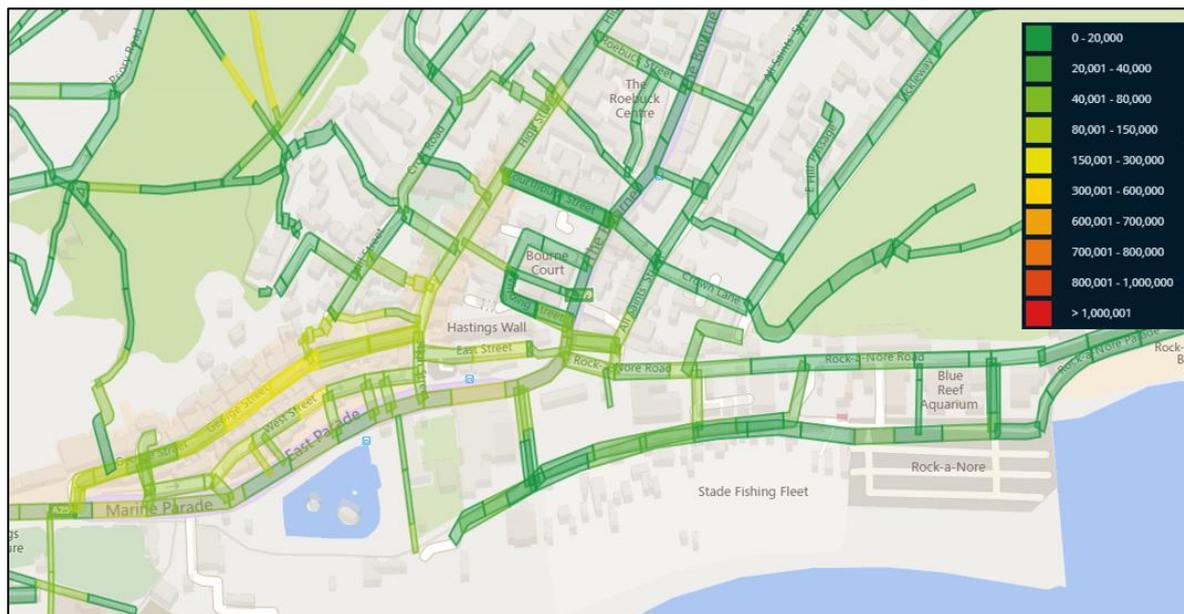
Commercial Rents and Yields

91. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
92. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.
93. The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
94. A broad estimate of prime Zone A rental tone within Old Town would indicate a rental level in the region of £270/sqm (£25/sqft) – £320/sqm (£30/sqft).
95. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
 - Prime high street yields – 6.75%
 - Good secondary high street yields – 9%
 - Secondary high street yields – 12%

Pedestrian Flows

96. The figure below illustrates the pedestrian heat map for Old Town district centre as of May 2024 and shows a particular concentration of footfall along George Street.

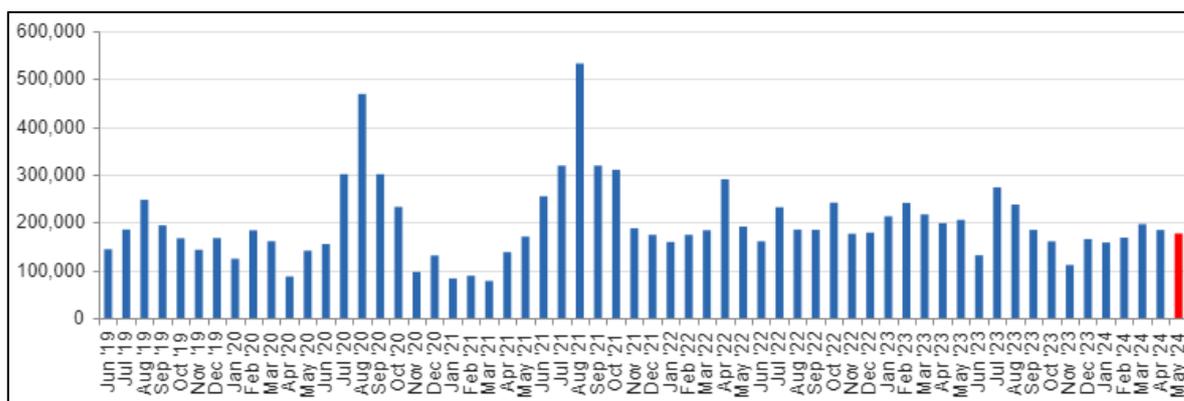
Figure 23: Old Town District Centre Footfall Heat Map



Source: MSCI

97. A central location along George Street was sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
98. As can be seen in the figure below, the summers of 2020 and 2021 saw particularly high levels of footfall (469,000 in August 2020 and 532,000 in August 2021), likely due to restrictions on international travel as a result of the pandemic, and the subsequent spike in demand for staycations. George Street has been unable to retain these footfall numbers in recent years however, with numbers returning closer to levels seen in 2019 (pre-pandemic).

Figure 24: Monthly Footfall Graph, George Street, June 2019 - May 2024



Source: MSCI

Accessibility

99. The nearest train station to Old Town is in Hastings town centre. It is less than 1km to the west and provides connections to Eastbourne, Ashford, London and more.

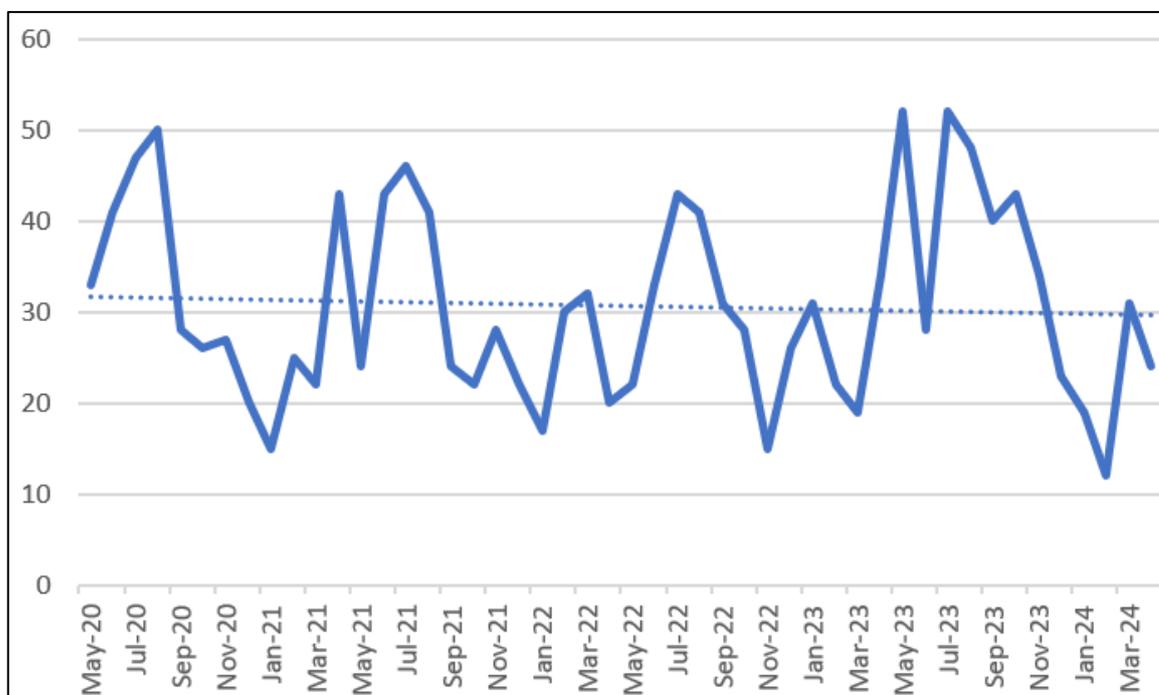
Bus routes pass through the centre along the A259 and can be picked up to reach Hastings town centre, St Leonards, Silverhill and Rye.

- 100. The A259 runs through the centre, leading east in the direction of Rye and west through Hastings town centre, St Leonards and beyond. There is limited parking within the district centre itself, although The Bourne car park (31 spaces) and Rock a Nore car park (450 spaces) offer nearby options that are within walking distance.
- 101. George Street offers a safe, pedestrian friendly experience, although with shops, cafes and bars spilling out into the street, the area can become congested on busier days. The pavements along High Street are narrow throughout, which in peak times can lead to pedestrians having to step into the road.

Crime and Safety

- 102. A central postcode within Old Town was used to review total crime data within a ¼ mile radius between May 2020 and April 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 103. As can be seen, recorded crime levels have fluctuated in line with the seasons in recent years, with summer time seeing spikes in recorded criminal activity. The trend line shows that the level of crime overall has been stable during this period.

Figure 25: Recorded Crimes, Old Town, May 2020 - April 2024



Source: UKCrimeStats

Environmental Quality

104. With its narrow streets and pedestrian cut throughs (locally termed as ‘twitterns’), small and largely well-kept buildings and distinct seaside theme, Old Town has a charming character and is an enjoyable place to spend time.
105. Butler’s Gap along George Street provides a space for people to sit, relax and enjoy within the centre, surrounded by greenery. Further seating and greenery can also be found at Old Town Maritime Gardens along High Street.
106. Lamppost style signage can be found strategically located within the centre to support visitors with wayfinding and navigation.

Figure 26: Signage, Old Town



Source: LSH Site Visit

Barriers to Business

107. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
 - Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
 - Brexit – adding complexities and costs to the price of goods.

- Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough’s residents and businesses.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

108. The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g., energy prices), labour shortages, and the squeeze on household income from the cost-of-living crisis which combined are impacting on business viability and growth potential.

Evening and Night Time Economy

109. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Old Town have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

110. As outlined below, there is a strong range of food and beverage operators, particularly when considering the size of the centre. There is a notable array of traditional pub venues within the centre that stay open late into the evening.

Figure 27: Webbe's Rock-a-Nore, Old Town



Source: LSH Site Visit

111. In addition, there is also the one-screen cinema Electric Palace along High Street, which has a capacity of 48 and showcases a range of alternative films and holds film-related events.

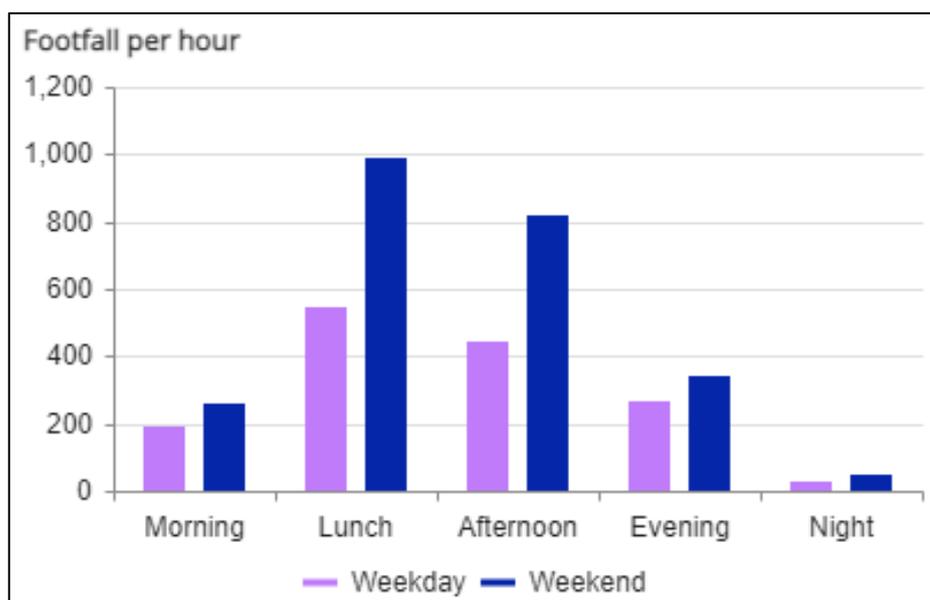
Figure 28: Leisure Operator Sample

Retailer Name	Type	Open	Close
Albion Hastings	Pub	12pm	10pm-12am
Monellis	Pizza Restaurant	12:30pm	9pm
Whistle Trago	Bar	12pm	12am
The Old Pawn Shop	Café/Bar	12pm	11pm
Anchor Inn	Pub	12pm	12am
Ye Olde Pumphouse	Pub	11am-12pm	9pm-12am
Dragon Bar	Bar	12pm	10-11pm

Retailer Name	Type	Open	Close
Hastings Arms	Pub	12pm	8-11:30pm
Porters	Restaurants	12pm	11pm-12am
The Jolly Fisherman	Pub	2-4pm	10:30-11pm
Webbe's Rock-a-Nore	Seafood Restaurant	12pm	8:30-9:30pm
Electric Palace	Cinema	Morning	Evening

112. The figure below shows how footfall levels differ across different parts of the day (taken from the same location as used within the Pedestrian Flows section). As can be seen, footfall in an evening (5pm – 9pm) does drop off considerably from the levels seen at lunch and in the afternoon. However, the actual hourly footfall numbers are quite strong when comparing to the other main centres within the Borough.

Figure 29: Time of Day Footfall



Source: MSCI

Conclusion

113. Old Town is a charming, characterful centre that meets the day to day needs of its immediate catchment whilst also appealing to and serving tourists and visitors from further afield.
114. Whilst the spikes in footfall seen across the summers of 2020 and 2021 have not been sustained, footfall has at least returned to pre-pandemic levels (as opposed to falling below).
115. The lack of national multiples in what is a strongly independent dominated centre is not a concern for the vitality and viability of Old Town, due to both the uniqueness

and charm of Old Town's offer that is created by the independent operators, as well as its proximity to Hastings town centre (which does cater for those looking to shop at the larger format national retailers).

116. The strength of Old Town's offer and role within the Borough is epitomised by its particularly low vacancy rate, which is a key indicator that the centre is and continues to be a vital and viable one.
117. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths

- Eclectic mix of independent operators
- Regular festivals and known location for events
- Seafront location
- Low vacancy rate
- The pedestrianised area along George Street
- Strong and unique identity
- Good overall environmental quality with a charming character
- Good signage and wayfinding
- Historic character
- Linkages with maritime history
- Strong provision and range of food & beverage venues

Weaknesses

- Narrow pavements along High Street which can cause safety risks for pedestrians at busier times
- Permeability across the centre is impaired by passing traffic

Opportunities

- Establish better linkages and promotion of historical assets and maritime heritage, such as Hastings Castle, Hastings Fisherman's Museum and the Shipwreck Museum.
- Creation of traffic free zones / areas.
- Cohesion and placemaking of events and activities within the centre.
- Improvements to public realm (increased provision of seating and greening).
- Place making and promotion together with the town centre and beyond.

Threats

- High business operating costs
- Risk of stagnation if placemaking and marketing of the centre is not promoted effectively

4. St Leonards District Centre Health Check

Overview

118. St Leonards is a district centre located to the west of Hastings town centre. Also referred to as St. Leonards on Sea, the centre straddles a number of conservation areas and is renowned for its architectural quality, arts and scenic seaside views.
119. Marine Court local centre sits nearby, to the west of St Leonards, along the A259. For the purposes of this health check, the two centres have been analysed in combination, and so reference to St Leonards may also relate to the centre of Marine Court.
120. St Leonards hosts a mix of national multiples and independent shops. Key retail areas include Kings Road (the main shopping artery for the centre with a direct pedestrian route to and from St. Leonard's Warrior Square Railway Station) with a mix of independent shops, cafes and art galleries, Norman Road with a concentration of art galleries, antique shops, vintage boutiques and leisure provision such as the Kino-Teatr (cinema, theatre and live music) and London Road which has a variety of shops catering for the day-to-day needs of the surrounding catchment as well as food and beverage provision.
121. Being adjacent to the seafront it also benefits from tourism spend with historical sites and year-round cultural events attracting visitors.

Figure 30: St Leonards District Centre and Marine Court Local Centre Map and Draft Local Plan Boundary

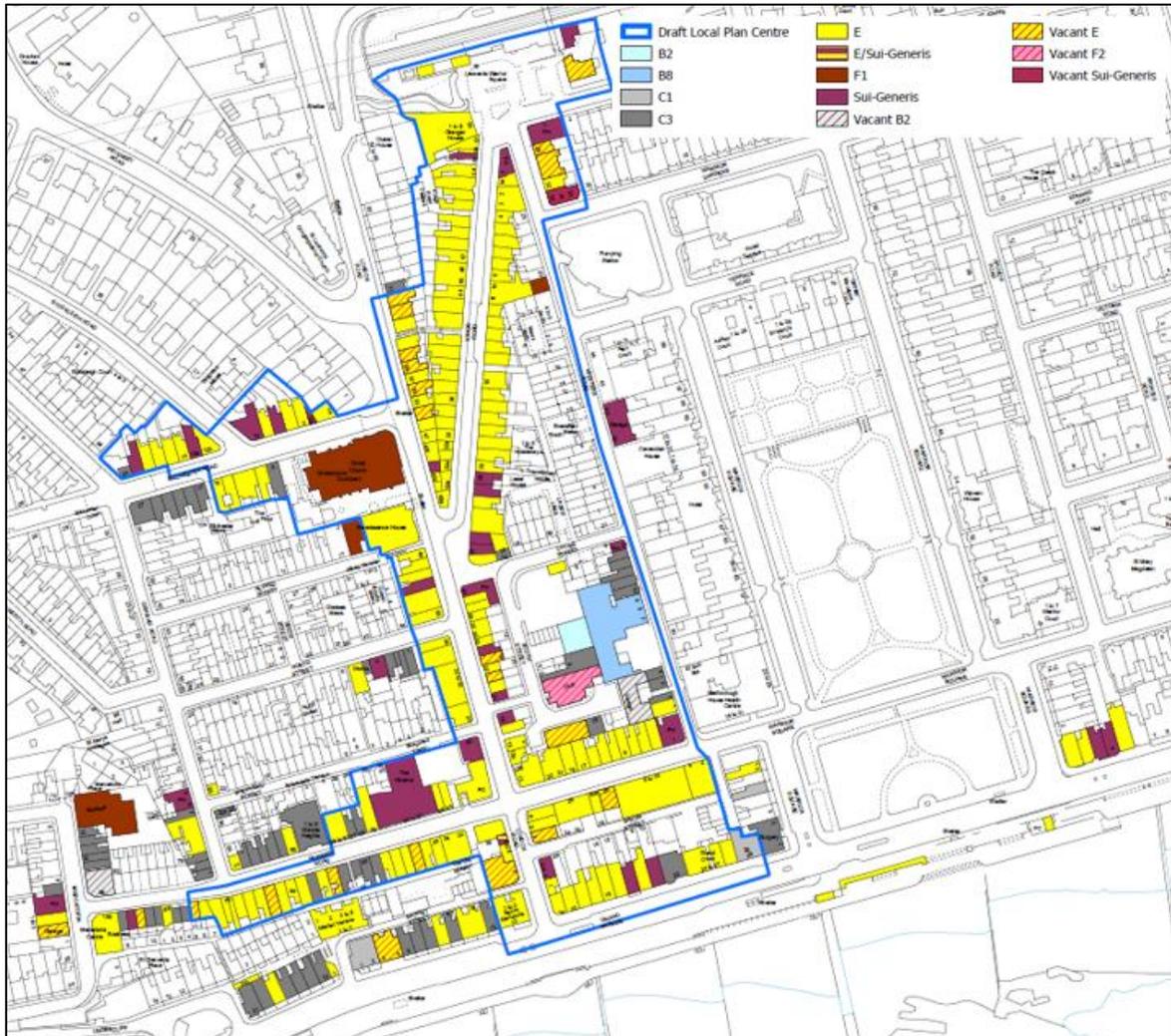


Source: Hastings Borough Council

Diversity of Uses

122. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within St Leonards. The figures below are indicative maps of these uses.

Figure 31: St Leonards Diversity of Uses Map



Source: Hastings Borough Council

Figure 32: Marine Court Diversity of Uses Map



Source: Hastings Borough Council

123. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 33: St Leonards District Centre Diversity of Uses (including Marine Court Local Centre)

Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	174	75.3%
F1 & F2	Local Community (incl. local shops) and Learning	4	1.7%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	26	11.3%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	2	0.9%
Vacant		25	10.8%
Total		231	100.0%

Source: Hastings Borough Council

124. Of the 231 units, 174 (75.3%) of these are E class use, which includes shops, cafes & restaurants, galleries and medical & health services.
125. Convenience food store provision is anchored by Co-op Food, located along London Road in the heart of the centre. Co-op Food is supported by Premier, Londis and

Spar as well as other smaller, international produce traders such as Corner Market and Azmar.

126. Galleries play a key role within the centre, with 18 identified within the survey, many of which are found along Norman Road.
127. There is a strong and eclectic mix of cafes and restaurants across the centre. Cafes include Dandelion Deli and Fika@44 along Kings Road as well as Dark Circles and Poffley's Coffee Shop along Marine Court. An array of cuisines are on offer in St Leonards ranging from Lebanese (Liban Coast) to Italian (Pizzarelli) and from Sri Lankan (Colombo 16) to Caribbean (Mama Putts).
128. Financial and professional services on offer include Nationwide Building Society bank along London Road and Alexander Estates (estate agents) along Kings Road.
129. Of the 26 Sui-Generis operators, many of them are drinking establishments (largely pubs) and takeaways.
130. 25 units were found to be vacant, which represents 10.8% of units analysed for the purposes of this study. Experian Goad's 2024 UK average is 14.1%.
131. Almost two thirds of these vacant units can be found along London Road and Norman Road. Some of the vacant units within the centre have been granted permission for residential use, whilst others are visibly being refurbished.

Multiple and Independent Representation

132. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. St Leonards has a limited number of national multiples including Co-op Food, Nationwide and Boots Pharmacy.
133. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. St Leonards has a range of independent outlets, including Bayte (restaurant), La Collina Gardens (florist) and The St Leonards Grocery (green grocers).

Commercial Rents and Yields

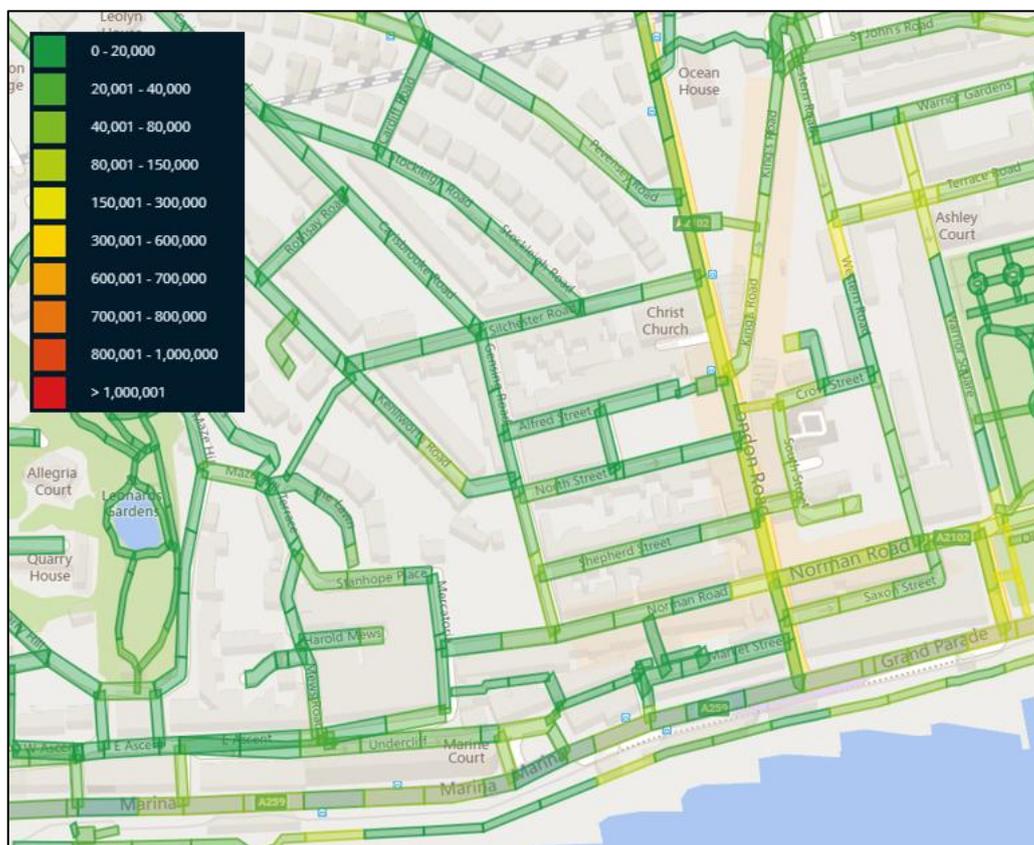
134. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
135. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

136. The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
137. A broad estimate of prime Zone A rental tone within St Leonards would indicate a rental level in the region of £160/sqm (£15/sqft) – £215/sqm (£20/sqft).
138. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
 - Prime high street yields – 6.75%
 - Good secondary high street yields – 9%
 - Secondary high street yields – 12%

Pedestrian Flows

139. The figure below illustrates the pedestrian heat map for St Leonards district centre as of May 2024 and shows that there are no particular footfall hot spots within the centre. Footfall levels are however generally highest along London Road.

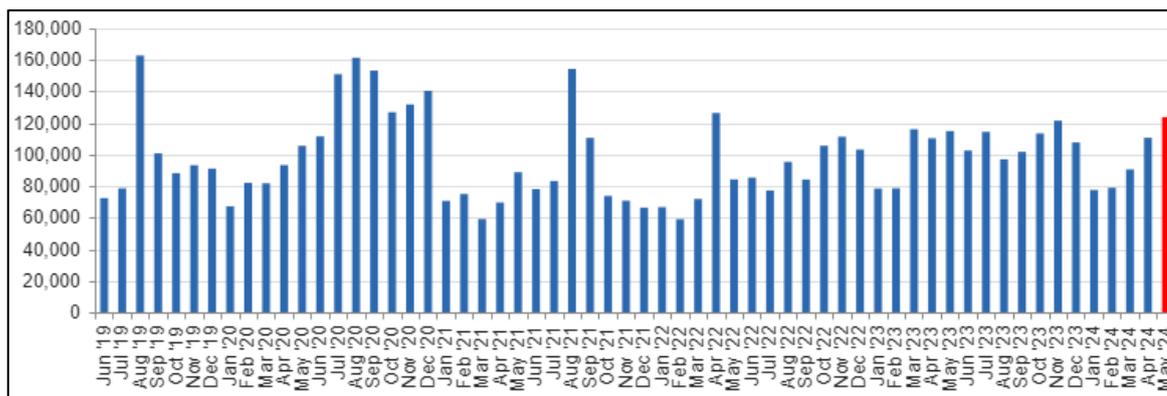
Figure 34: St Leonards District Centre Footfall Heat Map



Source: MSCl

- 140. A section along London Road (by the London Road/ Norman Road junction) was sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
- 141. As can be seen in the figure below, the impact of the pandemic was limited – footfall levels have been relatively stable throughout the period shown.
- 142. August represented the peak month in 2019 (from June onwards) (163,000), 2020 (161,000) and 2021 (154,000). This was not the case in 2022 or 2023, however. Monthly figures have not surpassed 130,000 since August 2021.

Figure 35: Monthly Footfall Graph, London Road, June 2019 - May 2024

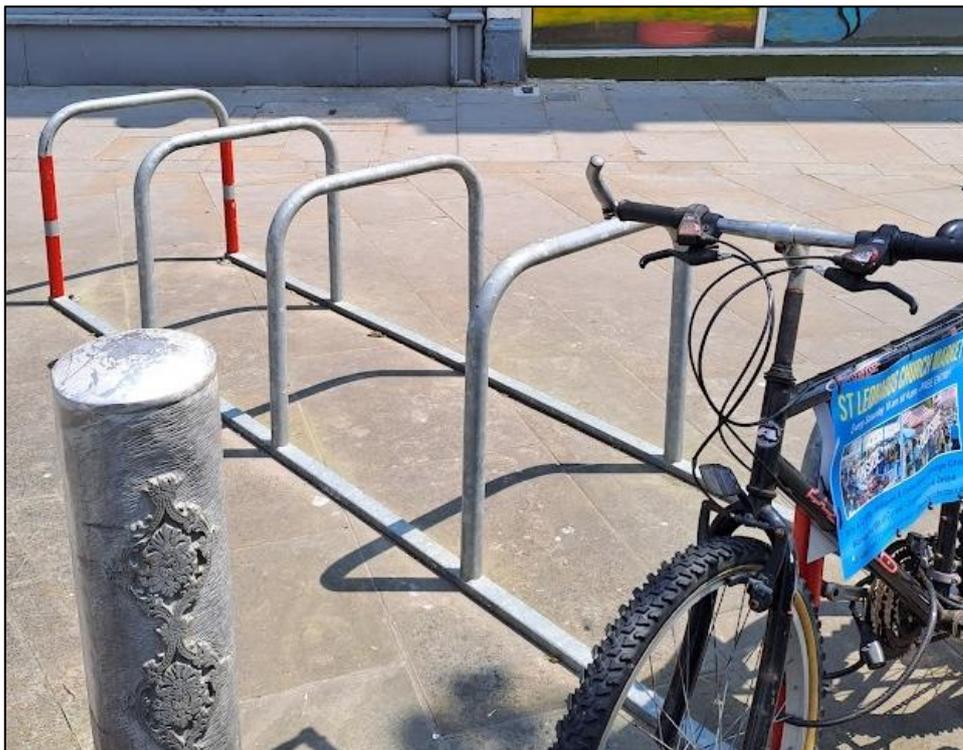


Source: MSCI

Accessibility

- 143. St Leonards Warrior Square train station can be found at the northern edge of the district centres. Services run frequently and can be used for connections to Hastings, Rye, Eastbourne and beyond. Bus services can be joined on the A259 heading east and west, as well as along London Road heading north to Silverhill and beyond.
- 144. The A259 runs along the southern edge of the centre, connecting to Hastings, Ore, Rye and beyond to the east and Eastbourne to the west.
- 145. Limited parking is available to the south of the train station (within the district centre) with more available to the north (outside of the district centre). Crystal Square car park offers a more central parking option with 27 spaces with direct pedestrian routes onto London Road and Kings Road. On street parking is available in places, such as along Grand Parade and Norman Road.
- 146. Pavements are of ample width in large parts of the centre, with Kings Road in particular providing a pleasant experience for those on foot, with traffic calming measures found along the road. Cycle racks can be found along Kings Road as well as by the train station.

Figure 36: Cycle Racks, St Leonards

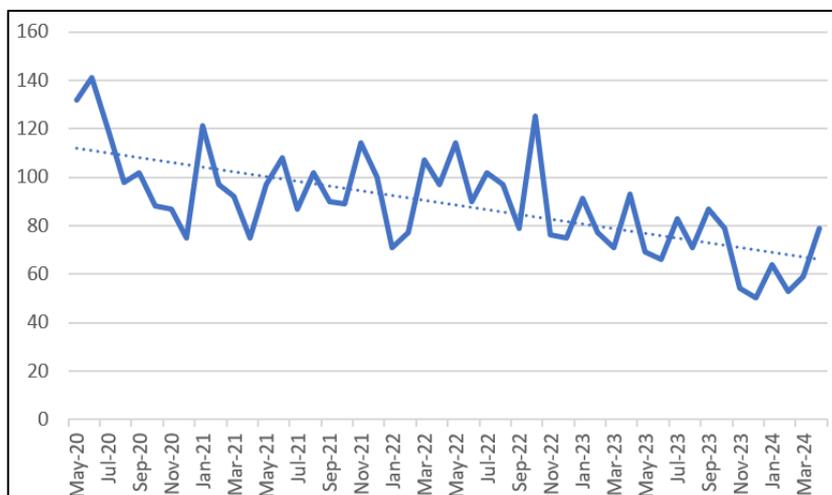


Source: LSH Site Visit

Crime and Safety

- 147. A central postcode within St Leonards was used to review total crime data within a ¼ mile radius between May 2020 and April 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 148. As can be seen, recorded crime levels have declined quite considerably during this period.

Figure 37: Recorded Crimes, St Leonards, May 2020 - April 2024



Source: UKCrimeStats

Environmental Quality

149. The environmental quality of St Leonards is fair, with a decent amount of street furniture but limited examples of greenery and vibrancy.
150. Examples of some tired frontages can be found along Norman Road and London Road.
151. Trees line Kings Road to provide some greenery, whilst Warrior Square Gardens can be easily accessed to the east of the centre, providing an open green space for people to sit and enjoy.
152. Christ Church and the Hastings Advice & Representation building stand out as having historical and architectural significance within the centre.

Figure 38: Christ Church, St Leonards



Source: LSH Site Visit

Barriers to Business

153. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:

- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
- Brexit – adding complexities and costs to the price of goods.
- Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough’s residents and businesses.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

154. The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g., energy prices), labour shortages, and the squeeze on household income from the cost-of-living crisis which combined are impacting on business viability and growth potential.

Evening and Night Time Economy

155. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within St Leonards have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

156. As outlined below, the centre offers a strong range of restaurants with a variety of cuisines available. A select number of pubs and bars are open late into the evening.

Figure 39: Heist, St Leonards



Source: LSH Site Visit

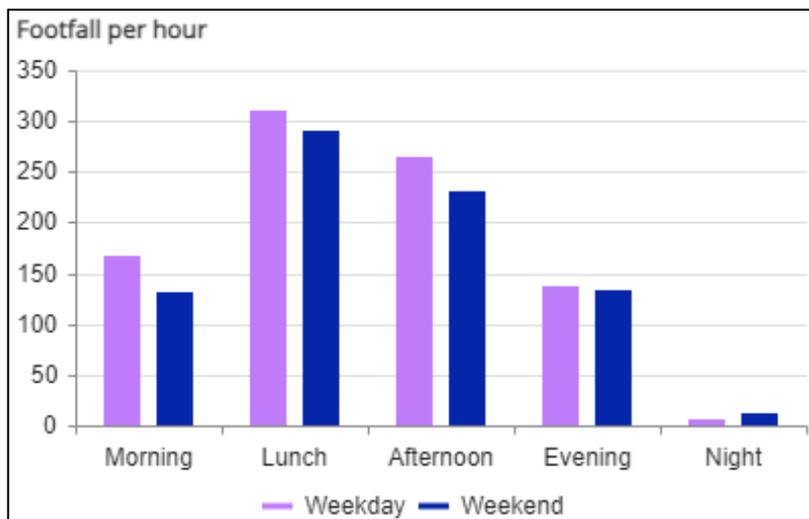
157. Food court, Heist, is a modern and vibrant venue that provides shared, central seating with small operators dotted around to choose from. Similarly to the centre itself, a range of cuisines are on offer, as well as coffee shop Bolthouse Coffee and taproom The Three Legs Brewing Co.

Figure 40: Leisure Operator Sample

Retailer Name	Type	Open	Close
Colombo 16	Sri Lankan Restaurant	11:30am	9-10:30pm
Liban Coast	Lebanese Restaurant	11am-5pm	4-9pm
Half Man! Half Burger!	Burger Restaurant	12-5pm	9pm
Galleria Seafood Bar	Seafood Restaurant	12pm	8pm
Heist Market	Food Market	9am	6pm-12am
The St Leonard	Pub	4-5pm	9-11pm
Old England	Pub	8:30am-12pm	11:30pm-2am
BAYTE	Restaurant	7am-12pm	4pm-12am
Wermut Bar	Bar	5pm	10-11pm

158. The figure below shows how footfall levels differ across different parts of the day (taken from the same location as used within the Pedestrian Flows section). As can be seen, footfall in an evening (5pm – 9pm) drops to a level similar to what is seen in the morning. The fall in footfall numbers from afternoon to evening is not a particularly drastic one.

Figure 41: Time of Day Footfall



Source: MSCI

Conclusion

159. St Leonards is a vital and viable district centre with a strong sense of identity and offer. It serves its immediate catchment well whilst also drawing people from beyond, both due to its natural assets (seafront location) and its arts and leisure offer.
160. The low vacancy rate is a good indication that the centre is performing well, whilst the move to re-purpose some of the vacant units for other uses is a positive sign that the centre can and will continue to adapt and be resilient.
161. Whilst footfall levels have been strong and stable in recent years, the summer peaks that were once seen have subsided, indicating that the centre is slightly less seasonal than it was before.
162. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths

- Strong arts culture
- Seafront location
- Nearby, accessible green open space (Warrior Square Gardens and St. Leonard's Gardens)
- Strong provision and mix of convenience/ food store operators
- Below average vacancy rate

- Strong and eclectic mix of cafes and restaurants with a range of cuisines on offer
- Train station providing connections to large towns and cities
- Good overall accessibility – car parking, road networks, pedestrian routes, cycling provision
- Declining rate of criminal activity
- Good evening provision and footfall levels

Weaknesses

- Summer footfall spikes seen from 2019 to 2021 have not continued into 2022 and 2023
- Limited greenery and vibrancy within the centre itself
- Tired shop frontages in parts of the centre
- Poor placemaking and linkages to the seafront

Opportunities

- Continue to tackle vacancies by looking to alternative uses (e.g., residential)
- Improvements to greening and vibrancy within the centre (e.g., through hanging baskets or planters)
- Coordinated place and promotion of the centre and the seafront

Threats

- High business operating costs
- Risk of stagnation if placemaking and marketing of the centre is not promoted effectively

5. Silverhill District Centre Health Check

Overview

- 163. Silverhill is a district centre in the Borough that is well connected to the surrounding areas through a network of roads (A21) and public transport.
- 164. The centre has a mix of operators including national chains and local independents. Retail areas include Sedlescombe Road North which is the main thoroughfare to the shops and service businesses and London Road that offers a further mix of small-scale operators.
- 165. The centre is dominated by the large in-centre Asda supermarket, found to the west of the Silverlands Road/ Sedlescombe Road North / London Road/ Sedlescombe Road South junction. The store's offer includes a pharmacy and opticians, as well as a new KFC unit offering take away and a dine-in experience.

Figure 42: Silverhill District Centre Map and Draft Local Plan Boundary

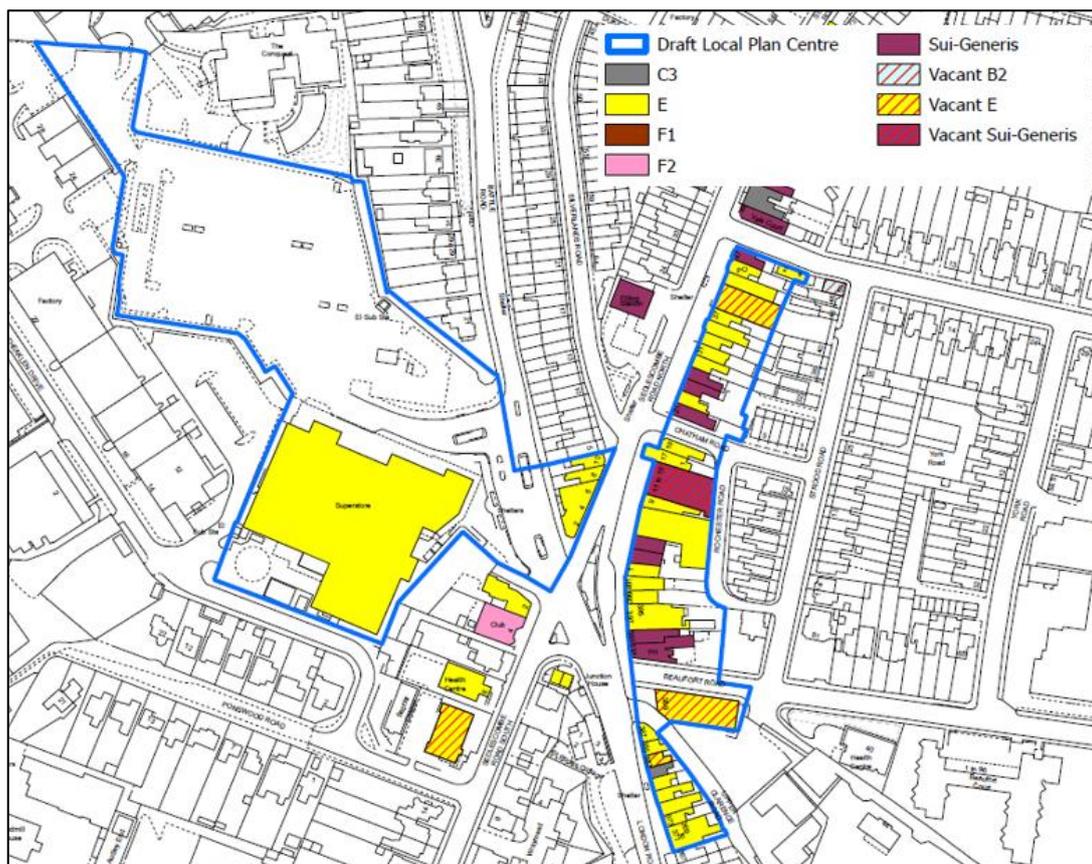


Source: Hastings Borough Council

Diversity of Uses

- 166. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Silverhill district centre. The figure below is an indicative map of these uses.

Figure 43: Silverhill Diversity of Uses Map



Source: Hastings Borough Council

167. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 44: Silverhill District Centre Diversity of Uses

Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	28	70.0%
F1 & F2	Local Community (incl. local shops) and Learning	0	0.0%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	8	20.0%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	0	0.0%
Vacant		4	10.0%
Total		40	100.0%

Source: Hastings Borough Council

168. Of the 40 units, 28 (70%) of these are E class use, which includes shops, cafes and retail services.

-
169. The centre is dominated by the Asda store that sits to the west of the centre. The store is c.5,400sqm in its total footprint and houses a KFC, pharmacy, opticians and travel money bureau. It has a large, dedicated car park as well as a petrol station and a grocery collection hub for online orders.
170. To the east of the centre, E class uses along London Road and Sedlescombe Road North include a second-hand furniture store (Portobello Furniture), small food convenience stores (One Shop Convenience and Hastings Convenience Store) and charity shops (The Sara Lee Trust Charity Shop and HRVAB Charity Shop for the Blind).
171. The 8 Sui-Generis operators are dominated by takeaways, but also include The Clarence (pub) and Betfred (betting shop).
172. 4 units were found to be vacant, which represents 10% of units analysed for the purposes of this study. Experian Goad's 2024 UK average is 14.1%.

Multiple and Independent Representation

173. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. The Asda store dominates the offer in Silverhill, with KFC and Betfred also present.
174. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Silverhill has a select number of independent outlets, including St Leonards Florists and Portobello Furniture.

Figure 45: St Leonards Florist, Silverhill



Source: LSH Site Visit

Commercial Rents and Yields

175. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rents, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
176. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.
177. The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
178. A broad estimate of prime Zone A rental tone within Silverhill would indicate a rental level in the region of £160/sqm (£15/sqft) – £215/sqm (£20/sqft).
179. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment.

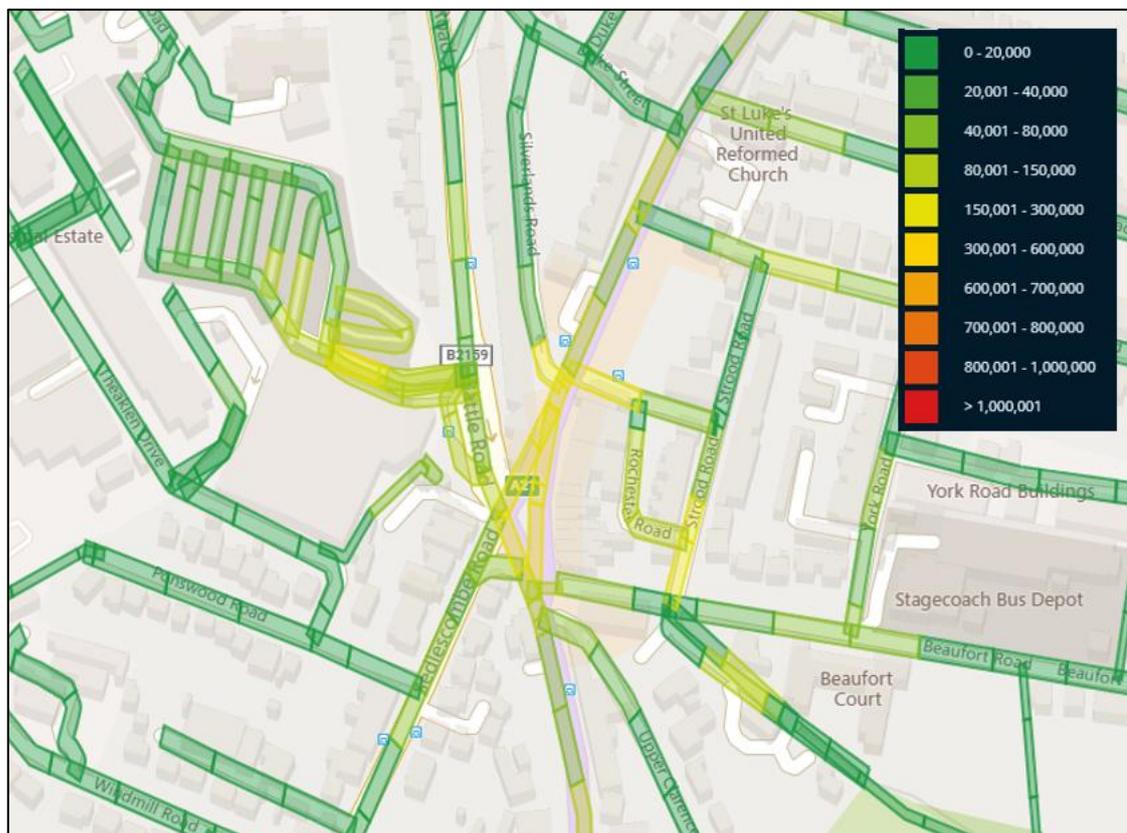
Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%

Pedestrian Flows

180. The figure below illustrates the pedestrian heat map for Silverhill district centre as of May 2024 and shows particular concentrations of footfall at the Sedlescombe Road/ London Road/ Battle Road junction and to the front of the ASDA store.

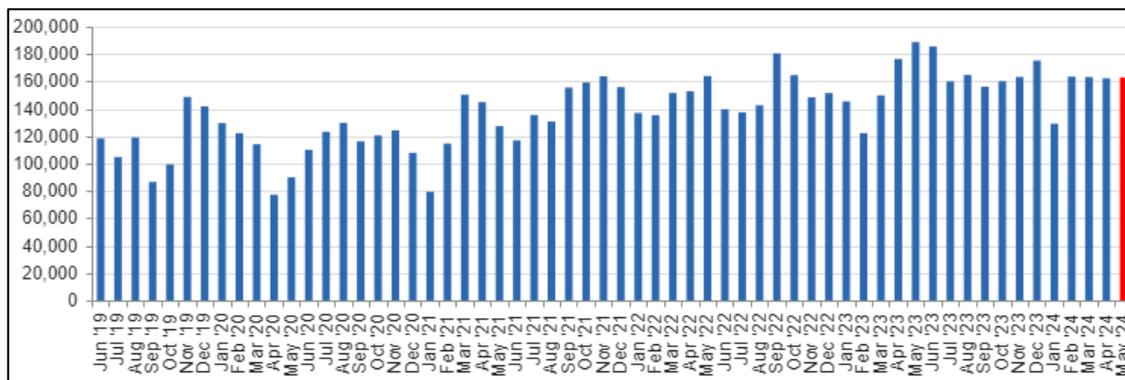
Figure 46: Silverhill District Centre Footfall Heat Map



Source: MSC1

181. A section at the Sedlescombe Road/ London Road/ Battle Road junction has been sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
182. As can be seen in the figure below, footfall levels were minimally impacted by the pandemic and have been steadily growing during this period.

Figure 47: Monthly Footfall Graph, Sedlescombe Road/ London Road/ Battle Road junction, June 2019 - May 2024



Source: MSCI

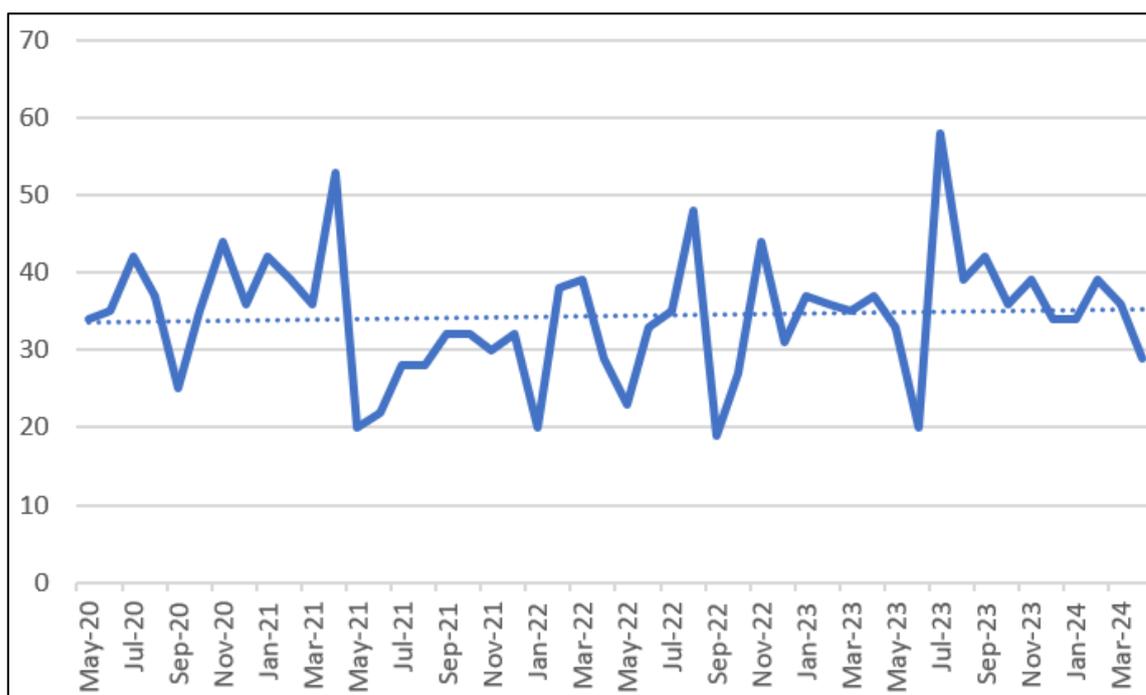
Accessibility

- 183. Silverhill is located at the cross junction of Sedlescombe Road South, Sedlescombe Road North, London Road and Battle Road. As a result, the district centre is dominated by traffic, creating both noise and air pollution and a challenging centre for pedestrians to navigate, particularly when crossing the six lanes of traffic to get to or from the Asda store.
- 184. Bus routes provide connections in all directions, whilst the bus stop located at the southern edge of Battle Road by the Asda store provides a convenient link for those visiting the centre to do their food shopping.
- 185. Bike racks are available within the centre, encouraging a sustainable and active mode of transport.

Crime and Safety

- 186. A central postcode within Silverhill was used to review total crime data within a ¼ mile radius between May 2020 and April 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 187. As can be seen, recorded crime levels have been stable during this period.

Figure 48: Recorded Crimes, Silverhill, May 2020 - April 2024



Source: UKCrimeStats

Environmental Quality

188. The environmental quality of Silverhill is damaged by the dominance of the several lanes of traffic that cut through the centre, making it difficult for pedestrians to navigate from east to west, as well as creating noise and air pollution.
189. Trees can be found within the centre, but there is a general lack of vibrancy or colour that could be provided through the use of planters or hanging baskets.
190. Street furniture can be found around the centre in the form of bins, benches, lampposts, bollards and bike racks.

Barriers to Business

191. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
 - Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
 - Brexit – adding complexities and costs to the price of goods.
 - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).

- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough’s residents and businesses.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

192. The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g., energy prices), labour shortages, and the squeeze on household income from the cost-of-living crisis which combined are impacting on business viability and growth potential.

Evening and Night Time Economy

193. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre.

194. There is a limited provision of evening establishments within the centre. The Clarence pub is central to Silverhill, with opening hours of 11am to 10-11pm. The Welcome pub falls just outside of the district centre boundary, serving food through the day and closing as late as 11pm.

195. Several takeaways are located within the centre however these may not necessarily be driving genuine visitor footfall due to the delivery nature of their service.

Figure 49: Pizza Go Go, Silverhill



Source: LSH Site Visit

196. Away from leisure operators, Asda remains open until 11pm on most days, driving some footfall and activity in the evening.

Conclusion

197. Silverhill is a functioning district centre that benefits from the large Asda store to the west. Its parades of smaller retail and leisure units to the east satisfactorily serve the immediate catchment whilst the large supermarket store allows the centre to draw visitors from beyond due to its size, car park and accompanying services.
198. Footfall levels have been growing in recent years, although the dominance of several lanes of traffic that cut through the centre provide a challenge for navigation from east to west and is a mark on the overall accessibility (particularly for pedestrians) and environmental quality of the centre. This combined with other environmental quality factors such as a lack of greenery and vibrancy across the centre create the potential, if addressed, for pedestrian activity to increase further.
199. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths

- Food store provision – Asda store supported by smaller operators
- Lower vacancy rate than UK average
- Growth in footfall in recent years

Weaknesses

- Centre dominated by several lanes of traffic
- Pedestrian accessibility compromised due to road network
- Lack of greenery and vibrancy across the centre
- Lack of evening leisure provision (pubs and restaurants)
- The food and beverage offer is heavily dominated by fast food and takeaway outlets

Opportunities

- Introduction of more greenery and vibrancy (e.g., hanging baskets or planters)
- Traffic calming measures

Threats

- High business operating costs

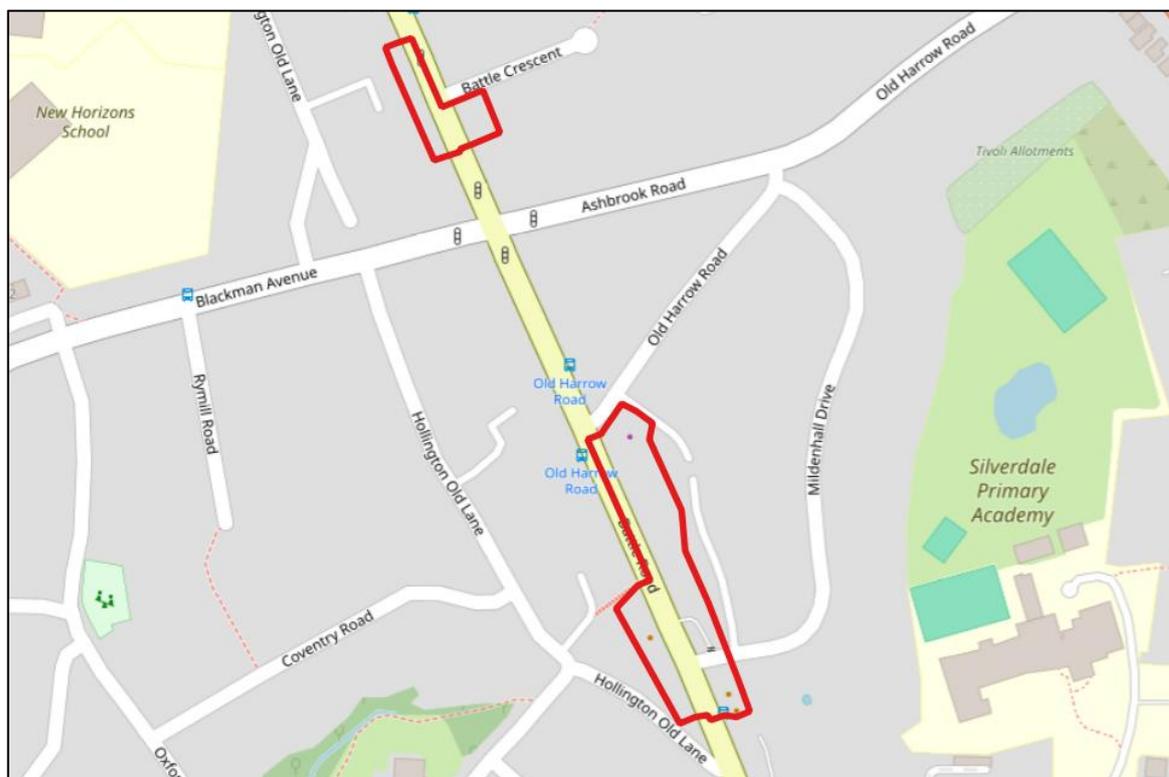
6. Local Centre Health Checks

- 200. Local shopping centres play an important role, serving the day to day needs of their immediate catchments and playing a supporting role to the larger town and district centres.
- 201. This section sets out a high-level review of the health of the local centres within the Borough.

Battle Road

- 202. Battle Road local centre is the northern-most centre within the Borough. Broken into two sections, one smaller part just north of the Ashbrook Road/ Battle Road/ Blackman Avenue junction and one just to the south, it sits 0.6km north of Silverhill and is connected by the B2159.
- 203. Community and health services can be accessed within the centre – Hollington library and South Cliff Dental Group practice.
- 204. Bus routes run along the B2159, through the centre, providing connections as far north as Hawkhurst and down to Hastings and St Leonards via Silverhill.

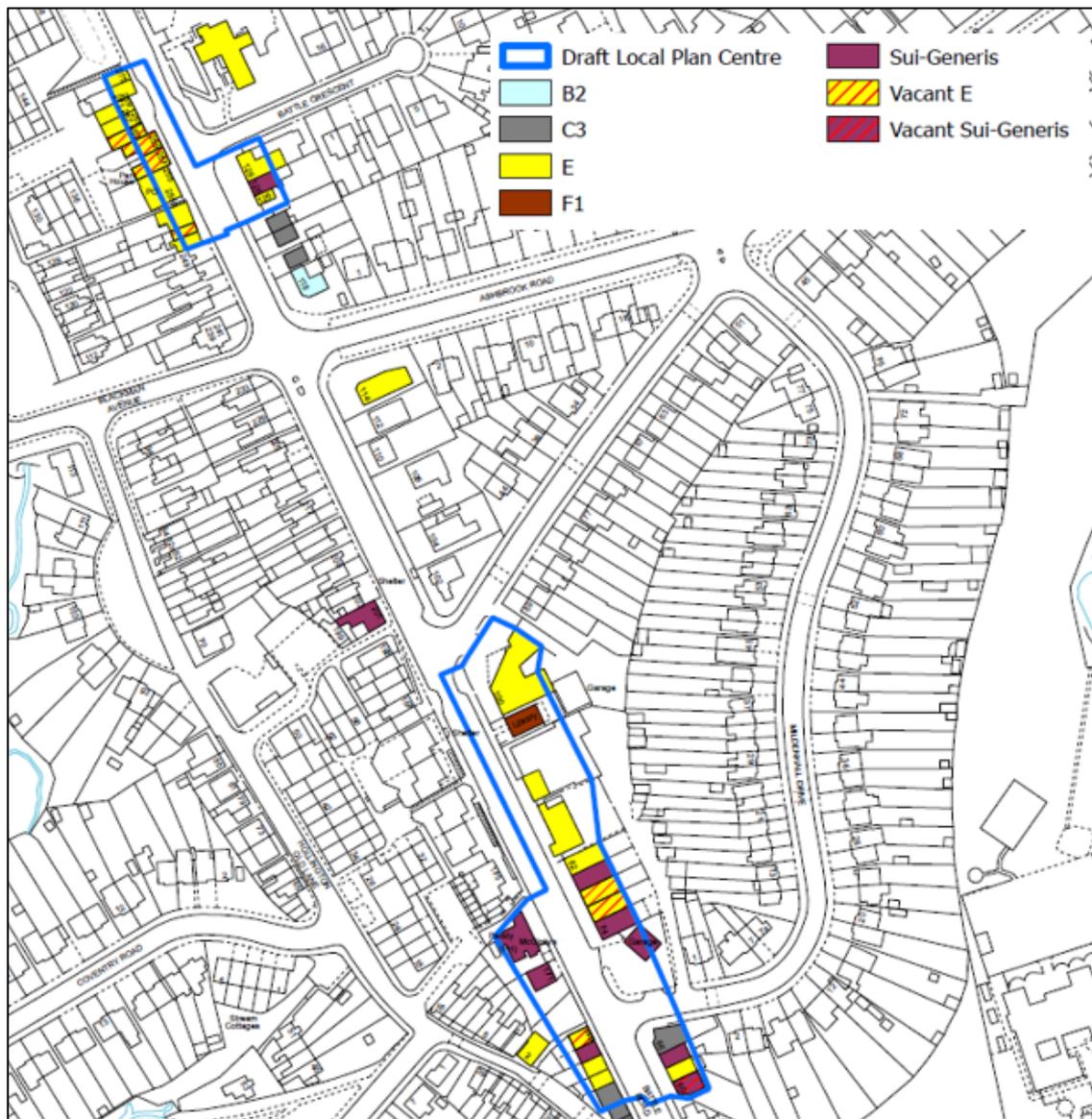
Figure 50: Battle Road Local Centre Map and Draft Local Plan Boundary



Source: Hastings Borough Council

- 205. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Battle Road local centre. The figure below is an indicative map of these uses.

Figure 51: Battle Road Diversity of Uses Map



Source: Hastings Borough Council

206. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

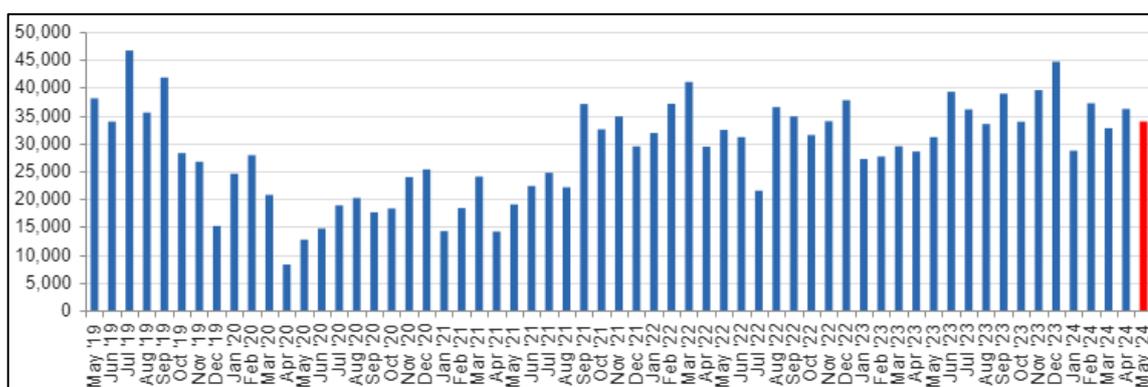
Figure 52: Battle Road Local Centre Diversity of Uses

Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	16	48.5%
F1 & F2	Local Community (incl. local shops) and Learning	1	3.0%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, laundrettes and more	8	24.2%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	0	0.0%
Vacant		8	24.2%
Total		33	100.0%

Source: Hastings Borough Council

- 207. Of the 33 units, 16 (48.5%) of these are E class use, which includes Welcome Battle Road Convenience Store, Best One Xpress Convenience Store and Post Office, Lil Wendy’s (café), South Cliff Dental Group (dentist) and Hollington Pharmacy.
- 208. The 8 Sui-Generis operators include 5 takeaways, Coral (betting office) and Paddy McGinty’s (pub).
- 209. 8 units were found to be vacant, which represents 24.2% of units analysed for the purposes of this study. Experian Goad’s 2024 UK average is 14.1%.
- 210. Vacant units are disproportionately found within the northern section of the centre.
- 211. A section of Battle Road local centre has been sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
- 212. As can be seen in the figure below, footfall levels dropped in line with restrictions on movement and travel that were put in place as a result of the pandemic, but have bounced back strongly, with December 2023 representing the highest monthly figure (45,000) since August 2019 (47,000).

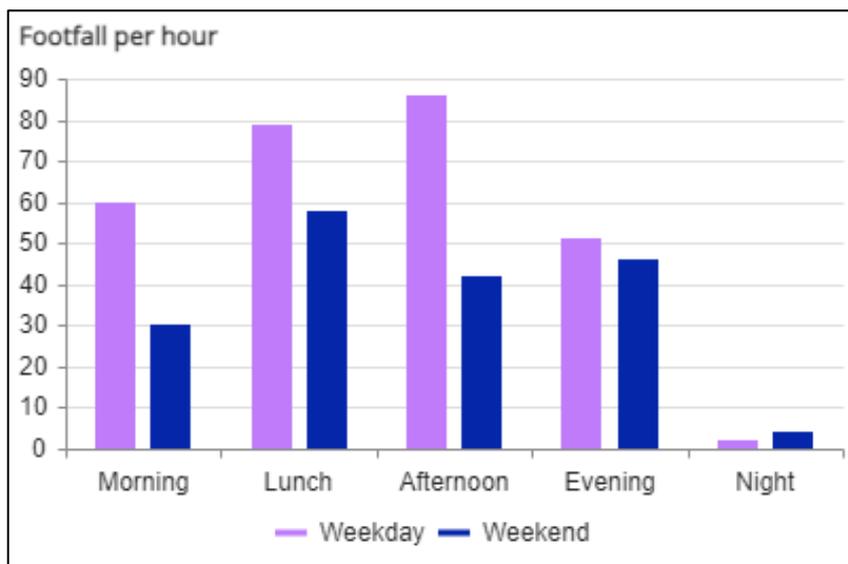
Figure 53: Monthly Footfall Graph, Battle Road, June 2019 - May 2024



Source: MSCI

- 213. The figure below shows that weekdays are consistently busier than weekends (with the exception of night time). Afternoons on a weekday are the busiest times.

Figure 54: Battle Road Local Centre, Time of Day Footfall



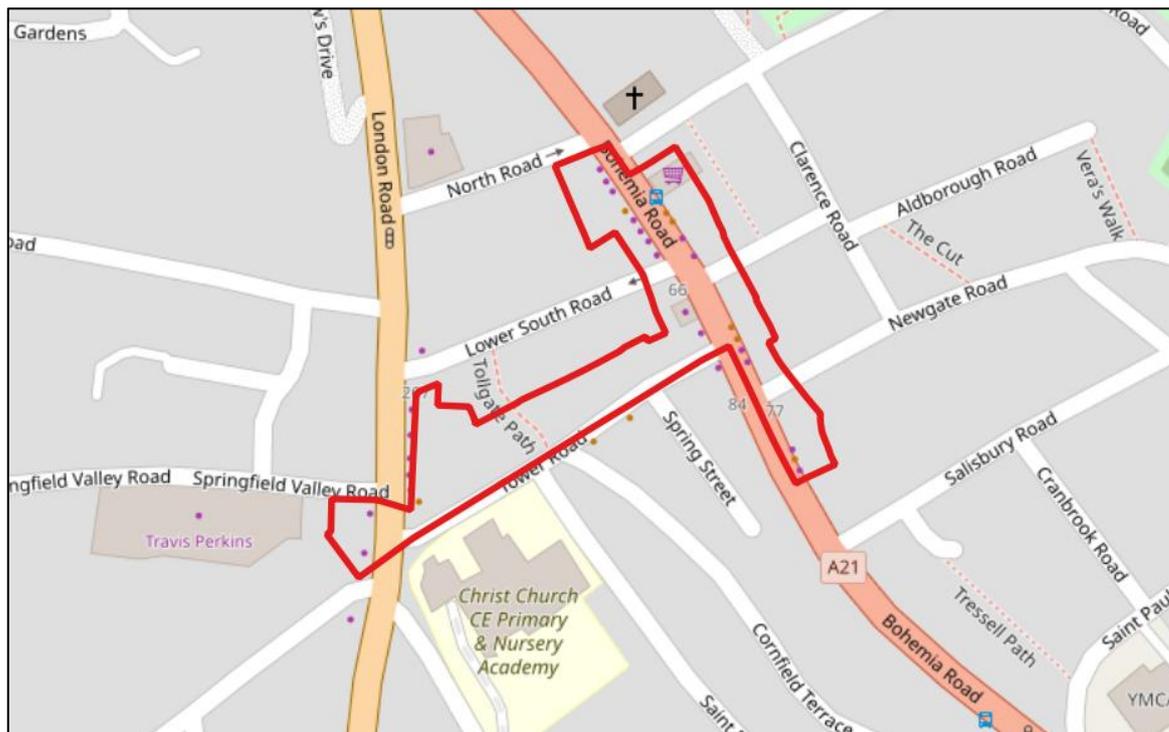
Source: MSCI

214. In summary, the southern section of the centre looks to be performing well and adequately serves the needs of its immediate catchment as well as the passing trade. However, the vitality and viability of the northern section of the centre looks to be vulnerable, with a disproportionate number of vacancies located here, along with a low quality of shop frontages. The performance of this area should be monitored closely going forward.

Bohemia & Tower

215. Bohemia & Tower local centre sits 0.5km south of Silverhill and 0.8km north of St Leonards. The centre covers the stretch of Bohemia Road running from Sanjana Store (convenience store) to the North Road junction, as well as the entirety of Tower Road and a small section of London Road.
216. The centre becomes disconnected along Tower Road as the majority of the street is residential. St Leonards-on-Sea Methodist Church falls just beyond the northern boundary of the centre, whilst Christ Church CE Primary and Nursery Academy falls just beyond the southern boundary.
217. Bus routes run along both London Road and Bohemia Road, with services providing connections to the town centre (Hastings) and three district centres (Old Town, St Leonards and Silverhill).

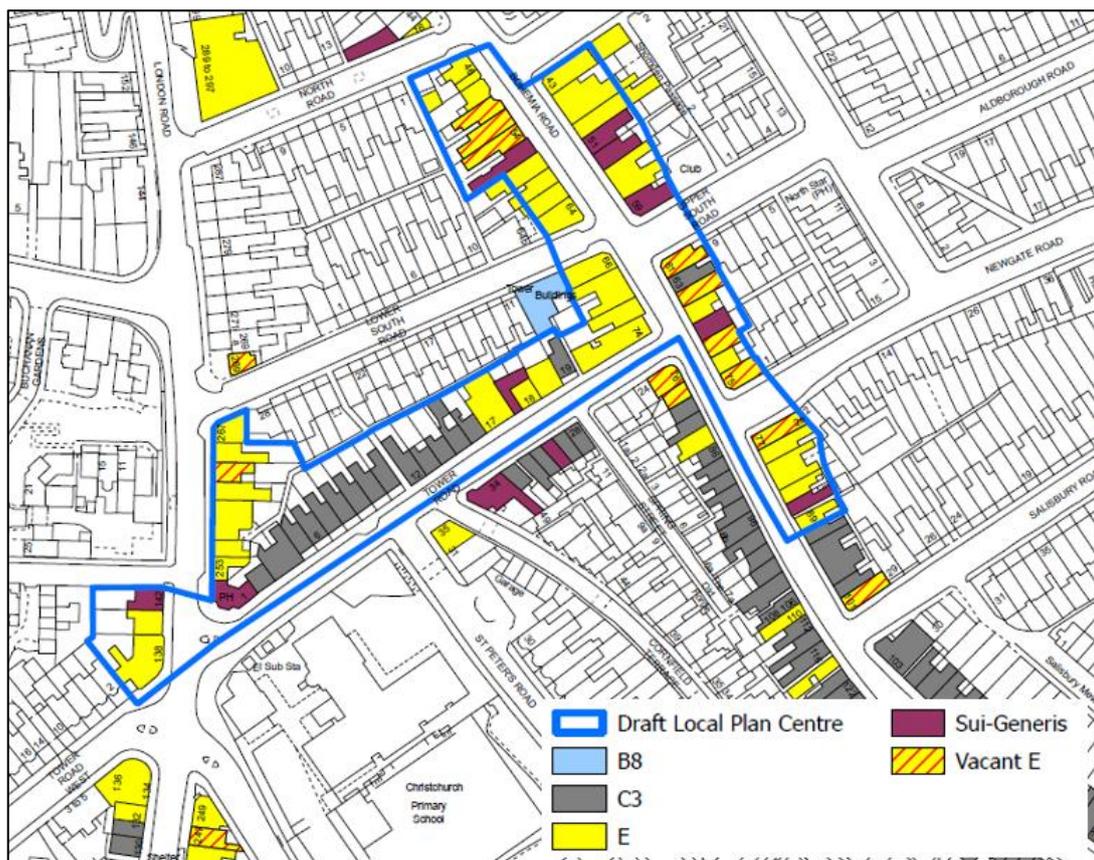
Figure 55: Bohemia & Tower Local Centre Map and Draft Local Plan Boundary



Source: Hastings Borough Council

218. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Bohemia & Tower local centre. The figure below is an indicative map of these uses.

Figure 56: Bohemia & Tower Diversity of Uses Map



Source: Hastings Borough Council

219. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 57: Bohemia & Tower Local Centre Diversity of Uses

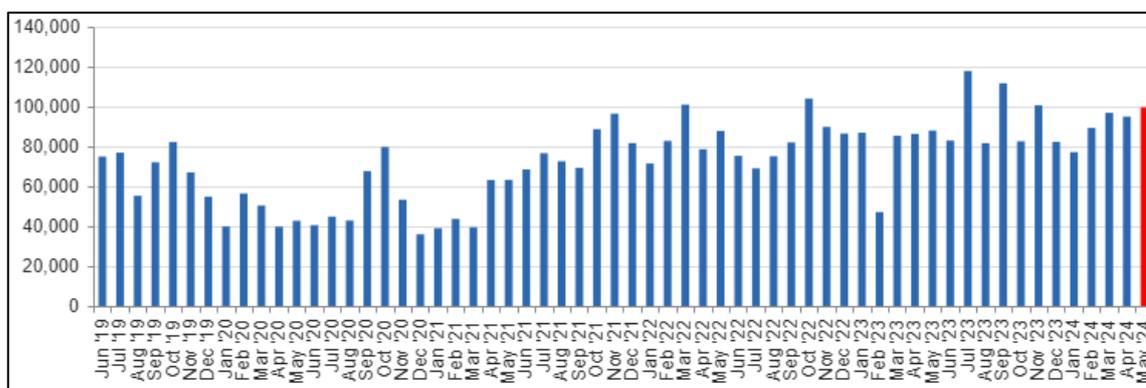
Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	34	65.4%
F1 & F2	Local Community (incl. local shops) and Learning	0	0.0%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	9	17.3%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	0	0.0%
Vacant		9	17.3%
Total		52	100.0%

Source: Hastings Borough Council

220. Of the 52 units, 34 (65.4%) of these are E class use, which includes food stores, bakeries, hairdressers, cafes and restaurants.

- 221. Food store provision comes from Co-op Food, Four Seasons Supermarket and Halsho Store – all located along London Road.
- 222. The 9 Sui-Generis operators include 5 takeaways as well as a launderette and pub (The Tower).
- 223. 9 units were found to be vacant, which represents 17.3% of units analysed for the purposes of this study. Experian Goad’s 2024 UK average is 14.1%.
- 224. A section of Bohemia & Tower local centre has been sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
- 225. As can be seen in the figure below, there has been a strong growth in footfall levels during this period, with peak months coming in July and September of 2023.

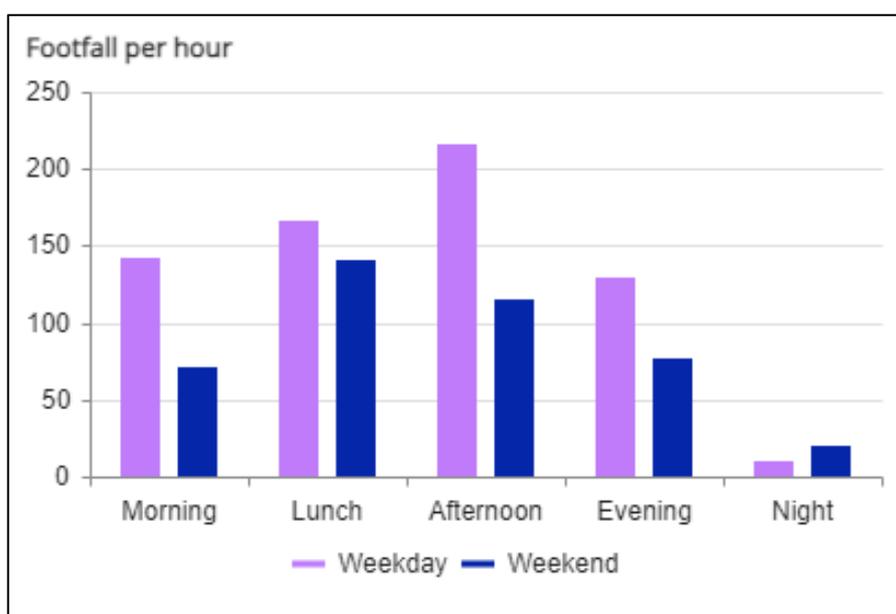
Figure 58: Monthly Footfall Graph, Bohemia Road, June 2019 - May 2024



Source: MSCI

- 226. The figure below shows that weekdays are consistently busier than weekends (with the exception of night time). Afternoons on a weekday are the busiest times.

Figure 59: Bohemia & Tower Local Centre, Time of Day Footfall



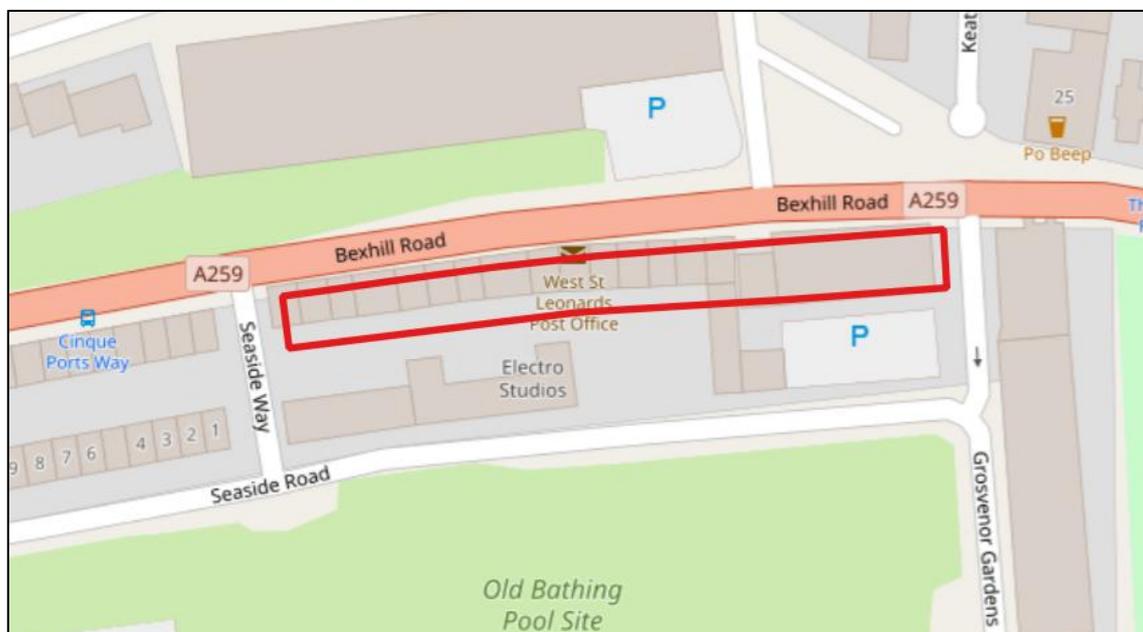
Source: MSCI

227. In summary, Bohemia and Tower is a vital and viable local centre that has a good mix of uses, allowing it to serve the day to day needs of its immediate catchment. In addition, its strategic location allows it to benefit from passing trade, although a lack of on street parking along Bohemia Road will limit its ability in that regard. The vacancy rate is a concern and should be monitored and proactively addressed if necessary.
228. Footfall levels have recovered well following the pandemic period and have even surpassed pre-COVID figures. Footfall figures are stable throughout the day. As such, the centre evidently plays a continuously pivotal role within the area.

West St Leonards (Bexhill Road)

229. West St Leonards (Bexhill Road) is a small local centre to the west of the Borough, consisting of a row of units along Bexhill Road (A259) between Grosvenor Gardens and Seaside Way.
230. The A259 connects the centre to St Leonards to the east (1.6km) and Bexhill to the west (4.8km). On street parking is available to the front of the units, making it convenient to pull in and access the centre whilst travelling along the south coast.
231. The centre faces a small retail park with large format stores - TK Maxx, Carpetright, Poundstretcher and Bensons for beds.

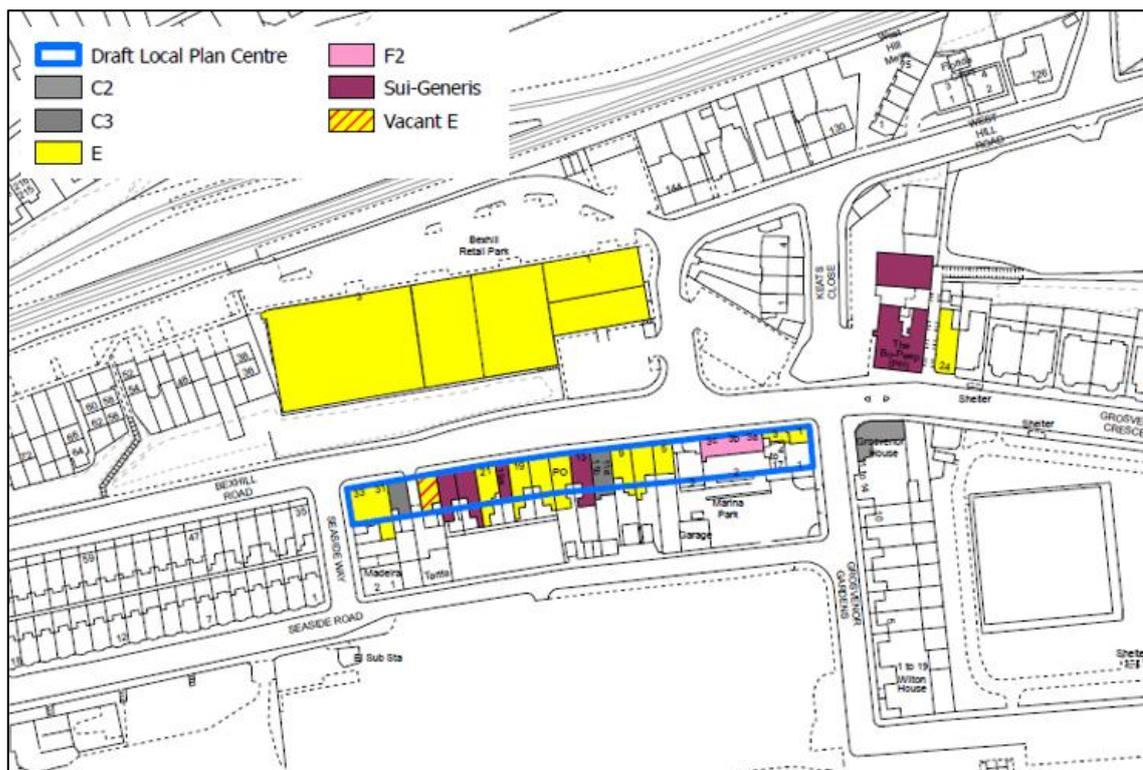
Figure 60: West St Leonards (Bexhill Road) Local Centre Map and Draft Local Plan Boundary



Source: Hastings Borough Council

232. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within West St Leonards (Bexhill Road) local centre. The figure below is an indicative map of these uses.

Figure 61: West St Leonards (Bexhill Road) Diversity of Uses Map



Source: Hastings Borough Council

233. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 62: West St Leonards (Bexhill Road) Local Centre Diversity of Uses

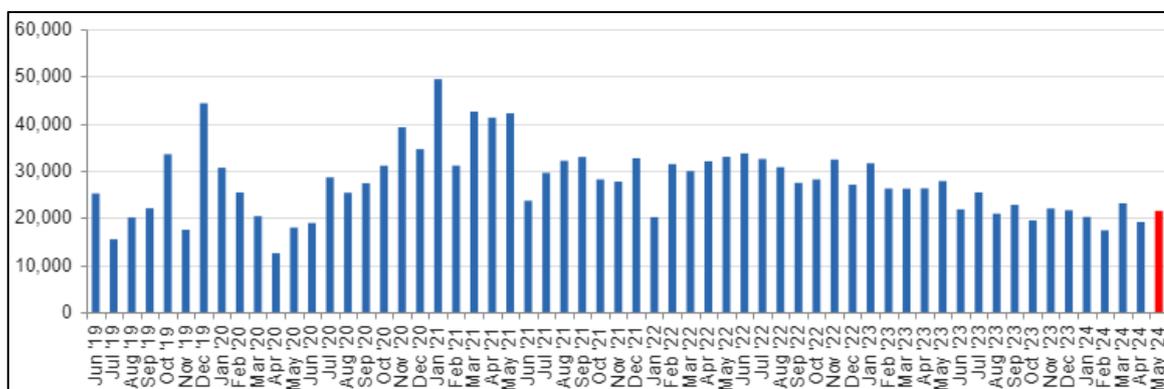
Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	10	62.5%
F1 & F2	Local Community (incl. local shops) and Learning	1	6.3%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	4	25.0%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	0	0.0%
Vacant		1	6.3%
Total		16	100.0%

Source: Hastings Borough Council

234. Of the 16 units, 10 (62.5%) of these are E class use, which includes Marina Park Stores Premier (convenience store), Sussex Fruits (greengrocer), J.A.Appleyard (butcher), West St Leonards Pharmacy and Jewel in the Gown (bridal clothing).
235. The 4 Sui-Generis operators cover 3 takeaways and a launderette.

- 236. 1 unit was found to be vacant, which represents 6.3% of units analysed for the purposes of this study. Experian Goad's 2024 UK average is 14.1%.
- 237. A section of West St Leonards (Bexhill Road) local centre has been sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
- 238. As can be seen in the figure below, footfall was hit at the beginning of the pandemic period (April 2020), but quickly recovered to a peak figure of 49,000 in January 2021. Since then however, pedestrian activity has been declining, with a low of 17,000 in February 2024.

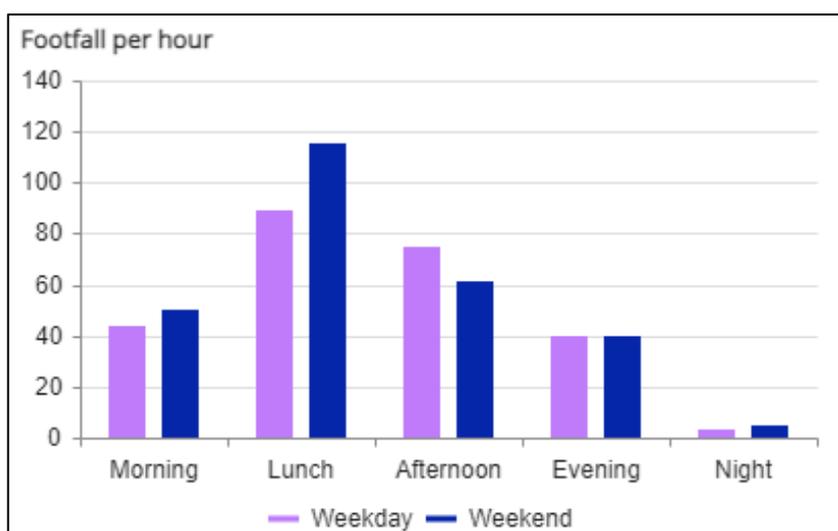
Figure 63: Monthly Footfall Graph, Bexhill Road, June 2019 - May 2024



Source: MSCI

- 239. The figure below shows that the busiest time is lunch time at the weekend. Footfall levels generally are relatively low.

Figure 64: West St Leonards (Bexhill Road) Local Centre, Time of Day Footfall



Source: MSCI

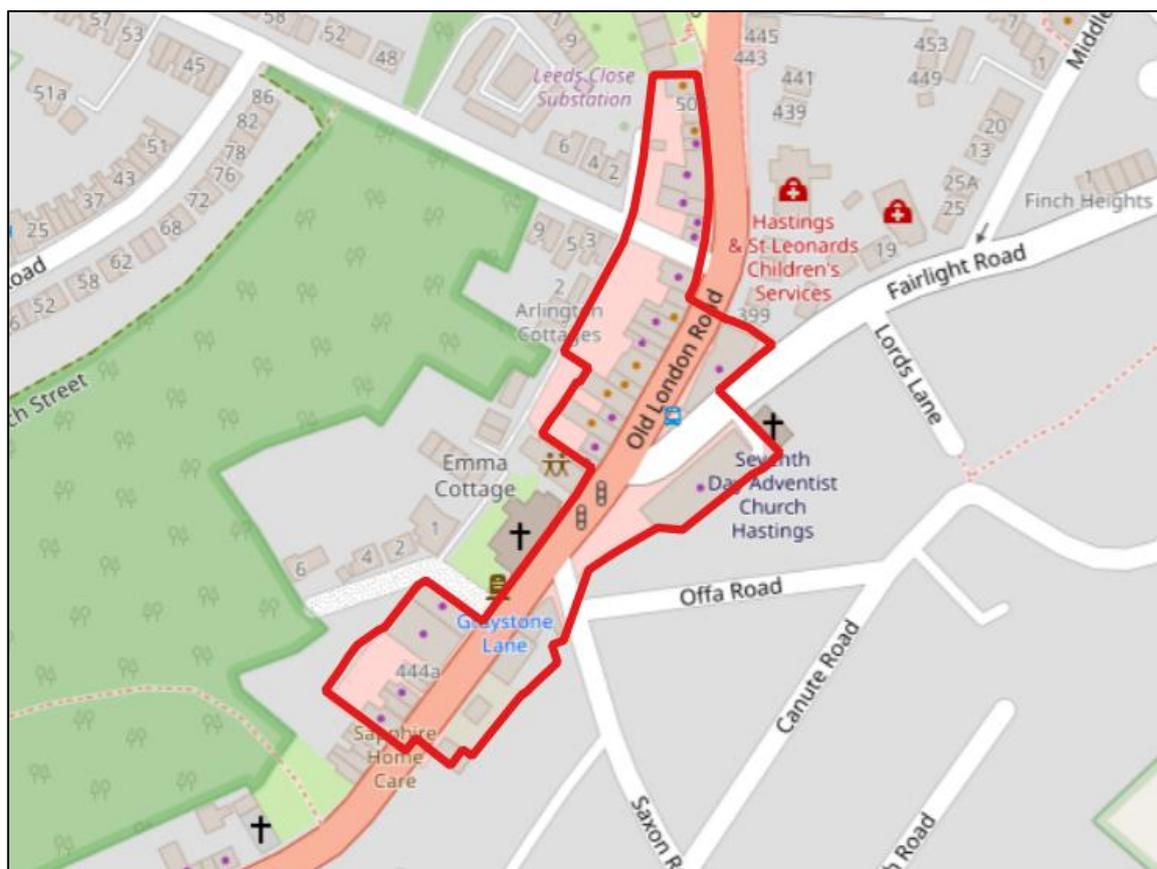
- 240. In summary, West St Leonards (Bexhill Road) local centre is vital and viable due to its ability to meet the day to day needs of locals through its mix of retail, leisure and services.

241. In addition, it is strategically located to benefit from passing trade due to it being situated along a busy A road and having on street parking. This ability to draw trade from beyond its immediate catchment helps to explain its particularly low vacancy rate, although declining levels of footfall are somewhat of a concern.

Ore Village

242. Ore Village is a local centre to the east of the Borough. It is located along the A259 which can be used to connect to Old Town, Hastings town centre and beyond.
243. Ore train station is located approximately 1.3km south west of the centre, and so is not particularly well connected to the local centre itself. Bus services however run through Ore Village and can be used for connections into Hastings town centre via Old Town, or north-east to Rye.
244. There is a strong provision of national multiples within the centre, including Tesco (Express), Co-op Food, KFC and Domino's. These are balanced by a selection of smaller-scale, local operators, such as Good on Greens (greengrocer) and The Rye Bakery.

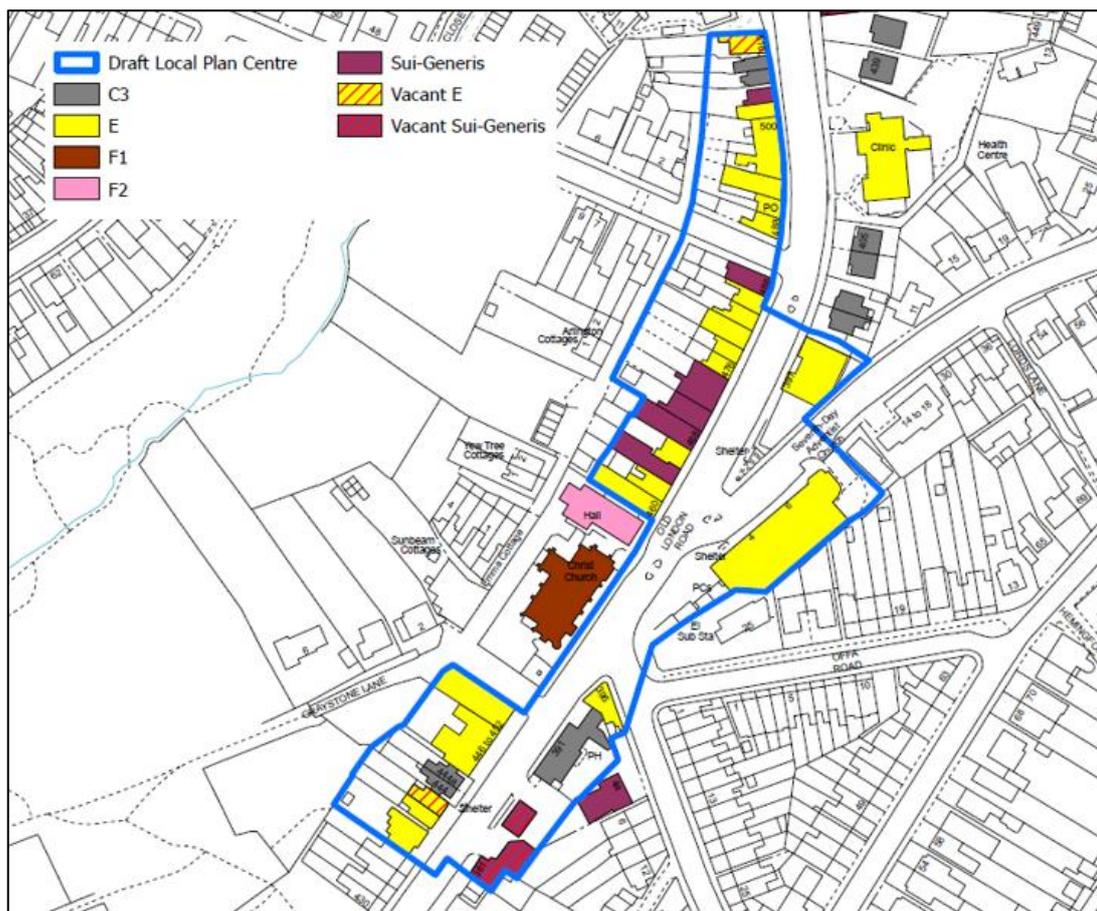
Figure 65: Ore Village Local Centre Map and Draft Local Plan Boundary



Source: Hastings Borough Council

245. Hastings Borough Council conducted a street level survey across May and June 2024 to record the usage of units within Ore Village local centre. The figure below is an indicative map of these uses.

Figure 66: Ore Village Diversity of Uses Map



Source: Hastings Borough Council

246. The table below shows the mix of uses for those units that fall within the draft local plan boundary. For the purposes of this study, only those that relate to retail and leisure uses have been analysed. These uses are E, F1 & F2, Sui-Generis and Vacant.

Figure 67: Ore Village Local Centre Diversity of Uses

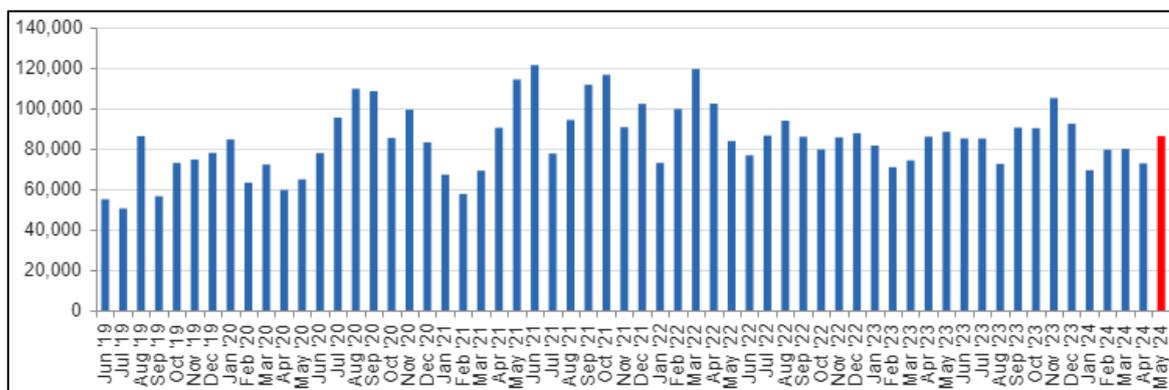
Use Class		No. of Outlets	% of Total Outlets
E	Commercial, Business and Service	20	69.0%
F1 & F2	Local Community (incl. local shops) and Learning	0	0.0%
Sui-Generis	Includes cinemas, pubs & bars, hot food takeaways, launderettes and more	6	20.7%
Mixed	E/F1, E/F2/Sui-Generis, E/Sui-Generis	0	0.0%
Vacant		3	10.3%
Total		29	100.0%

Source: Hastings Borough Council

247. Of the 29 units, 20 (69%) of these are E class use, which includes Tesco Express, Co-op Food, Laycock Pharmacy, Rye Bakery, Rustico (restaurant), Hastings Pet Centre as well as several health & beauty operators (hairdressers and barbers).

- 248. The 6 Sui-Generis operators cover 5 takeaways (including KFC, Domino’s Pizza and Pizza Hut Delivery) and a betting office (William Hill).
- 249. 3 units were found to be vacant, which represents 10.3% of units analysed for the purposes of this study. Experian Goad’s 2024 UK average is 14.1%. One of these vacant units was once a car sales dealership which has left behind a sizeable unused space in the centre.
- 250. A section of Ore Village local centre has been sampled to obtain information on how footfall levels have changed between June 2019 and May 2024.
- 251. As can be seen in the figure below, pedestrian activity has been relatively stable during this period, although growth can be seen from 2019 through to 2021/ early 2022, followed by a slight drop-off from late 2022 onwards.

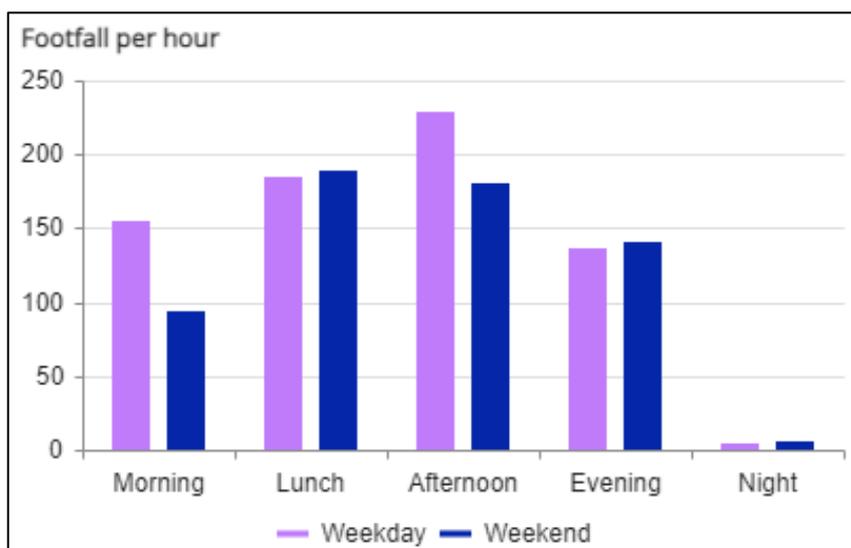
Figure 68: Monthly Footfall Graph, Old London Road, June 2019 - May 2024



Source: MSCI

- 252. The figure below shows that footfall levels are relatively stable from morning through to evening, with a peak seen in the afternoon on a weekday.

Figure 69: Ore Village Local Centre, Time of Day Footfall



Source: MSCI

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253. In summary, Ore Village is a strong, vital and viable local centre that has a good mix of uses within it. For its size, it has a great provision of food stores and national multiples, although these multiples are balanced out by a healthy provision of independent operators.
254. The vacant, former car sales site presents itself as an opportunity area for potential placemaking, redevelopment and further strengthening of the centre's vitality.