Hastings Retail Study

Prepared on behalf of Hastings Borough Council

March 2006

Main Study

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Contents

Appendix 1: Policy Background

Executive Summary

1) This retail capacity study has been prepared by Knight Frank in response to Hastings Borough Council's brief to assess the future shopping needs and retail capacity of the Borough. The completed report will underpin the retail policies contained in the forthcoming Local Development Framework and in addition form the basis for assessing retail development proposals over the Plan period. A background paper provides recommendations in respect of St Leonards Town Centre, Hastings Old Town, Bohemia, Silverhill and Ore Village which were the subject of Focus Group meetings.

2) Planning policy at a national, regional and local level will underpin any consideration of future retail trends. The principal relevant policy documents which inform this report are PPS 6 *'Planning for Town Centres',* PPG 13 *'Transport',* RPG 9 *'South East',* the 2005 Draft South East Plan, the 1999 East Sussex and Brighton and Hove Structure Plan and the 2004 Hastings Local Plan.

Analysis Inputs

Catchment Areas

3) The retail capacity of Hastings has been assessed using a number of bespoke data inputs. The catchment areas used to inform the analysis are based upon adjusted 30 minute off-peak drive time calculations originating from Hastings town centre which have been divided into 6 'Expenditure Zones' namely, Hastings East, Hastings West, Bexhill, Rural North, Rural East and Rural West.

Population

4) Base demographic data used in the report was provided by CACI and derived from the 2001 Census. At that time the total population of the study area was 174,827 with 48% of those living in the Hastings East and West expenditure zones.

5) Future population forecasts have been calculated using East Sussex County Council projections based on housing completion estimates to 2021 specially prepared by Rother District and Hastings Borough Councils. Four population projection bases have been used, namely a best estimate of dwelling completions up to 2021, a low projection (best estimate minus 20%), a high projection (best estimate plus 20%) and a projection based on no new housing post 2004. The best estimate projection shows a total increase in population of 13,804 in the 6 expenditure zones from 2001 to 2021. The figure for the low projection (minus 20%) is + 8,942, for the high projection (plus 20%) is + 18,640 and for no development post 2004 there is a fall in population of – 7,514.

Convenience and Comparison Expenditure

6) Consumer retail data for the 6 expenditure zones have been obtained from Experian Ltd in 2003 prices. In terms of convenience goods expenditure per capita, Rural East ranked highest at £1729 per annum with the lowest being Hastings West at £1543. For comparison goods expenditure per capita the area with the highest spending was Rural East with £3214 and the lowest Hastings West at £2777.

7) Convenience and comparison goods expenditure forecasts have been projected for 2005, the base year and 2011, 2016 and 2021 using Experian ultra long term growth rates. Convenience goods spending increases slowly over time at 0.7% per annum and the main dynamic for change is population growth. Using Best Estimate projections, convenience goods expenditure in the Study Area is forecast to grow as follows:-

2005	£294.294m
2011	£317.106m
2016	£334.155m
2021	£349.136m

8) Comparison goods spending grows at a much faster rate than convenience spending, at 4.3% per annum. Total comparison goods expenditure in the Study Area is forecast to grow as follows:-

2005	£581.829m
2011	£773.999m
2016	£972.270m
2021	£1,211.060m

9) Bulky goods form a significant element of total comparison goods spending. Experian growth rates at 3.9% per annum have been used to calculate bulky goods expenditure forecasts. Total bulky goods expenditure in the Study Area – included in the above comparison figures - is forecast to grow as follows:-

2005	£196.083m
2011	£254.998m
2016	£314.189m
2021	£389.950m

Other Expenditure

10) Leisure spending is not retail spending but is an important consideration in the context of town centre planning and Hastings' specific role as a tourist destination. Experian expenditure estimates for leisure spending (recreation, culture, restaurants, accommodation, hair dressing etc), which relate to household spending in the Study Area, have been projected forward as follows (at a growth rate 2.5% per annum):-

2005	£308.777m
2011	£370.019m
2016	£425.891m
2021	£486.103m

11) This includes all leisure expenditure, including holidays abroad, but is indicative of spending levels which could have a noticeable impact upon both the demand for retail premises and the performance of retail service businesses.

12) Visitor spending has been quantified from the on-street survey results commissioned as part of this report. 78% of first time visitors to Hastings who were questioned intended to undertake an element of shopping during their visit spending on average £34.40 per day. Our survey did not provide a means of estimating overall numbers of visitors so it is not possible to get an accurate view of total annual visitor spending.

Floorspace

13) Retail floorspace figures have been derived from an analysis of the 2005 Rating Revaluation and upon acquired data from Goad. Knight Frank's own analysis as illustrated below:

Area	Number of Units	Gross Floorspace (sq m)	Net Floorspace (sq m)
Town Centre	427	109611	66618
St Leonards	245	31027	18131
Old Town	171	13108	7933
Bohemia	98	11403	6169
Ore	47	8560	4511
Silverhill	59	7748	4360
Other Local Centres	86	7732	4902
Off Centre Units	8	25239	17890
Ravenside Retail Park	11	15509	14229
TOTAL	**1152**	**229937**	**144743**

14) Ravenside Retail Park, which lies outside the Borough, is included because of the role it plays in meeting the needs of Hastings residents for bulky goods.

15) Future retail floorspace commitments both in and around Hastings have also been taken into account. Some 10817 sq m gross floorspace either has planning permission or is going through the planning process as of April 2005. Planning commitments and new space awaiting occupation represent some 5.8% of total floorspace with an additional 3.9% in the pipeline. The most significant developments in competing centres are likely to be the Eastbourne Town Centre extension (26,600 sq m gross floorspace) and the Ashford County Square extension (44,872 sq m gross floorspace). Such proposals provide a challenge to Hastings which will need to respond to these changes. Our analysis assumes that Hastings retains its market share over time.

Turnover and Market Share

16) The turnover of major retailers has been estimated by applying national average turnover floorspace ratios (sales densities) to their identified net sales area. We have estimated the turnover of local businesses based on known expenditure levels and the market share information from the Survey.

17) The telephone survey commissioned by Knight Frank and that Council has been used to assess Hastings' market share across all of the retail sectors. Within the wider Study Area, Hastings has some 53% of convenience and 36% of comparison goods trade. Ravenside Retail Park accounts for 17% of the Study Area's comparison goods trade, reflecting its dominant position in the bulky goods sector. Hastings' ability to maintain its market share will depend upon retail innovation by existing retailers, the ability to provide new sites for retail floorspace demand and the activities of competing centres such as Eastbourne, Ashford and Tunbridge Wells.

Retail Capacity Analysis

Convenience Goods

18) Convenience goods are everyday essential items, including food, drinks, newspapers, magazines and confectionery. At 2005, convenience goods expenditure in Hastings is substantially above the convenience turnover required by Hastings' retailers, suggesting that a number of operators are currently over trading. The Best Estimate projection model generates a requirement for additional convenience floorspace at each date as follows (their turnover per floorspace levels are higher than the national average):-

2006	+2222 sq m
2011	+ 467 sq m
2016	+ 173 sq m
2021	- 2 sq m

19) Growth in convenience goods expenditure in real terms is relatively low and this, combined with slowing population dynamic and our assumptions that turnover/floorspace levels increase in real terms, means that by 2021 there is no net requirement for convenience goods floorspace. At present Hastings has a substantial inflow of convenience expenditure from Rural North and Rural East resulting in substantial over-trading in this sector. This identified capacity for additional convenience floorspace may be partly addressed by the Morrison and Tesco extensions.

Comparison Goods

20) Comparison goods are not purchased on a frequent basis. They include clothing, footwear, household and recreational goods. This sector is considered in terms of both bulky and non-bulky comparison goods. The bulky goods sector (electricals, DIY, furniture etc) is currently broadly in balance. The Best Estimate population projection) shows some small capacity for bulky goods floorspace at present which is likely to be absorbed by the new Wickes store at Ravenside. The estimated capacity is as follows:-

2006	+ 55 sq m
2011	+2826 sq m
2016	+2740 sq m
2021	+2633 sq m

21) The non bulky goods sector (footwear, books, toys, sports etc) displays a small net over provision of floorspace at 2005 and a temporary over supply of floorspace in 2006 whilst developments including extensions at Priory Meadow and Tesco / Morrisons come on stream but the rapid growth in spending will provide significant capacity for additional floorspace for non bulky comparison goods spending as follows:-.

2006	-6405 sq m
2011	+7064 sq m
2016	+6825 sq m
2021	+8181 sq m

22) This is a significant level of capacity and the report identifies a number of options which are consistent with Government advice in PPS6 for the council to consider. In the town centre these include:

- Priory Quarter
- Pelham Place
- Queens Road/Morrisons/adjacent land

Further sites are identified in the background document on local centres in:

- St Leonards (3 no)
- Old Town (1 no)
- Bohemia (2 no)
- Silverhill (2 no)

Job Creation

23) Consideration has been given to the employment consequences of future retail provision. In general terms, convenience businesses require a higher number of staff for any given amount of floorspace than comparison goods businesses due to both wider product ranges and higher turnover of stock. Job creation figures of one new job per 20 sq m of convenience floorspace, 1 new job per 35 sq m for comparison floorspace and 1 new job per 60 sq m for bulky goods floorspace have been used in the report based figures produced by the ODPM. Tesco figures have been used for their Church Wood Drive extension proposal. The pipeline permissions and proposals of which we are aware have the potential to create 383 additional jobs in Hastings, 42% of which are likely to be full-time and 58% part-time in nature. On this basis the total employment resulting from the implementation of proposals in the study period would be over 1300 jobs. This excludes retail service jobs – restaurants, banks, building societies - which would accompany the growth in retailing.

The Retail Hierarchy

24) The report considers the hierarchy of shopping centres within Hastings against the typologies explained in Annex A of PPS6: *Planning for Town Centres.* Three types of centre are identified in Hastings, as follows:

Town Centre	Hastings Town Centre
District Centres	St Leonards Town Centre Ore Village
Local Centres	The Old Town Bohemia Silverhill

25) Focus group meetings were held in St Leonards, the Old Town, Bohemia, Ore and Silverhill and focus group notes are available in a separate background document.

The Town Centre

Role

26) Hastings is a sub-regional shopping centre which directly competes with Eastbourne to the west, Tunbridge Wells to the north and Ashford to the north east. It ranks third amongst these centres in terms of floorspace, fourth in relation to population and second for retailer requirements.

Shopping Patterns

27) A telephone survey of 1000 households was conducted based upon the 6 expenditure zones previously identified. Respondents were asked to identify which centre or retail park they normally used for a variety of shopping trips. Hastings Town Centre was the pre-eminent centre within the study area for clothes and shoes, furniture and carpets, small household goods and books, toys and sports. It is the principal shopping centre used by respondents from Hastings East and West and also attracts high levels of shoppers from Rural East and to a lesser extent Rural North. The Bexhill and Rural West expenditure zones were less supportive of Hastings town centre where Eastbourne Town Centre and to a lesser degree, Bexhill Town Centre have good market share.

Retail Composition

28) Hastings has a good balance of floorspace in the main retail sectors which includes a range of convenience and comparison stores. The principal deficiencies compared with the UK average are in the clothing and footwear categories. The Town Centre has a growing number of support services but is under-represented in terms of restaurants and financial services and over-represented in estate agents.

Household Survey Attitudes

29) The study considers the attitudes of residents in the study area to Hastings Town Centre obtained from the telephone survey. With the exception of Rural West, Hastings Town Centre has high satisfaction scores throughout the study area. Hastings East, which has the highest number of town centre shoppers, has relatively low scores whereas Hastings West has the highest. The least favoured aspects of the centre were cited as car parking, public transport and the evening economy whilst the most favoured was the opening hours of shops.

30) In terms of suggested improvements, general matters such as security, parking, street cleanliness and public transport were mentioned more than matters relating to shopping improvements though the individual reason with the most mentions was ‘an improved range of shops’ or ‘better shops’.

31) Perceptions of households in the study area of public safety in Hastings town centre were higher for Hastings East and West, where usage rates are highest, and generally diminished where usage rates were lower. Perceptions of safety at night were uniformly low, again diminishing in areas with lower usage.

On-Street Survey Attitudes

32) An on-street survey was conducted to elicit the views of town centre users. Their approval ratings were substantially higher than telephone survey householders in the study area and shopping was the overwhelming reason for their visit (82%). When asked how they had reached the centre almost half of respondents had arrived by car with Priory Meadow the most frequently used car park. Over a quarter had walked to the town centre and almost 1/5th had used a bus.

33) Town centre users were more forward in wanting to see an improved range of shops than were householders in the study area (77%), with better car parking being mentioned by 19% as the second most important town centre improvement. The types of improvements to the range of shops sought were more variety/more clothes shops/better quality shops/more independent shops and more shoe shops.

34) Perceptions of safety both during the day and at night were much higher amongst town centre users than was the case with householders. There was a substantial difference between perceptions of safety at night which was considered a much less safe time to visit.

Attitudes Summary

35) Hastings town centre has relatively high levels of satisfaction amongst households in the study area though satisfaction levels were higher, as might be expected, by town centre users. The key issues illustrated by both groups questioned can be summarised as the need to improve perceptions of safety in the town centre. Good, accessible, available and safe car parking is an important component in attracting shoppers to the centre. Respondents want to see a better range of shops coupled with higher quality outlets especially in the fashion and electrical goods sectors.

Key Stakeholders' Views

36) A number of key stakeholders were consulted as part of the study who expressed a variety of shared views concerning Hastings town centre. There exists a consensus that Priory Meadow has a central role to play in the town centre although there is limited capacity to intensify its retail floorspace. The town centre is seen to be relatively weak in terms of fashion and footwear. In line with opinions expressed elsewhere there exists the view that the provision of parking is a central issue which should be incorporated into any future development within the centre, though clearly in the interests of sustainable development, accessibility by non-car modes needs to be improved.

Development Opportunity Sites

37) The compact and densely developed nature of the Town Centre and the Central Shopping Area, with the existing road layouts and conservation area designations that apply to much of it, mean that retail development is likely to be limited to a relatively small number of individual retail sites that may become available. The Sea Space projects provide the main exception to this. Priory Quarter in particular may provide an opportunity to accommodate more retail development incorporating two large sites, the Priory Street Car Park and the ESK site on Cambridge Road and other smaller sites. The landform may enable the use of site levels to provide lower level parking and a mix of non-retail uses could be provided above the retail floorspace. Elsewhere in the town centre, the proximity of residential development to the main retail areas can restrict the potential to intensify retail activities and landform is a further constraint.

38) In the longer term, the Morrisons supermarket site and adjacent council owned land provides an opportunity for a large footplate retail and mixed use development. This could be tied in with the refurbishment of Queens Road.

1.0 Main Report Introduction

1.1 This report has been prepared by Knight Frank in response to the Council's brief setting out their requirements for a study of future shopping needs and retail capacity of the Borough. It is intended that the work will underpin the consideration of retail policies in the Local Development Framework (LDF) which is to be prepared under the new planning legislation. It will also form the basis for assessing retail development proposals over the Plan period. It is not the function of this report to present new policy but to describe and analyse current retail patterns and to project future shopping needs.

1.2 A separate background report considers 5 secondary shopping areas of Hastings Old Town, Bohemia, Silverhill, Ore Village and St Leonards town centre, setting out their roles, future needs and wider planning and regeneration issues.

1.3 The report is presented in 4 parts. Part 1 presents the context within which the report has been produced. This includes a market overview and a short summary of the policy context. A more detailed consideration of policy is included in Appendix 1 to this report. Part 2 considers the inputs to the analysis, describing data sources and assumptions and presenting data relevant to the assessment. Part 3 is a shorter section which presents the principal retail capacity analysis and identifies the capacity for additional retail floorspace. It also deals with potential retail job creation. Part 4 examines in detail the town centre, exploring perceptions of it, identifying its strengths and weaknesses and presenting options for its future growth. Our local centre reports are incorporated into a separate background document.

1.4 This retail capacity study uses an established methodology for identifying the need for retail floorspace arising from the dynamics of population growth and real expenditure growth. It also makes allowance for existing retailers to improve their turnover in real terms. These assumptions are based on observed national trends. As new floorspace is only justified in terms of expenditure growth, the floorspace capacities identified will have a neutral effect on existing traders. It is not justified in terms of trade diversion from any existing retailers and therefore its impacts on other retail centres are benign.

1.5 In identifying the capacity for new floorspace, it is then a matter of policy where that new floorspace is located. National planning policy guidance apply a sequential approach which particularly promotes growth in Town Centres. This report considers appropriate options for growth in the Town Centre, whilst potential sites within the other centres are considered in the Background Document Report.

Part 1

Contexts

Part 1: Contexts

1.0 Introduction

1.1 The Hastings Retail Capacity Study has a particularly long time perspective - from 2005 to 2021. The retail sector is one characterised by innovation and change and there will no doubt some adjustments during this period. In order to provide a robust analysis we have used ultra long term growth rates for expenditure growth and have tested a range of growth assumptions from "no new development post-2004" to "best estimate plus 20% growth". This short section gives a market overview and is very much the retail perspective from 2005. This is very much a view of the first few years of the project period and it is likely that the retail investment market will change during this period.

1.2 The Market Overview is followed by a short summary of the planning policy context. A more detailed consideration is given in Appendix 1 to this report.

2.0 Market Overview

2.1 The UK retail sector has been characterised by falling prices (in real terms) since the late 1990s. Sales volumes have generally more than kept up with falling prices but in recent months retail spending growth has been sluggish and consumer confidence is reported to be wavering. Interest rate rises and a slowing down of house price inflation are held to be the main contributing factors. Concerns about poor retail performance amongst other factors may now support modest reductions in interest rates, which could help stabilise the retail sector.

2.2 Growth in household spending has been a significant factor supporting the growth of the UK economy in recent years but current forecasts indicate a weakening in the consumer sector.

2.3 The weakening trading environment has led this year to profit warnings from a number of High Street retailers including Marks & Spencer, Dixons, Jessops, Morrisons, Boots, Ottakars, Peacocks, Whittards of Chelsea, Next and Woolworths. All but one of these has a presence in Hastings. During the first quarter of 2005 there have been a significant number of retailers going into receivership. These include Allders, Index (the Littlewoods catalogue shop), Pilot, Gadget Shop, Eiseneger, Ciro Citterio, Cromwell's Madhouse, Morada Interiors and Virginwear. The resilience of the retail sector is reflected in the fact that many of the properties released through receivership were taken in blocks by other, expanding, retail groups - eg. Argos took 33 of the Index stores. Some consolidation is taking place in the market with investment companies buying up niche retail chains. An example is Icelandic Group Bauger which has acquired, and is expanding, the Karen Millen, Whistles, Coast and Oasis fashion outlets.

2.4 Despite current jitters amongst some retailers and the immediate trends in retail spending, retail property has outperformed other property market sectors consistently for the last 3 years and is expected to do so again in 2005. There is some variability within the retail property sector with High Street shop rental values averaging only 1.7% per annum (growth outside central London tends to be higher), in-town shopping centres at 3.5% per annum and retail warehouse rents at 6.0% per annum. The latter reflects the perceived restriction on supply resulting from current planning policies. The rates are forecast to reduce in the next 2-3 years but the sectoral disparities will remain.

Retailer Trends

2.5 In response to market conditions companies such as Marks & Spencer and Boots have been disposing of property assets through sales and leaseback proposals. The relative performance of retail property assets noted above can make this an attractive proposition for investors.

2.6 The main supermarket operators, and particularly Tesco and Asda, have sought to respond to market change by expanding their comparison goods offer, particularly into clothing and electrical goods. This trend has certainly been demonstrated in Hastings with the proposed composition of uses in the proposed extension of Tesco’s Church Wood Drive store.

2.7 Many retailers are continuing to express a preference for out-of-town sites - Marks & Spencer recently announced a switch in emphasis from its High Street stores - but planning policy clearly places a limit on this. Elsewhere, Currys have announced a policy of concentrating their stores at retail warehouse parks restricted by condition to bulky goods rather than those with more open A1 permissions. This would lower their cost base and provide opportunities for firms like Marks & Spencer. Given the fact that the major retail park serving the Hastings area lies in Rother District Council's area, Hastings may have to rely on that Council to resist changes which permit more non-bulky goods to be sold, where these changes are subject to control.

2.8 In response to restrictive planning policy, many retailers are looking at more intensive use of sites which hitherto may have incorporated single storey retail units and ground level parking. Supermarket developers are more likely to consider mixed use schemes with upper floor uses above retail (typically leisure and/or residential) and multi-storey parking on appropriate sites. One of the key requirements, where the site is in existing use, is the maintenance of trading operations during the redevelopment. More intensive use of existing retail sites, where appropriate, can provide a means of meeting the need for additional floorspace.

Internet Shopping

2.9 The recent rapid growth in internet shopping, or more specifically ‘electronic commerce’, is a phenomenon which may have a significant impact on retail trends. Although the internet provides a contemporary way of shopping and retailing, with the majority of large retailers trading from their own websites, the question remains as to whether internet based shopping will be seen as a viable alternative to high street shopping or whether its impact will be more limited.

2.10 Research undertaken by Barclaycard indicates that the growth in internet shopping shows no sign of slowing, growing by 90% a year in the UK. This growth has been further encouraged by the parallel rise in personal computer ownership and government sponsored programmes to connect the population to the web. Barclaycard estimate that the volume of online shopping in 2005 will reach £7 billion or 4% of all UK retail spend.

2.11 This is broadly in line with the findings of our survey and this level of internet trading is included in our analysis. The extent to which internet shopping grows beyond that rate, and potentially impacts upon overall retail spending levels and growth rates, is a matter for more detail national research over the coming years.

The Leisure Sector

2.12 The leisure sector has grown substantially in the past 10 years, growing by 30% since 1993. It includes items such as cinema, health and fitness, ten pin bowling, casinos, bingo halls and amusements, hotels, restaurants, pubs, bars, night clubs, sports clubs and holiday camps. Clearly, many of these are town centre functions and can compete with retail uses for premises and development sites. The growth of this sector, and in particular its manifestation as the major component of "the evening economy", has considerably added to the vitality of shopping centres. "Eating out" spending grew in real terms by 2% in 2004 and all retail centres within Hastings seem to have experienced a growth in food and drink establishments. This trend looks set to continue, though the implementation of the Licensing Act 2003, proposals to ban smoking and measures to curb binge drinking could affect that sector of the leisure market.

Conclusion

2.13 At 2005 therefore the outlook for the retail sector is uncertain though, in spite of the perceived current weakness in consumer spending, there is strong demand in the retail investment market. This reflects the state of the equity market which makes the level of returns from well advised retail investments more acceptable. Many investors have made healthy profits over the last 5 years and appear content to ride out current market jitters.

2.14 As far as Hastings is concerned, occupier demand appears buoyant at present and the new owners of Priory Meadow are clearly investing in their new asset. The regeneration projects being put forward by SeaSpace do not have retail as a primary focus but will include some retail units which will extend the range of premises available for new occupiers. The improvements in the range of eating and drinking facilities have been significant in Hastings. Much of this is funded by individuals and smaller investors who are not able to withstand long periods of adverse trading conditions, as the portfolio investors can. The success of these will depend on continued growth in that element of leisure spending which appears to be faring better than retail spending.

3.0 Policy Context

PPS6: Planning for Town Centres

3.1 Planning Policy Statement 6 (PPS 6) was published in 2005 and considers planning policy issues associated with town centres and the primary uses contained within such centres.

3.2 The principal guidance contained within PPS 6 aims to achieve through Local Authorities:

- the promotion of viable and vital town centres;
- the concentration of development within existing town centres;
- the selection of appropriate centres which have the ability to accommodate such growth;
- the improvement / intensification of existing land and buildings which currently exist within that centre;
- the identification of sites within existing centres that may become available for development;
- the use of the sequential approach to identify and prioritise development sites;
- the promotion of a diversity of uses within the centre thus sustaining / promoting its vitality and viability;

PPG 13: Transport

3.3 PPG13 ‘was published in 2002. In order to achieve its objectives the guidance states that when Local Authorities are preparing their development plans they should aim to achieve a variety of specific aims including:

- focusing major generators of travel demand in city, town and district centres;
- locating day to day facilities such as convenience shops close to their clientele;

- ensuring that development comprising jobs, shopping, leisure and services offers a choice of access by public transport, walking and cycling;
- using parking policies to promote sustainable transport choices thus reducing reliance on the car for work and other journeys.

Regional Policy Guidance

3.4 The relevant Regional Policy Guidance (RPG) for Hastings is RPG 9 entitled ‘Regional Planning Guidance for the South East’ adopted March 2001.

3.5 From Para 5.12 RPG 9 adopts a specific retail focus in relation to ensuring the vitality and viability of existing town and local centres. It acknowledges that a combination of economic recession and the diversion of investment to out-of-centre shopping locations has led to a strategic need to focus future investment and development in existing town centre locations. In order to bring about such a change in focus the region’s existing network of larger town centres should be the focus for major retail, leisure and office developments, in order to support an urban renaissance, promote social exclusion and encourage more sustainable patterns of development.

3.6 To achieve such an aim Local Authorities within the process of preparing their Development Plans should assess the need for additional retail within their area, identify which town and district centres should be the preferred locations for growth and apply the sequential test as outlined in PPS 6 to identify sites for retail, leisure and office development.

Draft South East Plan 2005

3.7 The South East Plan is intended to replace Regional Planning Guidance 9 (RPG 9) as the South East’s Regional Spatial Strategy (RSS) in 2006.

3.8 New development and redevelopment in town centres should be guided by the following considerations:

(i) The proportion of total retail expenditure accommodated within the town centres contained within the Regional Network should be greater than in any of the other centres;

(ii) The town centres in the Regional Network should be the prime focus for large scale leisure, office and cultural developments;

(iii) Local Authorities should ensure that centres are supported and enhanced and that the scale and nature of any new development in a centre is appropriate, and;

(iv) Local Authorities should identify and develop strategies for smaller centres to meet needs for quality local shopping, local businesses and appropriate leisure and cultural developments in partnership with other agencies.

East Sussex and Brighton and Hove Structure Plan 1999

3.9 The East Sussex and Brighton and Hove Structure Plan was adopted in 1999. In specific relation to town centres and retailing a strategy of regeneration of towns through integrated measures to improve economic, environmental and social well-being which includes transport improvements to provide better access to facilities by means other than the private car has been proscribed. Attention should also be focused upon the development and enhancement of town centre environments as places to live, work, shop, visit and access services.

3.10 Chapter 8 of the Structure Plan considers retail policies with the principal aims being to:

- safeguard the vitality and viability of existing shopping centres;
- allowing centres to evolve in response to the changing needs of consumers and retailers;
- make provisions for new forms of retailing;
- promote town centres as the first and principal focus for development
- improve and redevelop existing, vacant and underused sites.

Hastings Local Plan 2004

3.11 The Hastings Local Plan was adopted in April 2004. Chapter 5C outlines the Council's retail policies for the Borough. There is an acknowledgment that the impact of out of town and out of centre shopping combined with strong competition from neighbouring centres such as Eastbourne, Tunbridge Wells and Brighton has had the cumulative effect of disadvantaging Hastings town centre in terms of retail provision and performance.

3.12 The Local Plan will aim to pursue a number of core principles with regard to retail including:

- prioritising actions which support Hastings town centre;
- encouraging a wide variety of land uses and activities in the town centre;
- seeking continuing investment in the town centre;
- resisting retail proposals which would threaten the viability and vitality of the centres;
- support district / local centres, and;
- promote actions which improve the environment, traffic management, safety and access in all the main centres.

3.13 Although the individual district, local and speciality centres are considered in greater detail in the Background Report it is important to briefly expand upon the Council perception of each of the centres unique retail roles:

1) St Leonards District / Speciality Centre: Though smaller it is similar in character to Hastings town centre in relation to office and business provision. It is designated as a speciality centre with a variety of restaurant uses and a concentration of antique shops in Norman Road.

2) Old Town Speciality / Local Centre: Viewed as a speciality centre with its unique collection of restaurants, antique shops, second-hand shops and tourist facilities.

3) Bohemia Local / Speciality Centre: Contains a selection of antique and second hand shops but has suffered from high vacancy levels, especially in the southern section of Bohemia road, where commercial uses have been gradually replaced by residential uses. Policy S3 explicitly attempts to retain the ground floor uses of properties on Bohemia Road for A1, A2 or A3 services.

4) Silverhill and Ore District Centres: These two district centres rely on a good range of local convenience stores and the specific presence of supermarkets.

Sea Space Five Point Plan 2003

3.14 Sea Space was established as a regeneration company in 2003 by the Hastings and Bexhill Task Force. The Sea Space Regeneration Plan, adopted by the Steering Group in 2003, is primarily focused upon five key areas, namely education, business, urban renaissance, broadband and transport. The combined impact of the Sea Space Regeneration Plan is expected to achieve a number of pre-identified aims including:

- Excellence in education led by a new university centre;
- 100,000 sq m of business and education space;
- 1,400 new homes through the Hastings Millennium Community Programme;
- Expanded business and employment opportunities;
- Better transport infrastructure, road, bus and rail;
- Wide adoption of broadband technology.

Part 2
Analysis Inputs

Part 2: Analysis Inputs

1.0 Introduction

1.1 In this section we consider all of the data inputs needed to assess the retail capacity of Hastings. We explain the derivation of data and the assumptions we have used.

2.0 Catchment Area

2.1 In defining the catchment area for this study it has been necessary to consider the nature of convenience and comparison shopping trips. Such trips are normally made within a limited distance and shoppers are clearly influenced by the proximity and nature of competing centres.

2.2 Taking into account competing centres, we believe that Hastings is likely to attract the majority of its shoppers from within 20-30 minutes' off-peak drive time of the town centre.

2.3 As a resort town, Hastings also attracts visitors from further afield and we comment later on in the report on the effects of this element of retail spending.

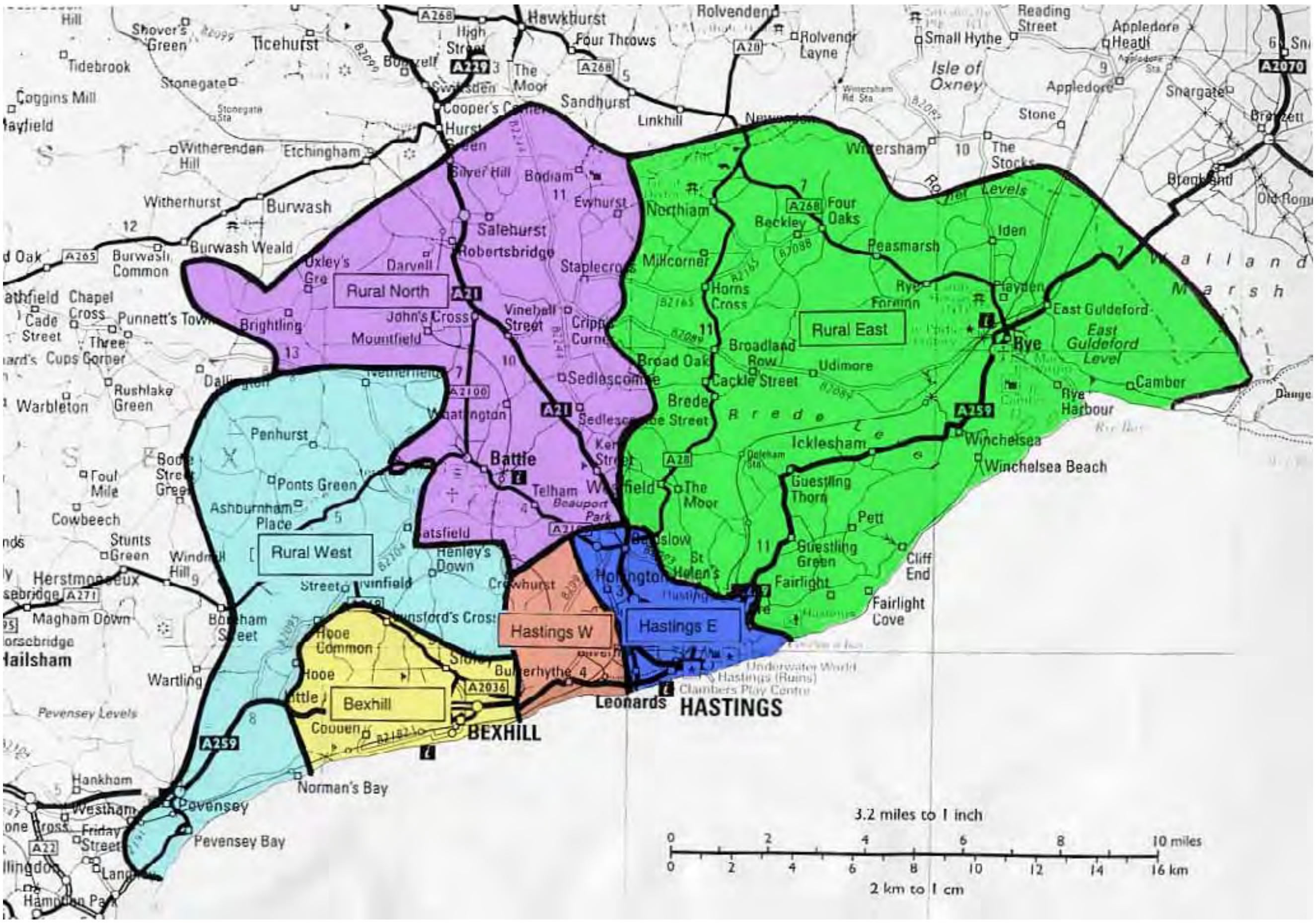
2.4 Having produced a 30 minute off-peak isochrone plan based upon Hastings town centre, this area has been broadly adjusted, extended to the east and north where alternative centres are more remote and "pulled-in" to the west, where Eastbourne would exert a significant influence. This area broadly relating to the 30 minute drive time has been divided into 5 functional areas, or Expenditure Zones and named as follows:

- Hastings East
- Hastings West
- Bexhill
- Rural North
- Rural East
- Rural West

2.5 These areas form the basic building blocks of the analysis, and the surveys which have been commissioned for the study present information for these areas.

2.6 These areas are shown on Plan 1 below:

Plan 1 – Expenditure Zones



3.0 Population

3.1 Demographic data for these areas has been commissioned from CACI. Table 1 below sets out the populations age structure by broad age cohorts for each expenditure zone as recorded at Census 2001 and provided by CACI. Hastings East had the largest population - 57,751 people - and its population age distribution is broadly similar to Hastings West, the third most populous area. Both zones have around 26% of their population aged under 20 and 18% of the population over 65. Bexhill has the second largest expenditure zone by population, with 40,560. This by contrast had less than 19% of its population aged under 20 and more than 35% aged over 65. One in five people in Bexhill is over 75 years old. Bexhill and Hastings East and West represent the two extremes of population age structure in these Expenditure Zones.

Table 1: Population 2001

		Male	Female	Total
Hastings East		**27,810**	**29,941**	**57,751**
Age Distribution	0-19			25.7%
	20-64			56.8%
	65-74			8.8%
	75+			8.7%
Hastings West		**12,514**	**14,039**	**26,553**
Age Distribution	0-19			26.6%
	20-64			54.9%
	65-74			8.0%
	75+			10.5%
Bexhill		**18,324**	**22,236**	**40,560**
Age Distribution	0-19			18.6%
	20-64			46.2%
	65-74			14.7%
	75+			20.5%
Rural East		**10,687**	**11,662**	**22,349**
Age Distribution	0-19			21.3%
	20-64			54.2%
	65-74			13.0%
	75+			11.5%
Rural North		**9,865**	**10,640**	**20,505**
Age Distribution	0-19			25.3%
	20-64			54.6%
	65-74			10.0%
	75+			10.1%
Rural West		**3,333**	**3,776**	**7,109**
Age Distribution	0-19			20.0%
	20-64			54.9%
	65-74			11.9%
	75+			13.2%
Total		**82,533**	**92,294**	**174,827**
Age Distribution	0-19			40,833 (23.4%)
	20-64			93,178 (53.3%)
	65-74			19,035 (10.9%)
	75+			21,781 (12.4%)
Total				**174,827**

Source: CACI

3.2 The rural zones include Rural East with 22,349 people and Rural North with 20,505 and Rural West, the smallest area with 7,109 people. Rural East and Rural West generally reflect a more elderly population/age structure with 20%-21% under 20 and 24%-25% over 65. Rural North by contrast has a population age structure more reflective of that for Hastings - 25% under 20 and 20% over 65. Clearly, the nature of this age structure will be reflected strongly in terms of the type of retail demand.

3.3 The total population in the retail study area (at 2001) was 174,827 of which 84,304 (48%) live in Hastings East and West.

Population Forecasts

3.4 Rather than use the demographic based forecasts provided by CACI, it has been agreed with HBC and East Sussex County Council that, for this analysis, housing based forecasts would be preferable. To this end, HBC and Rother District Council have provided best estimates of housing completions to 2021 and the County Council has used these as an input to its housing-led population forecasting model (the Chelmer Model).

3.5 In accordance with our instructions the study has been based upon four variant population projections which serve as a means of testing the sensitivity of the analysis to population fluctuations. These are:

i) a best estimate based upon Hastings Borough and Rother District Councils' best estimates of dwelling completions in the period up to 2021
ii) a low projection - best estimate minus 20%
iii) a high projection - best estimate plus 20%
iv) a no new housing post-2004 projection.

3.6 The projections are all based on census data for 2001 and the results are shown in Tables 2-5 below.

Table 2: Best Estimate Population Forecasts ESCC Model

Area	2001	2003	2005	2011	2016	2021	%
Hastings East	57,751	58,337	58,774	60,321	60,776	60,725	5.15
Hastings West	26,553	26,897	27,110	27,981	28,233	28,204	6.22
Bexhill	40,560	41,021	41,541	43,557	45,056	46,099	13.66
Rural East	22,349	22,121	22,558	23,377	23,890	24,248	8.50
Rural North	20,505	20,628	20,712	21,105	21,405	21,614	5.41
Rural West	7,109	7,062	7,188	7,451	7,623	7,741	8.89
Totals	**174,827**	**176,066**	**177,883**	**183,792**	**186,983**	**188,631**	**7.90**

Source: CACI/ESCC/KF

3.7 The results of this exercise, which we have disaggregated to the relevant expenditure zones, provide the population forecast estimates which are used in this analysis and are set out in Table 3 below.

3.8 The best estimate ESCC projection shows a 7.9% population increase from 174,827 in 2001 to more than 188,000 in 2021.

3.9 Population growth rates vary within the expenditure zones with 5.15% for Hastings East and 6.22% for Hastings West, and the rural zones ranging from 5.41% (Rural North) to 8.89% (Rural West). Bexhill, at 13.66%, has the highest growth rate of all the expenditure zones defined for this study.

Table 3: Low (Best Estimate Minus 20%) Population Forecast

Area	2001	2003	2005	2006	2011	2016	2021
Hastings East	57751	58075	58399	58561	59411	59576	59409
Hastings West	26553	26733	26913	27003	27476	27567	27475
Bexhill	40560	40920	41280	41460	42710	43742	44398
Rural East	22349	22474	22597	22658	23087	23441	23666
Rural North	20505	20577	20649	20685	20936	21143	21274
Rural West	7109	7150	7191	7212	7354	7471	7546
Totals	**174827**	**175929**	**177029**	**177579**	**180973**	**182940**	**183769**

Source: CACI/ESCC/KF

Table 4: High (Best Estimate Plus 20%) Population Forecast

Area	2001	2003	2005	2006	2011	2016	2021
Hastings East	57751	58382	59013	59328	61219	61968	62021
Hastings West	26553	26904	27254	27430	28480	28897	28926
Bexhill	40560	41191	41821	42137	44401	46368	47798
Rural East	22349	22565	22782	22890	23667	24342	24833
Rural North	20505	20631	20758	20821	21275	21669	21955
Rural West	7109	7181	7253	7289	7546	7770	7933
Totals	**174827**	**176854**	**178881**	**179894**	**186589**	**191014**	**193467**

Source: CACI/ESCC/KF

Table 5: No Development post-2004 Population Forecast

Area	2001	2003	2005	2006	2011	2016	2021
Hastings East	57751	57900	58050	58124	56893	55900	55302
Hastings West	26553	26636	26719	26761	26076	25525	25192
Bexhill	40560	40685	40810	40873	40082	39226	38325
Rural East	22349	22391	22435	22456	22185	21891	21582
Rural North	20505	20530	20555	20568	20409	20238	20057
Rural West	7109	7123	7137	7145	7055	6957	6855
Totals	**174827**	**175265**	**175706**	**175927**	**172699**	**169737**	**167313**

Source: CACI/ESCC/KF

3.10 In summary, the best estimate projection shows total growth of 13,804 in the six expenditure zones from 2001 to 2021, whilst the comparable figure for the low projection (minus 20%) is 8,942, for the high projection (plus 20%) is 18,640 and for the no development post-2004 is a fall in population of 7,514.

4.0 Expenditure

4.1 Consumer retail data for the defined expenditure zones has been acquired from Experian Ltd in their Retail Planner Report series. The information is presented for 2003 in 2003 prices. We have therefore used 2003 as the price base year for this study, though our base date for all other items is 2005, reflecting the reporting date and the timing of all the other survey inputs.

4.2 Table 6 shows a summary of the base data we have received on convenience goods expenditure from Experian (convenience goods being items such as food, drink, newspapers and non-durable household goods bought on a regular basis). This shows a range of levels of spending per capita, the lowest being Hastings West at £1543 per capita per annum rising to £1729 per capita per annum for Rural East. Total convenience expenditure in 2003 was highest in Hastings East at £93.164m and lowest in Rural West at £12.168m but the total spending in the study area on convenience goods was £287.167m.

Table 6: Convenience Expenditure 2003 (in 2003 prices)

Area	Population	£ capita	£m
Hastings East	58,337	1597	93.164
Hastings West	26,897	1543	41.502
Bexhill	41,021	1675	68.710
Rural East	22,121	1729	38.247
Rural North	20,628	1618	33.376
Rural West	7,062	1723	12.168

Source: Experian Retail Planner

4.3 Table 7 shows a summary of the basic aggregate data received from Experian on comparison goods expenditure (comparison goods are clothes, shoes and other personal items, durable household goods, books, toys and so forth which are not immediately consumed). The table shows a range of levels of comparison goods expenditure per capita ranging from £2777 per capita per annum in Hastings West to £3214 per capita per annum in Rural East. As above, the 2003 population data is as supplied by Experian and comparison goods spending was highest in Hastings East with £170.052m and lowest in Rural West at £22.640m. The total in all the expenditure zones for 2003 was £529.331.

Table 7: Comparison Expenditure 2003

Area	Population	£ capita	£m
Hastings East	58,337	2915	170.052
Hastings West	26,897	2777	74.692
Bexhill	41,021	3066	125.770
Rural East	22,121	3214	71.096
Rural North	20,628	3155	65.081
Rural West	7,062	3206	22.640

Source: Experian Retail Planner

Convenience Expenditure Forecasts

4.4 Using the ESCC figures as the basis for our population forecasts, the other dynamic for expenditure growth is the growth in real terms in spending per capita. Spending on convenience goods increases fairly slowly over time. The Experian ultra long term growth rate is 0.7% per annum. In view of the need in this study to provide forecasts to 2021 - a long time in terms of conventional forecasting of demographic and local economic data - it is prudent to use the ultra long term growth rates.

4.5 The results of using these data inputs and the best estimate population projections for 2005, 2006, 2011, 2016 and 2021 for convenience goods spending are presented in Tables 8-12.

4.6 Table 8 presents our estimate of current (2005) levels of convenience goods expenditure in the six expenditure zones in 2003 prices. Hastings East and West, which broadly correspond to the administration area of HBC, together will generate an estimated £137.582m of convenience goods spending in the year compared to £70.578m for Bexhill and £86.089m in the three rural expenditure zones.

Table 8: Convenience Expenditure Base Year 2005

Area	Population	£ capita	£m
Hastings East	58,774	1619	95.155
Hastings West	27,110	1565	42.427
Bexhill	41,541	1699	70.578
Rural East	22,558	1753	39.544
Rural North	20,712	1641	33.988
Rural West	7,188	1747	12.557

Source: Experian/Knight Frank

Table 9: Convenience Expenditure 2006

Area	Population	£ capita	£m
Hastings East	58,945	1631	96.139
Hastings West	27,216	1576	42.892
Bexhill	41,798	1710	71.475
Rural East	22,774	1766	40.219
Rural North	20,753	1652	34.284
Rural West	7,250	1759	12.753

Source: Experian/Knight Frank

Table 10: Convenience Expenditure 2011

Area	Population	£ capita	£m
Hastings East	60,321	1689	101.882
Hastings West	27,981	1632	45.665
Bexhill	43,557	1771	77.139
Rural East	23,377	1828	42.733
Rural North	21,105	1711	36.111
Rural West	7,451	1822	13.576

Source: Experian/Knight Frank

Table 11: Convenience Expenditure 2016

Area	Population	£ capita	£m
Hastings East	60,776	1749	106.297
Hastings West	28,233	1689	47.686
Bexhill	45,056	1834	82.633
Rural East	23,890	1893	45.224
Rural North	21,405	1772	37.930
Rural West	7,623	1887	14.385

Source: Experian/Knight Frank

Table 12: Convenience Expenditure 2021

Area	Population	£ capita	£m
Hastings East	60,725	1811	109.973
Hastings West	28,204	1749	49.329
Bexhill	46,099	1899	87.542
Rural East	24,248	1960	47.526
Rural North	21,614	1834	39.640
Rural West	7,741	1954	15.126

Source: Experian/Knight Frank

4.7 As stated in para 4.4 above, the growth in convenience goods expenditure in real terms is relatively slow and using the 2003 price base but projecting per capita spending and population numbers to 2021, Table 12 shows that Hastings East and West are forecast to have £159.302m convenience goods spending (an increase of £21.720m 2005-2021). Bexhill rises £16.964 to £87.542m in 2021 and the rural areas combined increase £16.203m to £102.292m. We consider the consequences of these levels of growth in terms of the demand for retail floor space over the study period in Section 6. It is appropriate at this stage to note that the conventional supermarket operators' increasing diversification from convenience goods to comparison goods - particularly small household goods but increasingly fashion and domestic appliances – enables such businesses to justify new floor space in the context of comparison goods expenditure growth which is considered below.

Comparison Expenditure Forecasts

4.8 The ESCC derived best estimate population forecasts have been used to forecast growth in comparison goods spending. As before, we have used the Experian ultra long term growth rates, but in the case of comparison goods, the growth rate is 4.3% per annum and 3.9% per annum for bulky goods. Whilst population growth was the main dynamic in convenience goods expenditure growth, growth in real terms in per capita spend is the main component of comparison goods expenditure growth.

4.9 The results of using these data inputs for 2005, 2006, 2011, 2016 and 2021 for comparison goods spending are presented in Tables 13 to 17.

4.10 Table 13 shows the estimated 2005 levels of comparison goods spending in the six expenditure zones expressed in 2003 prices.

Table 13: Comparison Expenditure 2005

Area	Population	£ capita	£m
Hastings East	58,774	3171	186.372
Hastings West	27,110	3021	81.899
Bexhill	41,541	3335	138.539
Rural East	22,558	3496	78.863
Rural North	20,712	3432	71.084
Rural West	7,188	3488	25.072

Source: Experian/Knight Frank

Table 14: Comparison Expenditure 2006

Area	Population	£ capita	£m
Hastings East	58,945	3307	194.931
Hastings West	27,216	3151	85.758
Bexhill	41,798	3479	145.415
Rural East	22,774	3647	83.057
Rural North	20,753	3580	74.296
Rural West	7,250	3638	26.376

Source: Experian/Knight Frank

Table 15: Comparison Expenditure 2011

Area	Population	£ capita	£m
Hastings East	60,321	4082	246.230
Hastings West	27,981	3889	108.818
Bexhill	43,557	4294	187.034
Rural East	23,377	4501	105.220
Rural North	21,105	4418	93.242
Rural West	7,451	4490	33.455

Source: Experian/Knight Frank

Table 16: Comparison Expenditure 2016

Area	Population	£ capita	£m
Hastings East	60,776	5038	306.189
Hastings West	28,233	4800	135.518
Bexhill	45,056	5300	238.797
Rural East	23,890	5556	132.733
Rural North	21,405	5454	116.743
Rural West	7,623	5542	42.247

Source: Experian/Knight Frank

Table 17: Comparison Expenditure 2021

Area	Population	£ capita	£m
Hastings East	60,725	6219	377.649
Hastings West	28,204	5925	167.109
Bexhill	46,099	6542	301.580
Rural East	24,248	6857	166.269
Rural North	21,614	6732	145.505
Rural West	7,741	6840	52.948

Source: Experian/Knight Frank

4.11 In the current year (2005) we estimate that comparison goods spending in Hastings East and West together will be some £268.271m. This compares with £138.539m for the Bexhill expenditure zone and £175.019m for the three rural expenditure zones.

4.12 In 2003 prices these figures are forecast to grow to £544.758m for Hastings East and West, an increase of £276.487m over the period 2005-2021; to £301.580m for Bexhill and to £364.722m for the rural areas. Whilst some of this increase will be reflected in improved sales densities, there is likely to be increasing scope for more comparison retail floor space in the study period which we consider in Section 6 below.

Bulky Goods Expenditure Forecasts

4.13 Bulky goods form a significant element of comparison goods spending. We consider this component below. Using the Experian ultra long term growth rates for bulky goods spending (3.9% per annum), Tables 18-22 present bulky goods spending for 2005, 2006, 2011, 2016 and 2021.

Table 18: Bulky Goods Expenditure 2005

Area	Population	£ capita	£m
Hastings East	58,774	1048	61.595
Hastings West	27,110	994	26.947
Bexhill	41,541	1117	46.401
Rural East	22,558	1233	27.814
Rural North	20,712	1186	24.564
Rural West	7,188	1219	8.762

Source: Experian/Knight Frank

Table 19: Bulky Goods Expenditure 2006

Area	Population	£ capita	£m
Hastings East	58,945	1089	64.191
Hastings West	27,216	1033	28.114
Bexhill	41,798	1161	48.527
Rural East	22,774	1281	29.173
Rural North	20,753	1233	25.588
Rural West	7,250	1266	9.179

Source: Experian/Knight Frank

Table 20: Bulky Goods Expenditure 2011

Area	Population	£ capita	£m
Hastings East	60,321	1319	79.563
Hastings West	27,981	1251	35.004
Bexhill	43,557	1406	61.241
Rural East	23,377	1551	36.258
Rural North	21,105	1493	31.510
Rural West	7,451	1532	11.422

Source: Experian/Knight Frank

Table 21: Bulky Goods Expenditure 2016

Area	Population	£ capita	£m
Hastings East	60,776	1597	97.059
Hastings West	28,233	1514	42.745
Bexhill	45,056	1702	76.685
Rural East	23,890	1878	44.865
Rural North	21,405	1807	38.679
Rural West	7,623	1857	14.156

Source: Experian/Knight Frank

Table 22: Bulky Goods Expenditure 2021

Area	Population	£ capita	£m
Hastings East	60,725	1933	117.381
Hastings West	28,204	1834	51.726
Bexhill	46,099	2061	95.010
Rural East	24,248	2274	55.140
Rural North	21,614	2188	47.291
Rural West	7,741	2248	17.402

Source: Experian/Knight Frank

4.14 In the current year (2005) we estimate bulky goods spending in Hastings East and West combined will be some £88.542m. This compares with £46.401m for the Bexhill expenditure zone and £61.140m for the three rural expenditure zones.

4.15 The figures are forecast to grow to £169.107m for Hastings East and West, an increase of £80.565, over the period 2005-2021; and to £95.010m for Bexhill and £119.883m for the rural areas.

Leisure Spending

4.16 The Experian expenditure data provides information in respect of spending on leisure services. This is not retail spending and does not form part of our capacity analysis. It is, however, important in the context of town centre planning to consider the scale of leisure spending and the Experian data shows interesting and subtle differences within the expenditure zones used in this study.

4.17 Table 23 below shows average per capita spending in various categories of leisure spending. These areas are:

- recreation and sport
- cultural spending
- games of chance
- restaurants and cafes
- accommodation services
- hairdressers/personal care

4.18 The restaurant/café and hairdresser/personal care categories are important because of the propensity for these uses to compete with retailers for retail units.

Table 23: Leisure Spending Characteristics 2003 (in 2003 prices) £/capita

Area	Recreation & Sport	Cultural	Games of Chance	Restaurants and Cafes	Accomm Services	Hairdressers etc	Total
Hastings East	101	258	135	1013	92	84	1683
Hastings West	98	250	133	977	86	79	1622
Bexhill	118	245	132	964	102	95	1656
Rural East	116	248	125	965	104	91	1649
Rural North	119	238	113	940	112	90	1613
Rural West	118	240	124	938	105	91	1617

Source: Experian

4.19 It is interesting to note that the total leisure expenditure per capita is highest for Hastings East (at £1,683 per annum), whereas this area tends to have lower retail spending per capita than Bexhill and the rural expenditure areas. This probably reflects the age and social characteristics of Hastings East's population.

4.20 In most cases the Hastings expenditure zones display different characteristics to the other expenditure zones as follows:

- recreation and sport - Hastings spending is lower
- cultural spending - Hastings spending is higher
- games of chance - Hastings (and Bexhill) spending is higher
- restaurants and cafes - Hastings spending is higher
- accommodation services - Hastings spending is lower
- hairdressers/personal care - Hastings spending is lower

4.21 Table 24 shows an estimate of the total leisure spending in the expenditure zones in 2003. Total leisure spending from residents of Hastings East and West sums to £141.807m, with figures of £67.930m for Bexhill and £81.168m for the rural zones.

Table 24: Leisure Spending 2003

Area	Population	£/Per Capita	Total
Hastings East	58,337	1,683	98.181
Hastings West	26,897	1,622	43.626
Bexhill	41,021	1,656	67.930
Rural East	22,121	1,649	36.477
Rural North	20,628	1,613	33.272
Rural West	7,062	1,617	11.419

Source: Experian/KF

4.22 Experian provide ultra long term growth rates for total leisure services spending (2.5% per annum). The following tables 25-29 present leisure services spending for 2005, 2006, 2011 and 2021.

Table 25: Leisure Services Expenditure 2005

Area	Population	£ capita	£m
Hastings East	58,774	1768	103.912
Hastings West	27,110	1704	46.195
Bexhill	41,541	1740	72.281
Rural East	22,558	1732	39.070
Rural North	20,712	1695	35.107
Rural West	7,188	1699	12.212

Source: Experian/Knight Frank

Table 26: Leisure Services Expenditure 2006

Area	Population	£ capita	£m
Hastings East	58,945	1812	106.498
Hastings West	27,216	1747	47.361
Bexhill	41,798	1783	74.068
Rural East	22,774	1776	40.063
Rural North	20,753	1737	35.977
Rural West	7,250	1741	12.514

Source: Experian/Knight Frank

Table 27: Leisure Services Expenditure 2011

Area	Population	£ capita	£m
Hastings East	60,321	2051	123.718
Hastings West	27,981	1976	55.290
Bexhill	43,557	2018	87.898
Rural East	23,377	2009	46.964
Rural North	21,105	1965	41.471
Rural West	7,451	1970	14.678

Source: Experian/Knight Frank

Table 28: Leisure Services Expenditure 2016

Area	Population	£ capita	£m
Hastings East	60,776	2320	141.000
Hastings West	28,233	2236	63.129
Bexhill	45,056	2283	102.863
Rural East	23,890	2273	54.302
Rural North	21,405	2224	47.605
Rural West	7,623	2229	16.992

Source: Experian/Knight Frank

Table 29: Leisure Services Expenditure 2021

Area	Population	£ capita	£m
Hastings East	60,725	2625	159.403
Hastings West	28,204	2530	71.356
Bexhill	46,099	2583	119.074
Rural East	24,248	2572	62.366
Rural North	21,614	2516	54.381
Rural West	7,741	2522	19.523

Source: Experian/Knight Frank

4.23 At the current year (2005) we estimate leisure services spending for Hastings East and West to be £150.107m. This compares with £72.281m for Bexhill and £86.389m for the three rural expenditure zones.

4.24 These figures are forecast to grow to £230.759m for Hastings East and West combined, an increase of £80.652m over the period 2005-2021; and to £119.074m for Bexhill and £136.270m for the rural areas.

4.25 Whilst it is not possible to analyse leisure services spending in the same way as retail spending, it is clear there will be substantial growth in spending, some of which will have an impact on the demand for retail premises. Restaurants/cafes, hairdressers and beauticians clearly compete with retailers directly for retail premises whilst other categories of leisure spending, for example spending on games of chance, which will include lottery spending, frequently goes though confectioners, tobacconists and newsagents and can directly support retail businesses.

Visitor Spending

4.26 As a resort town, Hastings does attract tourists and visitors from beyond it normal catchment area. These visitors, who are not accounted for in our normal assessment of expenditure, may visit the town centre and add to the expenditure which is normally derived by the town centre from its catchment area. We understand that the character of visitors has changed significantly over the years, with most visitors coming as daytrippers rather than staying for long periods in the resort.

4.27 Our on-street survey (see Part 4, paras 5.25 onward) included questions to seek to quantify visitor spending. The survey was undertaken in April and only 3% of the sample (9 interviewees) were visiting the town centre for the first time. Of these, one was a new resident and therefore should be excluded from this analysis. Around 78% of first-time visitors to Hastings town centre intended to undertake an element of shopping during their visit. According to the survey, their estimated daily spend would be around £34.50 which compares with an average of £21.80 for all visitors. From this information we are able to calculate the proportion of survey spend attributable to visitors and by considering the total spending in Hastings town centre over the year estimate that an additional £4.5m is spent by visitors in addition to that derived from our analysis of expenditure in the catchment area.

4.28 This figure needs to be considered with some caution as it is based on a very small sample size and the date of the survey means that it did not pick up on the larger number of summer visitors. On this latter point, however, the summer months do not typify visitor levels in Hastings throughout the year.

4.29 We conclude that visitor spending is important in Hastings but is not at a level which would substantially alter the conclusions of our retail capacity analysis.

5.0 Floorspace

5.1 Having assessed the population in the expenditure areas and per capita retail expenditure, the next stage in the analysis is to quantify the retail floor space in Hastings in order to establish a picture of the turnover retained in Hastings.

5.2 The Council does not have comprehensive records of retail units by floor area, though it does undertake retail surveys which identify retail uses by address. This information, with a latest survey date of 2004, was supplied to us and has been updated by KF to 2005.

5.3 We have commissioned Goad town centre reports for Hastings and Central St Leonards. Their summary data is as follows:

Table 30: Goad Town Centre Reports for Hastings Town Centre and St Leonards 2004- Summary

	Hastings Town Centre				Central St Leonards			
Retail Category	**No of Units**	**%**	**Sq M Floorspace**	**%**	**No of Units**	**%**	**Sq M Floorspace**	**%**
Convenience	26	6.9	7060	10.2	26	11.9	3720	13.9
Comparison	186	49.2	40600	58.6	88	40.2	12360	46.0
Service	118	31.2	12730	18.4	46	21.0	5480	20.4
Misc[1]	6	1.6	840	12.1	1	0.4	370	1.4
Vacant	42	11.1	8080	11.7	58	26.5	4920	18.3
Total	**378**	**100**	**69310**	**100**	**219**	**100**	**26850**	**100**

Source: Goad

5.4 In order to assess retail capacity it is necessary to identify all retail floorspace. To redress inconsistencies in data sources, Knight Frank has completed an analysis of the individual records of the 2005 Rating Revaluation. The results are set out below:

[1] Post office/careers and employment offices

Table 31: Hastings Floorspace 2005

Town Centre	Units	Gross Floorspace Sq m	Net Floorspace Sq m
Convenience	29	4271	2614
William Morrison	1	5016	3309
Comparison	173	61764	37247
Service uses	181	30369	12919
Vacant	43	8191	4606
Sub total	**427**	**109611**	**66618**
St Leonards			
Convenience	23	3553	1652
Comparison	97	13938	8598
Service uses	87	10112	5416
Vacant	38	3424	2365
Sub total	**245**	**31027**	**18131**
Old Town			
Convenience	9	646	387
Comparison	76	5681	3182
Service uses	71	6002	3867
Vacant	15	979	497
Sub total	**171**	**13108**	**7933**
Bohemia			
Convenience	6	802	319
Comparison	42	5875	3765
Service uses	29	2786	1286
Vacant	21	1940	799
Sub total	**98**	**11403**	**6169**
Ore			
Convenience	6	1306	845
Comparison	18	4401	2231
Service uses	19	1885	899
Vacant	4	968	536
Sub total	**47**	**8560**	**4511**

Silverhill			
Convenience	8	813	577
Comparison	16	2419	1331
Service uses	27	3046	1518
Vacant	8	1470	934
Sub total	**59**	**7748**	**4360**
Other Local Centres			
Convenience	14	1355	1079
Comparison	25	2152	1650
Service uses	42	3776	1888
Vacant	5	449	285
Sub total	**86**	**7732**	**4902**
Off Centre			
Conv: J Sainsbury	1	7045	4225
Lidl	1	1294	1100
Tesco	1	8593	4550
Comp: B&Q	1	1693	1655
Focus	1	2830	2698
Carpet Right	1	1168	1168
Harveys	1	713	591
MFI	1	1903	1903
Sub total	**8**	**25239**	**17890**
GRAND TOTAL	**1141**	**214428**	**130514**

Source: KF 2005 Rating Revaluation

5.5 This shows the primacy of the town centre which accommodates more than half of the town's net floorspace. The scale of the out-of-town provision is significant with more occupied floorspace than St Leonards, the second biggest centre. Further details of the composition of this floorspace are included in the technical appendices.

5.6 It is also relevant to consider Ravenside Retail Park which lies outside the borough in Bexhill, but has a substantial 'pull' of trade from Hastings and the wider catchment, mostly in the bulky goods sector. It contains:

Table 32: Ravenside Retail Park

		Gross Floorspace Sq M	Net Floorspace Sq m
Conv:	Tesco	3869	3406
	Iceland	1020	714
Comp:	Kitchen Studio	180	171
	Halfords	1040	988
	PC World	1570	1492
	Roseby	210	200
	Boots	970	922
	B&Q	3850	3658
	Currys	1780	1691
	Benson for Beds	150	143
	Comet	870	827
Sub total		**15509**	**14229**

Source: Goad Out of Town Report

Floorspace Pipeline

5.7 Having analysed the existing floor space it is necessary to consider outstanding planning commitments and developments in the pipeline. The following matters have been brought to our attention at April 2005.

Table 33: Floorspace Pipeline

	Status	Floorspace Gross	Floorspace Net	
			Convenience	Comparison
Morrisons, Queens St	PP granted	2137	600[2]	1110[2]
Tesco, Church Wood Drive[1]	Subject to call-in[2]	1603	400	1585
Priory Meadow extension	PP granted	1467	-	1025[2]
Sub Total	**PP granted**	**5707**	**1000**	**3720**
Station Plaza	Application	1394	-	1394
Pelham Square	Pre-application[3]	3716	-	3716
Totals		**10817**	**1000**	**8830**

[1] Note: Existing non-retail floor space to be converted to retail sales
[2] Application called-in by SoS following recommendation for approval by Borough Council and is now to be subject to public inquiry
[3] KF estimate
[4] Source: PMA/HBC/KF

5.8 We are aware of the potential for other Sea Space schemes to come forward with retail floor space but at this stage we do not believe designs have evolved to the point where retail potential can be quantified. In addition, there is a 3000 sq m (gross) store built, but not yet occupied, at Ravenside. This is expected to be occupied by Wickes and will provide 2850 sq m net floorspace. Planning commitments and new space awaiting occupation therefore represent some 5.8% of total floor space with a further 3.9% in the pipeline.

Floorspace Commitments in Competing Centres

5.9 The development pipeline in competing towns is an important consideration in determining the relative changes in the trade draws of Hastings and nearby towns. PMA identify the following schemes:

Table 34: Development Pipeline - Competing Centres

Town	Scheme	Status	Developer	Gross Floorspace Sq M	Net Retail Floorspace Sq M	Comments
Ashford	County Square Ext	PP granted	Catalyst Development	44872	20903	94000 sq ft pre-let to Debenhams; 2 multiple units and 14 unit shops
Brighton	New England Quarter	PP granted	J Sainsbury Railtrack Quoin Est	25641	2694	Foodstore and unit shops
	Brighton Centre	Pre-appcn	Brighton & Hove BC	-	-	Proposed ext to Brighton Centre; planning brief; to include retail units
Tunbridge Wells	Market Sq & Ely Court redevelopment	Allocation	-	-	10034	Possible redevelopment providing comparison floor space. At Local Plan Inquiry
	ABC Cinema site	PP granted at appeal	GLN Southern Holdings	7339	5295	Retail with nightclub and residential
Eastbourne	Town Centre	Draft Planning Brief	-	26,600		Gross figure after demolition; department store, 2-3 major stores and smaller units shops
	Langney Shopping Centre	PP granted	Frinton Securities Edinburgh Estates	17930	3995	Ext to provide 2 anchor retail/leisure units

Source: PMA/HBC

5.10 In terms of impact on existing retail patterns, the most significant developments in the pipeline are Eastbourne Town Centre Extension and the County Square Extension, Ashford. The retail extension around the Arndale Centre in Eastbourne is the subject of Supplementary Planning Guidance and will clearly provide an opportunity for Eastbourne to reinforce its strengths as a comparison goods centre. This will no doubt improve its market share in the Rural West and Bexhill expenditure zones, where Hastings has historically had difficulty in improving its market share. Hastings town centre will need to respond, particularly in the clothes and shoes sector where Eastbourne town centre currently has its highest market share amongst Hastings residents (11% and 12% for East and West respectively). The County Square Extension in Ashford may have an impact on Hastings' market share in comparison goods in the Rural East expenditure zone which, in view of Hastings' relatively high market share in those zones, could be rather more significant than the town centre extensions proposed in Eastbourne.

6.0 Turnover

6.1 The turnover of major retailers is estimated by applying their national average turnover floor space ratios (sales densities) to the identified net sales area. There is no national database for independent retailers and the application of national turnover rates may obscure regional and local differentials in costs and competition.

6.2 The telephone survey we have commissioned provides detailed information on household shopping patterns within the area. Consumers have told us where they shop for various goods - for convenience goods shopping they have indicated their 'main food' shop and the other shops used for top-up shopping - and have indicated the amount they spend. For a range of comparison goods they have indicated their preferred shopping centre and any other centres they use. This information can be used to calculate market share and worked back to provide a check on sales density turnover assumptions.

6.3 Our turnover estimates are as follows:

Table 35: Turnover Assumptions 2005

		£m
Town Centre	Convenience	39.541
	Comparison	133.214
St Leonards	Convenience	6.773
	Comparison	20.875
Old Town	Convenience	1.645
	Comparison	7.955
Bohemia	Convenience	1.196
	Comparison	7.906
Ore	Convenience	3.169
	Comparison	4.685
Silverhill	Convenience	2.164
	Comparison	2.795
Other Local Centres	Convenience	3.507
	Comparison	2.393
Off Centre	Convenience	72.259
	Comparison	28.467
Totals	**Convenience**	**130.254**
	Comparison	**208.290**

Source: KF/Retail Rankings

6.4 In projecting turnover we have had regard to Experian Retail Planner Briefing Note 2.2 entitled "*Estimating and Projecting Sales Densities*" published in October 2004. This suggests that sales densities in the convenience sector are likely to increase at a rate of 0.75% per annum in real terms and that comparison sector retail rates are likely to increase at a rate of 2.25% per annum. These growth rates have been applied to existing and new floorspace in this analysis.

7.0 Market Share Analysis

7.1 The telephone survey has been used to assess Hastings' market share across all of the retail sectors. Table 36 below shows the broad pattern of convenience goods market share of Hastings in terms of main and top-up convenience shopping.

Table 36: Shoppers Using Hastings Shops for Convenience Goods Purchases

		Hastings E %	Hastings W %	Bexhill %	Rural E %	Rural N %	Rural W %
Tesco,	Main	29	61	1	14	22	8
Hastings	Top-Up	7	17	0	4	3	1
Sainsbury,	Main	28	12	1	26	30	6
Hastings	Top-Up	9	8	1	6	10	3
Morrisons,	Main	23	3	0	11	0	0
Hastings	Top-Up	16	8	0	3	1	0
Other,	Main	8	8	0	1	1	0
Hastings	Top-Up	38	30	1	4	2	3
Local,	Main	0	0	0	0	0	0
Hastings	Top-Up	24	20	0	0	0	0
Total	**Main**	**88**	**84**	**2**	**52**	**53**	**14**
	Top-Up	**94**	**83**	**2**	**13**	**13**	**6**

Source: Telephone survey

7.2 Taking into account the amount of spending in Hastings, the following table summarises Hastings' market share of convenience goods spending

Table 37: Hastings Convenience Goods Market Share 2005

Hastings East	89.5%
Hastings West	83.8%
Bexhill	2.0%
Rural East	42.3%
Rural North	43.0%
Rural West	12.0%
Overall Market Share	52.7%

Source: Telephone survey

7.3 The "best estimate" expenditure figure for Hastings (East and West combined) in 2005 is £137.582m. The market share analysis derived from the telephone survey suggests total turnover for Hastings of £153.049m. This suggests a net inflow to the town which is the equivalent of about 11% of total Hastings expenditure. The outflows shown in Table 37 (10.5% Hastings East and 16.4% Hastings West) are more than compensated for by flows in, particularly from Rural East and Rural North. A similar analysis for comparison goods yields the following pattern.

Table 38: Hastings Comparison Goods Market Share 2005

	Hastings E %	Hastings W %	Bexhill %	Rural E %	Rural N %	Rural W %
Electrical Goods	37.14	49.58	6.64	33.58	22.76	4.89
Clothes & Shoes	49.09	51.23	18.09	50.76	28.62	12.32
Furniture & Carpets	47.11	49.63	15.14	32.36	21.39	4.14
Small Household Goods	60.56	54.63	12.55	40.06	23.57	14.44
DIY & Garden Products	56.75	40.22	7.75	38.77	24.93	6.84
Books, Toys & Sports	55.51	56.02	14.24	40.13	26.66	12.62
All Categories	47.92	50.26	12.50	39.30	24.77	8.45

Source: Telephone Survey

7.4 This table shows relatively high levels of market share for Hastings shops from the Hastings East and West expenditure zones and a much smaller market share from Bexhill and Rural West. We consider where people shop in Part 4, Section 3.0 below. The market share is particularly lower in terms of the DIY and electrical goods sectors, where the Ravenside Retail Park in Rother District clearly takes a considerable amount of Hastings' bulky goods trade. Bulky goods are considered separately in Section 7.6 below. In terms of Hastings' market share rates from the areas outside Hastings itself, the following sectors have the highest and lowest market shares:

Table 39: Hastings' Market Shares in the "other" Catchments

	Highest	Lowest
Bexhill	Clothes and shoes	Electrical goods
Rural East	Clothes and shoes	Furniture and carpets
Rural North	Clothes and shoes	Furniture and carpets
Rural West	Small household goods	Furniture and carpets

Source: Telephone Survey

7.5 The total market share for Hastings shops in 2005 is calculated as follows using the spending information from the telephone survey.

Table 40: Expenditure retained in Hastings 2005

	Convenience Goods £m	Comparison Goods £m
Hastings East	84.121	89.309
Hastings West	35.101	41.162
Bexhill	1.394	17.317
Rural East	16.507	30.993
Rural North	14.437	17.608
Rural West	1.489	2.119
Total	**153.049**	**198.509**

Source: KF

7.6 The bulky goods sector is a "subset" of the comparison sector. Table 38 shows that Hastings' market share levels for electrical goods, furniture and carpets and DIY, the categories that comprise the bulky goods "subset", are generally lower than for the other sectors.

Table 41: Hastings Bulky Goods Market Share 2005

Hastings East	44.1%
Hastings West	47.8%
Bexhill	9.6%
Rural East	34.4%
Rural North	22.9%
Rural West	5.1%
Overall Market Share	30.8%

Source: Telephone survey

Conclusions on Market Share

7.7 Within the wider catchment, Hastings has some 52% of convenience goods trade and around 34% of comparison goods trade. Its overall market share is lowest, at around 31%, in the bulky goods sector. The ability to maintain market share will depend upon the retail innovation of existing retailers and the ability to provide new sites for new retail floorspace that is acceptable to developers and supported by customers. Ability to maintain market share also depends upon the activities of other local authorities, retailers and developers in competing towns. In particular, the proposed extensions to Eastbourne town centre and at Ashford (set out in Table 34 above) will be designed to improve their expenditure retention and market share. In a heavily competitive retail market improvements are needed to maintain market share.

7.8 The assumptions on market share used in the Capacity Analysis which focuses in Part 4 of this Report reflect the maintenance of current market share. This means that in terms of convenience goods and non-bulky comparison goods, Hastings will remain the pre-eminent retail centre in the defined catchment. In respect of the bulky goods sector, Hastings will continue to maintain market share, but the existence of the Ravenside Retail Park, on the Bexhill side of the Borough boundary is acknowledged and this will continue to play a significant – and for the time being, growing role in the provision of bulky goods retailing in the defined catchment area. Maintaining market share in an era of growing per capita spending means meeting new challenges in identifying retail development sites – particularly for non-bulky comparison goods floorspace. The following analysis quantifies capacity to 2021.

Part 3
Retail Capacity Analysis

Part 3: Retail Capacity Analysis

1.0 Introduction

1.1 Having considered the data inputs to the study in Part 2 above, Part 3 presents the retail capacity analysis. It takes the data inputs, provides a short summary of each and presents the conclusions on retail capacity.

2.0 Population

2.1 Population was forecast using ESCC dwelling based models on four bases as follows:

- best estimate
- low (best -20%)
- high (best +20%)
- no new development post-2004

2.2 The results in summary were:

Table 42: Population Change in the Study Period

	2005-2011	2011-2021	2005-2021
Best	5909	4839	10748
Low	3944	2796	6740
High	7708	6878	14586
No devt post-2004	-3007	-5386	-8393

Source: ESCC/HBC/KF

2.3 Whilst these population models produce very different rates of growth, as might be expected, we note below that the rate of population growth is a relatively small component of expenditure growth. Growth in spending per capita in real terms is the more significant element.

3.0 Expenditure

3.1 Tables 8-17 in Part 2 show the total growth in convenience comparison and bulky goods spending in the six expenditure zones over the forecasting period to 2021 for each of the population projection types.

3.2 Expressed in constant 2003 prices, the results for all six expenditure zones can be summarised as follows:

Table 43: Expenditure Summary

	2005-2021 Expenditure Growth Summary (£m)			
	Best	**Low -20%**	**High +20%**	**No Devt**
Convenience	54.886	47.241	62.202	18.808
Comparison	629.231	600.714	657.017	499.036
Bulky Goods	187.867	178.879	196.592	146.739

Source: KF

3.3 This represents a substantial increase particularly in comparison goods. In this table, bulky goods spending forms a subset of comparison goods, which is presented here as a total figure incorporating bulky goods expenditure.

4.0 Market Share

4.1 The expenditure zones cover the area from which the bulk of Hastings' trade is drawn. The telephone survey undertaken by Synovate for this study shows that Hastings' market share for comparison goods spending within the zones was as follows:

Table 44: Market Share Summary (%)

	Hastings East	Hastings West	Bexhill	Rural East	Rural North	Rural West	Total
Comparison	51.61	51.92	13.41	39.04	26.28	8.89	35.92
Convenience	89.50	83.75	2.00	42.25	43.00	12.00	52.66

Source: Telephone Survey/KF

4.2 Hastings' market share in all expenditure zones (other than Bexhill) is greater for convenience goods than for comparison goods. In the comparison sector Hastings retains about 52% of the expenditure for the borough as a whole. The role of Ravenside Park just outside Hastings' borough boundary has a significant impact on the wider catchment. It is particularly dominant in the electrical goods sector as it has three major outlets selling electrical goods - PC World, Comet and Currys.

Table 45: Ravenside Park Market Share

	Hastings East	Hastings West	Bexhill	Rural East	Rural North	Rural West	Total
Comparison	18.2%	19.9%	20.8%	9.9%	10.1%	9.9%	16.6%

Source: Telephone Survey

5.0 Trade Retention

5.1 Our analysis of market share shows that at 2005 using best estimate projections, Hastings retains almost £156m of convenience goods trade and £209m of comparison goods trade. Market share is calculated by applying the results of the telephone survey to the retail expenditure figures provided by Experian.

6.0 Hastings Turnover

6.1 Our analysis of retail floorspace in Hastings is based upon rating records and we have calculated turnover using the UK Retail Rankings 2004, Verdict on Grocery Retailers 2004 and Knight Frank estimates calibrated using the market share information from the survey. The figures used for major retailers relate to company national average sales densities. We estimate that at 2005 total turnover for Hastings as a whole was as follows:

- Convenience goods: £130.254m
- Comparison goods: £208.290m

6.2 This more or less balances with the market share analysis for comparison goods (see para 7.5 in Section 2 above) but we believe that in the convenience sector there is a degree of over-trading - ie. companies actually trading above their national average sales densities. The outstanding unimplemented proposals for Tesco and Morrisons may reflect a situation where additional floorspace could take up some of this over-trading.

6.3 In projecting forward we have used Experian Retail Planner Briefing Note 2.2 "*Estimating and Projecting Sales Densities*" October 2004. This suggests that sales densities in the convenience sector are likely to increase at a rate of 0.75% per annum, whilst those for comparison goods are forecast to increase at 2.25% per annum. Total turnover from existing occupied units is projected to grow in real terms as follows:

Table 46: Turnover Growth - Existing Occupied Units 2005-2021

	£ million				
	2005	**2006**	**2011**	**2016**	**2021**
Convenience	130.254	131.231	136.226	141.410	146.794
Comparison	208.291	212.978	238.039	268.052	297.360

Source: KF

6.4 In addition to this floorspace there are outstanding planning permissions and other retail proposals which we consider likely to come on stream in the analysis period. These include the Morrison's extension, the Tesco (Church Wood Drive) extension, the Priory Meadow extension and the retail element of the Station Plaza proposal. Assuming these come on stream in 2006, the turnover from 2005 proposed new floorspace in the study period is as follows:

Table 47: Turnover Growth of Unimplemented Proposals/Permissions 2006-2021

	£ million				
	2005	**2006**	**2011**	**2016**	**2021**
Convenience	-	9.180	9.529	9.892	10.228
Comparison	-	25.960	29.015	32.429	36.246

Source: KF

6.5 Retail capacity is assessed as the difference between the expenditure available to an area and the turnover required by the retail businesses within that area. Tables 46 and 47 combined give the turnover required by existing and proposed floorspace (at 2005). The following capacity analysis uses the same projected turnover and forecast expenditure assumptions throughout - the variable in the analysis is the population forecasting assumption.

7.0 Capacity Analysis

Convenience Goods

7.1 At 2005 we consider that convenience goods expenditure retained in Hastings is substantially above the convenience turnover required by Hastings retailers. The pending extensions to two of the larger supermarkets (Morrisons and Tesco) indicate the likelihood that the operators of both stores are currently over-trading. The store extensions are proposed to include both convenience and comparison goods. Applying town-wide average convenience sales density figures to this sum, the range of capacities identified as follows:

Table 48: Convenience Goods capacity Analysis

	Capacity in Sq m (net)				
Projection Type	**2005**	**2006**	**2011**	**2016**	**2021**
Best estimate	3398	2222	2689	2862	2860
Low (best -20%)	3284	2086	2364	2423	2363
High (best +20%)	3502	2358	3010	3299	3351
No Development post-2004	3150	1918	1448	1046	766

Source: KF

7.2 The town average convenience sales density (£7264 sq m in 2005) is a lower figure than many of the leading convenience store operators. For example, the best estimate capacity figure (2860 sq m) for 2021 would equate to 2186 sq m for J Sainsbury and 2036 sq m for Tesco.

7.3 All four projection models generate requirements for additional convenience floorspace, though this diminishes for the "no development post-2004" projection as the declining population base and our assumptions concerning the growth in real terms in sales densities in this sector outweigh the growth in per capita spending on convenience goods. In both the "best estimate" and "low" projections, the capacity for convenience floorspace levels off or falls slightly between 2016 and 2021.

Convenience Goods Summary

7.4 To summarise, the "best estimate" projections for convenience goods identify capacity as follows:

Table 49: Convenience Goods Capacity (sq m)

	Capacity	**Net Changes**
2005	3398 sq m	Morrison & Tesco extensions to be implemented
2006	2222 sq m	(-) capacity falls by 1176 sq m as a result of outstanding permissions
2011	2689 sq m	(+) capacity increases a further 467 sq m
2016	2862 sq m	(+) capacity increases a further 173 sq m
2021	2860 sq m	(-) capacity stabilises - falls by 2 sq m

Source: KF

NB: These figures represent the capacity at each date and are not cumulative. The net change for each time interval is shown in brackets.

7.5 Our conclusions on market share analysis are presented in Part 2: Para 7.7. The capacity analysis is predicated on the assumption that market share rates are maintained. At present, Hastings has a substantial inflow of convenience expenditure from Rural North and Rural East and the identification of 3398 sq m of capacity at 2005 largely reflects what we believe to be substantial over-trading in this sector. The Morrison and Tesco extensions remove some of that capacity but around 2000 sq m remains. Given that much of the capacity results from consumers travelling relatively long distances into Hastings, there is the possibility that a new convenience store could be justified and located to the north or east of Hastings (outside the Borough in one of the market towns) which would remove some the identified capacity. We are aware of the possibility that Rye may secure a larger foodstore, the effect of which would be to impact upon Hastings convenience goods market share and thereby remove some of the capacity identified in this analysis.

Comparison Goods Total

7.6 We look initially at capacity for all comparison goods. We later consider separately non-bulky and bulky comparison goods but there is clearly increasingly an issue where the sectors which are characterised as bulky goods do not necessarily involve bulky goods or goods which cannot be adequately sold from town centre locations. At 2005 we consider that comparison goods expenditure retained in Hastings is broadly in line with the turnover required by Hastings comparison retailers looking specifically at non-bulky comparison goods. Taking into account existing commitments - largely the Priory Meadow extension and Station Plaza (and some of the comparison goods floorspace in the supermarket extensions in para 7.1 above, which we assume come on stream at 2006) - the application of town-wide comparison sales densities in our analysis produces the following range of capacities:

Table 50: Comparison Goods Capacity Analysis

	Capacity in Sq m (net)				
Projection Type	**2005**	**2006**	**2011**	**2016**	**2021**
Best estimate	250	-6449	2963	11979	22341
Low (best -20%)	-95	-6903	1757	10131	19971
High (best +20%)	617	-5995	4159	13821	24693
No Development post-2004	-560	-7496	-1704	4237	12169

Source: KF

7.7 The "best estimate" and "high" projections both show low levels of capacity at 2005; the 2006 figure, after the assumed completion of outstanding space, is negative in all projection models. All projections show a dramatic increase in capacity in the post-2011 period after the new floorspace has been absorbed as high levels of per capita spending growth continue.

Table 51: Comparison Goods Capacity (Best Estimate) (sq m)

	Capacity	Net Changes
2005	250 sq m	Priory Meadow Station Plaza Comparison goods element of supermarket extension to be implemented
2006	- 6449 sq m	(-) capacity falls 6199 sq m as a result of the implementation of new retail proposals which offsets previous over-supply
2011	+ 2963 sq m	(+) high growth in spending results in need for 9412 sq m
2016	+ 11979 sq m	(+) need for a further 9016 sq m identified
2021	+ 22341 sq m	(+) need for a further 10362 sq m identified

Source: KF

Bulky and Non-Bulky Comparison Goods

7.8 We have looked specifically at the bulky goods sector. This comprises spending on electrical goods, furniture and carpets and DIY products. These are goods which do not have to be sold in conventional retail park locations and indeed in Hastings itself the town and local centres account for more than half of the spending in these bulky goods categories. The capacities arising from this analysis do not therefore have to be met on out-of-town sites.

7.9 In 2005 we consider the bulky goods sector to be broadly in balance (turnover requirements and actual turnover are in balance) bearing in mind that Ravenside Park accounts for around 35% of Hastings generated expenditure in this sector. There are no outstanding bulky goods developments in the planning pipeline in Hastings at 2005 but we have taken into account 35% of the turnover of the proposed retail warehouse near Ravenside Park in Bexhill in the 2006 figures.

7.10 The application of average bulky goods sales densities in our analysis produces the following range of capacities using the four population projection variants.

Table 52: Bulky Goods Capacity Analysis (sq m)

	2005	2006	2011	2016	2021
Best estimate	365	55	2881	5621	8354
Low (best -20%)	243	-106	2460	4988	7559
High (best +20%)	497	217	3299	6552	9142
No Devt	76	-316	1251	2972	4946

Source: KF

7.11 All population projection models show some small capacity at 2005 between 76 and 497 sq m. This is largely absorbed by the effects of Wickes opening by 2006. After 2006 all models show increasing capacity for floorspace in the bulky goods spending categories. The "best estimate" figures are as follows.

Table 53: Bulky Goods Capacity (Best Estimate) (sq m)

	Capacity	Net Changes
2005	365 sq m	Wickes at Ravenside to be occupied
2006	55 sq m	Net reduction of 310 sq m reflecting opening of Wickes
2011	2881 sq m	Net increase of 2826 sq m reflecting growth in spending
2016	5621 sq m	Net increase of 2740 sq m
2021	8354 sq m	Net increase of 2633 sq m

Source: KF

7.12 The non-bulky comparison goods sector - which includes clothing and footwear, books, toys, sports, small household goods, jewellery, chemist and personal care goods - covers a range of products which are usually, but not exclusively, sold in town, district and local centres.

7.13 The following analysis is the residual of total comparison goods floorspace with the identified bulky goods capacity taken out. The analysis takes into account the proposed town centre floorspace which could be used for comparison goods sector sales.

Table 54: Non-Bulky Comparison Goods Capacity Analysis (sq m)

	2005	2006	2011	2016	2021
Best estimate	-41	-6405	659	7484	15660
Low (best -20%)	-289	-6818	-210	6142	13926
High (best +20%)	+1015	-5821	1520	8821	17382
No Devt	-499	-7243	-703	1860	8214

Source: KF

7.14 Three of the four projection models show a small net over-provision of non-bulky convenience goods floorspace at 2005. (The identified small total comparison goods surplus lies in the bulky, rather than non-bulky, goods sector). In 2006 the planned floorspace provision (Priory Meadow, Station Plaza and the comparison elements of the superstores) are shown to come on stream in 2006 producing a temporary over-supply. The rapid growth in spending produces significant capacity for additional floorspace for non-bulky convenience good spending.

Table 55: Non-Bulky Comparison Goods Capacity (Best Estimate)

	Capacity	Net Changes
2005	- 41 sq m	Very small net over-supply; new floorspace completed at Priory Meadow/Station Plaza
2006	- 6405 sq m	- 6364 sq m - net impact of new floorspace opening
2011	+ 659 sq m	+ 7064 sq m net new capacity
2016	+ 7484 sq m	+ 6825 sq m net new capacity identified
2021	+ 15665 sq m	+ 8181 sq m net new capacity identified

Source: KF

Comparison Goods Summary

7.15 Our conclusions on market share are presented in Part 2, Para 7.7 above. In projecting forward it is prudent to assume the maintenance of current market share rates, which will maintain the town's pre-eminence in non-bulky comparison goods retailing in the defined catchment area. This identifies capacity for 15,665 sq m (net) floorspace to 2021 with 7484 sq m net required by 2016. This high level of demand has been identified.

7.16 National planning policy guidance clearly seeks to concentrate new retail development within existing town and district centres, using a sequential approach to identify and prioritise development sites. Potential town centre development sites are considered in Part 4, Section 8 of this report and the development sites in the other centres are considered in the Background Document relating to Focus Groups.

7.17 In view of existing commitments, relatively high demand for new sites for non-bulky comparison goods floorspace does not really "kick-in" until after 2011 with 7484 sq m net required by 2016. This high level of demand runs through to the end of the projection period 2021 – by which time capacity for another 8181 sq m net has been identified.

7.18 Maintaining market share in respect of bulky goods results in the identification of capacity for 8354 sq m (net) floorspace in the period to 2021. This capacity builds up at a steady rate of between 2,600 and 2,500 sq m in each 5 year period – with 2880 sq m identified by 2011. This level of provision in any 5 year period does not equate to a "retail warehouse park" scale of development and could be met by the provision of sites for individual units.

7.19 Bulky goods floorspace has traditionally been provided in out of centre locations where good access by car was the most important locational attribute. The sequential approach priorities town centre sites, but in Hastings there is clearly a limited supply of large, flat sites suitable for bulky goods retailing and so the location of new provision requires careful consideration.

7.20 At present, much of Hastings' bulky goods market is served from Ravenside Park in Rother District. We have commented on the proposed Wickes store located adjacent to Ravenside Park and there is potential in the Plan period for more sites to come forward in Rother District which would also serve Hastings.

7.21 In the absence of suitable sites in or adjacent to existing centres, the Council may consider, where appropriate, sites adjacent to existing retail facilities which, whilst not identified as town, district or local centres, already have a place in the retail hierarchy. These are the existing out of town retail facilities which may already have good public transport links to supplement their accessibility by car modes. Such new provision could be in the form of development on adjacent land or could be achieved through redevelopment at higher density with, for example, decked car parking.

8.0 Retail Sector Job Creation Potential

8.1 This section considers the employment consequences of new retail provision.

8.2 At present there is considerable variation in the character of retail employment between different operators and in different retail sectors. Generally speaking, convenience businesses have a higher turnover of stock and wider product range requiring a higher number of staff for a given amount of floorspace. Higher turnover of stock means more people at the checkouts and more shelf fillers and warehousemen. Some comparison businesses rely more on staff with a good technical knowledge of their stock (eg. hi-fi and audio sales). These will not require the same number of staff for a given amount of floorspace but may require greater training (and possibly greater rewards) and may provide fewer opportunities for part-time working. High bulk items require large amounts of storage space, so retail warehouses tend to have even lower densities of staff per floorspace.

8.3 In order to assess the job creation potential of new floorspace in the Hastings retail sector we have had regard to pipeline planning commitments and proposed developments and to the floorspace identified in the capacity analysis. We have looked at the employment / floorspace information produced by Tesco for their Church Wood Drive store extension application which assumes 1 new job is created for every 18.2 sq m of gross retail floorspace. Tesco do not distinguish between full and part-time jobs.

8.4 As an alternative approach, the ODPM provides information from which it is possible to calculate a national employment/floorspace ratio figure by dividing a figure for all retail floorspace by all retail employment. This gives a figure of 1 job for every 41.9 sq m of retail floorspace.

8.5 There is clearly a wide discrepancy in these figures but the ODPM figures also take retail warehouse levels of employment densities into account.

8.6 The time period over which we are projecting may well produce changes in employment densities but our forecasts of job creation are based on current densities. In the analysis below we have used Tesco figures for the Tesco development but otherwise figures of 1 job per 20 sq m for convenience floorspace, 1 job per 35 sq m for comparison floorspace and 1 job per 60 sq m for bulky goods in retail warehouse formats.

8.7 The table below sets out the employment potential of permitted and proposed schemes in the Hastings retail sector.

Table 56: Job Creation - Current Proposals

Proposal	Status	Additional Gross Floorspace (sq m)	Employment Total
Morrisons, Queen St	PP Granted	2137	107
Tesco, Church Wood Dr	Subject to call-in	1603	88
Priory Meadow Extension	PP Granted	1467	42
Station Plaza	Application	1394	40
Pelham Square	Pre-Application	3716	106
Total		**10317**	**383**

Source: KF

8.8 As the above table demonstrates, the pipeline permissions and proposals of which we are aware have the potential to create a total of 383 additional jobs in Hastings. The retail sector has the specific characteristic of employing a large number of ‘informal’ school leavers, returners to the labour market and part-time staff. Such a transient labour force is further destabilised by seasonal fluctuations in staffing levels when overall trading patterns increase.

8.9 The Department of Trade & Industry provides an assessment of full and part-time splits in the retail sector. On this basis, 161 (42%) of jobs are likely to be full-time positions, whilst 222 (58%) will be part-time in nature.

8.10 Applying these figures to the retail capacity identified in Part 3.0, the following levels of job creation can be identified.

Table 57: Job Creation at 2011

	Net Floorspace (sq m	Gross Floorspace (sq m)	Employment
Convenience[1]	2689	3585	179
Non-bulky comparison[1]	659	879	25
Bulky goods[2]	2881	3033	51
Total			**255**

[1] net to gross 75%
[2] net to gross 95%
Source: KF

Table 58: Job Creation at 2016

	Net Floorspace (sq m	Gross Floorspace (sq m)	Employment
Convenience[1]	173	231	12
Non-bulky comparison[1]	6825	9100	260
Bulky goods[2]	2740	2884	48
Total			**320**

[1] net to gross 75%
[2] net to gross 95%
Source: KF

Table 59: Job Creation at 2021

	Net Floorspace (sq m	Gross Floorspace (sq m)	Employment
Convenience[1]	-	-	0
Non-bulky comparison[1]	8181	10908	312
Bulky goods[2]	2633	2772	46
Total			**358**

[1] net to gross 75%
[2] net to gross 95%
Source: KF

8.11 Total employment levels in retail over the study period are estimated as follows.

Table 60: Total Employment over Study Period

	Jobs
Current Proposals	383
At 2011	255
At 2016	320
At 2021	358
Total to 2021	**1316**

Source: KF

Part 4

The Town Centre

Part 4: The Town Centre

1.0 Introduction

1.1 In this part of the report we focus upon Hastings town centre. We first consider in Section 2 its role locally and within the wider geographical context. Section 3 presents some of the findings of our telephone survey identifying the centres used by people in the study area in each of the main comparison goods sectors. Section 4 considers the retail composition of the town centre comparing it to national average figures for all town centres. Section 5 looks at the findings of the telephone survey and on-street survey in terms of attributes to Hastings town centre, and we report in Section 6 on the town centre focus group meetings. Section 7 presents our conclusions on the town centre looking at its future role in accommodating much of the new retail development required to meet need over the study period.

2.0 The Role of Hastings Town Centre

2.1 Hastings town centre is the focus for shopping, leisure, business and cultural activities in Hastings Borough which has a population of 85,029 (census 2001). It also serves a wider rural hinterland of smaller settlements though its role is limited by the relative proximity of the towns of Eastbourne to the west, Tunbridge Wells to the north and, to a lesser degree, by Ashford to the north east.

2.2 It is the pre-eminent retail centre for the Borough, though for historical reasons there is a smaller town centre at St Leonards and the centre of Old Hastings, which is a specialist retail centre with a significant role in serving the evening and tourist economies. This is referred to as "Old Town". To the west, and adjoining Hastings, Bexhill town centre is a lower order centre serving the town itself independently of Hastings. Hastings town centre is the focus of the town's road and rail networks.

2.3 The Priory Meadow shopping centre opened in 1997 and has substantially improved the make-up of the town centre, increasing the number of larger floorplate, rear-serviced units and providing multi-story car parking in the centre of the town. It has raised the profile of the town centre fulfilling a long term objective of development plan policy.

2.4 Comparing Hastings with the other nearby towns illustrates its relative position in the retail hierarchy:

Table 61: Hastings and its Competitors in National Town Centre Rankings : Floorspace

Centre	Floorspace sq m	PROMIS[1] National Ranking	Sub-Regional Ranking
Ashford	52,000	189	10
Brighton	147,000	20	1
Canterbury	76,000	130	6
Crawley	85,000	107	9
Dover	56,000	180	9
Eastbourne	99,000	80	4
Folkestone	67,000	153	8
Hastings	70,000	144	7
Maidstone	141,000	24	2
Tunbridge Wells	108,000	57	3

[1] Based upon the total amount of floor space in the centre
Source: PMA

2.5 This table shows the 10 nearest towns which are ranked in the top 200 in the Kent/Sussex sub-region. Ranked by the amount of floor space, Hastings is ranked 144th nationally and is 7th in this sub-regional list. Its principal competitors are Eastbourne (80th/4th), Tunbridge Wells (57th/3rd) and Ashford (189th/10th).

2.6 A second ranking is based on the CB Richard Ellis Shopping Population which takes into account the centre's penetration of the total retail catchment area (i.e. the proportion of the total town's population who use the centre).

Table 62: Hastings and it Competitors in National Town Centre Rankings : Population

Centre	CB Richard Ellis Shopping Population National Ranking	Sub-Regional Ranking
Ashford	142	7
Brighton	40	1
Canterbury	54	2
Crawley	59	3
Dover	199	10
Eastbourne	69	4
Folkestone	187	9
Hastings	144	8
Maidstone	73	6
Tunbridge Wells	72	5

Source: CBRE

2.7 Using this measure (which gives Hastings precisely the same national ranking - 144th - as the floor space size measure) the sub-regional rankings of Hastings' main competitors are as follows:

- Eastbourne: 69th/4th
- Tunbridge Wells: 72nd/5th
- Ashford: 142nd/7th

2.8 In this measure, Hastings' sub-regional position is 8th. The fact that Hastings has the same national ranking by each of these measures may be indicative of its relative balance between the floor space it offers and the population it serves. Ashford on the other hand has relatively low levels of floor space provision for the population it serves, whilst Maidstone has a disproportionately large amount of floor space for the population it serves. Of the close competitors, Eastbourne and Tunbridge Wells both have disproportionately larger retail floor space for the catchment populations identified.

2.9 One further relevant ranking used for retail centres is that based on the number of retail enquiries. Retail operators seeking representation or larger premises in particular towns register their requirements with retail agents. These are logged and the lists can be analysed. We attach in the Appendices volume the latest print out available for Hastings.

Table 63: Hastings and it Competitors in National Town Centre Rankings
Retail Requirements

Centre	Retail Requirements No.	National Ranking	Sub-Regional Ranking
Ashford	30	144	9
Brighton	143	7	1
Canterbury	91	34	3
Crawley	86	36	4
Dover	27	159	10
Eastbourne	38	118	7
Folkestone	35	129	8
Hastings	48	88	6
Maidstone	71	51	5
Tunbridge Wells	93	28	2

Source: PMA

2.10 This table shows a healthy demand from retailers and others for representation in Hastings. The list in the Appendices shows interest in a wide range of areas including convenience retailers (e.g. Aldi), a range of comparison retailers (e.g. Comet Group, Silverscreen, Barbour), A3/A4/A5 businesses (e.g. Tchibo, Subway. Pitcher & Piano) and leisure businesses (e.g. LA Fitness). Compared with other measures, Hastings clearly ranks well both nationally and in the sub region on measures of retail demand.

2.11 In a ranking based on retailers' requirements Hastings appears at number 88 nationally and is 6th in the sub-region, ahead of Eastbourne, reflecting unfulfilled demand for appropriate premises.

3.0 Shopping Patterns in the Study Area

3.1 In order to inform this study a telephone survey was conducted of 1000 households with the 6 expenditure zones identified on Plan 1 (page 24). This was a stratified sample based on a questionnaire agreed by the Borough Council. A copy is included as Appendix 2 to this report. The survey asked a series of questions aimed at identifying retail spending characteristics and these underpin the assumptions used in the capacity analysis presented in Part 3 of the report.

3.2 Respondents were asked to identify which centre or retail park they used most for a range of comparison goods. They were then asked where else they shopped for those goods. The results of the survey are considered below. The survey zones are shown on Plan 1.

Clothes and Shoes

3.3 Hastings town centre is the most frequently used shopping centre in the study area for clothes and shoes, with 41% of all households mentioning it as their main centre - twice as many as listed Eastbourne town centre. Hastings East (65%), Hastings West (58%) and Rural East (43%) had the highest levels of usage. For both Hastings East and West, Eastbourne town centre was the second most visited at 11% and 12% respectively.

3.4 The second most widely supported centre was Eastbourne town centre with 20% identifying it as their main choice. Bexhill (43%) and Rural West (34%) were the main areas of support. Tunbridge Wells town centre, with a 7% share was the third most supported centre. It was the main choice for 34% of Rural North respondents. Bexhill town centre was mentioned by 6% in the study area, of which the largest component was the 19% of Bexhill residents who mentioned it.

Table 64: Main Shopping Centre for Clothes and Shoes

Location	Total	HE	HW	BH	RE	RN	RW
Hastings TC	41%	66%	59%	9%	44%	30%	11%
E'Bourne TC	20%	11%	12%	43%	5%	9%	34%
Tun Wells TC	7%	3%	3%	2%	8%	34%	13%
Bexhill TC	6%	N/A	3%	19%	N/A	3%	6%
E'Bourne RP	5%	2%	3%	10%	1%	N/A	15%

Source: Telephone Survey

Major Electrical

3.5 Ravenside Retail Park is the most frequently used retail facility for purchasing major electrical items with 33% of households nominating it as their main centre. With Currys, Comet and PC World it has a strong offer in this sector. Within the sub-areas, the highest shares are Bexhill (46%), Hastings west (42%) and Hastings East (34%).

3.6 Hastings town centre is the second most widely supported centre with 16% overall using it as their main centre. Hastings East (28%), Rural East (25%) and Hastings West (21%) are the main areas of support. St Leonards town centre and Bexhill town centre both have 7% support. Eastbourne town centre is named by only 3% of respondents and is lower than Eastbourne retail parks (4%). It is interesting to note that Eastbourne retail parks (28%) are the choice of a greater proportion of Rural West households than is Ravenside Park (16%).

Table 65: Main Shopping Centre for Major Electrical Items

Location	Total	HE	HW	BH	RE	RN	RW
Ravenside Retail Park	33%	34%	42%	46%	25%	20%	16%
Hastings TC	16%	28%	21%	2%	25%	12%	2%
St Len TC	7%	9%	17%	2%	5%	8%	1%
Bexhill TC	7%	2%	3%	18%	3%	2%	9%
E'Bourne RP	4%	1%	N/A	3%	N/A	3%	28%

Source: Telephone Survey

Furniture and Carpets

3.7 Hastings town centre has the largest proportion of "main centre" mentions in the furniture and carpets sector in the study area with 23% overall and 39% in Hastings West, 37% in Hastings East and 27% in Rural East. Small proportions (less than 5%) nominated individual stand-alone stores.

3.8 Eastbourne town centre (8%), Tunbridge Wells (6%) and Eastbourne retail parks (6%) are the next most visited centres.

Table 66: Main Shopping Centre Furniture and Carpets

Location	Total	HE	HW	BH	RE	RN	RW
Hastings TC	23%	37%	39%	7%	27%	15%	1%
E'Bourne TC	8%	2%	2%	18%	2%	7%	22%
Tun Wells TC	6%	6%	4%	2%	6%	17%	4%
E'Bourne RP	6%	3%	2%	9%	3%	3%	18%
Bexhill TC	5%	N/A	2%	19%	2%	2%	1%

Source: Telephone Survey

Small Household Goods

3.9 Hastings town centre is the most nominated main centre for small household goods purchases, with 38% overall. Its share is 67% in Hastings East, 52% in Hastings West, 39% in Rural East and 26% in Rural North. Its share is more than 3 times that of Eastbourne town centre which is second with 11% overall - Rural West (29%) and Bexhill (25%). Bexhill town centre is in third place with 10% overall but this has little support beyond Bexhill itself (36%).

Table 67: Main Shopping Centre Small Household Goods

Location	Total	HE	HW	BH	RE	RN	RW
Hastings TC	38%	67%	52%	7%	39%	26%	11%
E'Bourne TC	11%	3%	4%	25%	3%	6%	29%
Bexhill TC	10%	1%	3%	36%	N/A	2%	6%
E'Bourne RP	4%	2%	3%	3%	1%	2%	21%
Tun Wells TC	4%	2%	1%	1%	4%	22%	3%

Source: Telephone Survey

DIY and Garden Goods

3.10 Ravenside Retail Park is the main centre in the overall study area with 27% of main shop mentions - Bexhill (50%), Hastings West 37%) and Hastings East (22%). The B&Q store on Rye Road received more main centre mentions than Hastings town centre and was second overall with 13% - Hastings East (28%) and Rural East (22%) have the largest proportion of main centre mentions.

3.11 Hastings town centre is third, mentioned by 9% overall with the most mentions in Hastings East (17%) and Hastings West (12%). Bexhill town centre is fourth with 7% overall and Hastings Focus DIY store fifth with 5% overall. Clearly, this is a sector where the out-of-town retail formats are most successful. The two main Hastings stores combined have an 18% share of main store mentions compared to 9% for the town centre.

Table 68: Main Shopping Centre DIY and Garden Goods

Location	Total	HE	HW	BH	RE	RN	RW
Ravenside RP	27%	22%	37%	50%	5%	10%	13%
Hastings B&Q (Rye Rd)	13%	28%	5%	3%	22%	7%	1%
Hastings TC	9%	17%	12%	1%	7%	9%	2%
Bexhill TC	7%	2%	6%	17%	1%	3%	11%
Hastings Focus DIY	5%	6%	6%	-	9%	6%	3%

Source: Telephone Survey

Books, Toys and Sports Goods

3.12 Hastings is again the study area's main centre for books, toys and sports goods, with 40% of the main store mentions overall. Hastings East and West each have 66% main mentions and Rural East has 43%.

3.13 Hastings town centre has more than 3 times the number of main store mentions than second place Eastbourne town centre with 13% overall and 39% of main centre mentions in Rural West and 26% in Bexhill. Bexhill town centre is third with 9% overall - again, mostly from Bexhill itself with 34% main centre mentions.

Table 69: Main Shopping Centre Books, Toys and Sports Goods

Location	Total	HE	HW	BH	RE	RN	RW
Hastings TC	40%	66%	66%	9%	43%	24%	9%
E'Bourne TC	13%	4%	8%	26%	4%	7%	39%
Bexhill TC	9%	N/A	1%	34%	N/A	2%	5%
Tun Wells TC	4%	1%	1%	N/A	3%	29%	3%
E'Bourne Retail Parks	3%	2%	1%	6%	N/A	N/A	12%

Source: Telephone Survey

Conclusions

3.14 Hastings town centre is the pre-eminent centre within the study area for clothes and shoes, furniture and carpets, small household goods and books, toys and sports. It is the pre-eminent centre for Hastings East and West and has relatively high levels of main study mentions from Rural East and, to a lesser degree, Rural North. In Rural North, Hastings is the main centre for small household goods but in the clothes and shoes, furniture and carpets and books, toys and sports goods sectors it is second to Tunbridge Wells.

3.15 Bexhill and Rural West have relatively low main shopping mentions for Hastings town centre and in the clothes and shoes, small household goods and book, toys and sports goods categories, Eastbourne town centre has more mentions.

3.16 Ravenside Retail Park dominates the bulky goods sectors - electrical items and DIY and garden products. Hastings town centre has the largest share of main centre mentions in the furniture and carpets sector.

3.17 Within the defined study area, Hastings clearly has to compete with Eastbourne in the west and Tunbridge Wells to the north. It is clearly the dominant centre overall but must be aware of the need to maintain its place in the market. Improved road links to Bexhill would help to build up trade there which is currently lost to Eastbourne but we are aware this is a difficult area with perceptions of image as well as road links to be addressed.

4.0 The Retail Composition of Hastings Town Centre

4.1 The published Goad information for Hastings town centre shows the retail composition of the town centre at June 2004 and provides a comparison with the average for Great Britain. The average is derived from their consideration of all town centres, irrespective of their size or position in the retail hierarchy.

Table 70: Hastings Town Centre Retail Composition

Retail Category	No of Units	Sq M	Hastings %	GB %	VAR
Bakers	4	370	0.54	1.03	-
Butchers	1	0	-	0.45	-
Greengrocers & Fishmongers	3	280	0.40	1.56	-
Groceries & Frozen Food	7	5480	7.91	12.04	-
Off-licences & Home Brew	2	280	0.40	0.43	-
CNT & Convenience	9	650	0.94	1.34	-
Convenience Total	**26**	**7060**	**10.19**	**16.89**	**-**
Footwear & Repairs	10	930	1.34	1.65	-
Mens & Boys Wear	4	650	0.94	1.10	-
Womens & Childrens Wear	18	3160	4.56	4.74	-
Mixed and General Clothes	9	1300	1.88	4.68	-
Furniture, Carpets, Textiles	18	3620	5.23	5.15	+
Books, Arts & Crafts, Stationers	16	2790	4.02	3.58	+
Electric Home Entertainment, Phones, Video	22	2420	3.49	3.93	-
DIY Hardware & Household Goods	10	4830	6.97	5.11	+
Gifts, China, Glass & Leather Goods	9	740	1.07	1.02	+
Cars, Motorcycles & Accessories	4	650	0.94	2.22	-
Chemists, Toiletries & Opticians	11	3250	4.69	4.00	+
Variety, Department & Catalogue	8	11330	16.35	9.20	+
Florists & Gardens	5	560	0.80	0.48	+
Sports, Toys, Cycles & Hobbies	17	1950	2.82	2.72	+
Jewellers, Clocks & Repairs	9	740	1.07	1.03	+
Charity, Pets & Other	16	1670	2.41	2.46	-
Comparison Total	**186**	**40600**	**58.58**	**53.07**	**+**
Restaurant, Café, Fast-food	51	5200	7.51	8.26	-
Hairdressing, Beauty & Health	21	1390	2.01	3.15	-
Launderette & Dry Cleaners	4	370	0.54	0.48	+
Travel Agents	5	460	0.67	1.11	-
Banks & Financial Services	16	2600	3.75	5.13	-
Building Societies	1	370	0.54	0.53	-
Estate Agents & Auctioneers	20	2320	3.35	2.05	+
Service Total	**118**	**12730**	**18.36**	**20.76**	**-**
Employment, Careers, Pos & Info	6	840	1.21	1.28	-
Vacant	42	8.08	11.66	8.01	+
Misc Total	**48**	**8.92**	**12.87**	**9.28**	**+**
GRAND TOTAL	**378**	**69.31**	**100.00**	**-**	

Source: Goad

Convenience Businesses

4.2 Compared with the Great Britain average, Goad reports a deficiency in the amount of floor space in convenience business use for Hastings. It makes up 10.19% of the floor space in Hastings and 16.89% nationally. Each of the retail categories is under-represented in Hastings, with the difference most marked in terms of butchers, greengrocers and bakers and least marked in terms of off-licences/home brew. Knight Frank's survey, undertaken in April 2005 and using the 2005 Rating Valuation records (see Technical Appendices Volume) shows 30 convenience businesses totalling 9287 sq m. There are new convenience outlets in bakers, confectioners and grocers, and one unit fewer in greengrocers and CTN. In qualitative terms Hastings has a good range of specialist convenience outlets and the Morrisons store on Queens Road (outside the Local Plan defined centre but within our study area) gives ready access in the town centre to a food superstore. The recent Londis in Harold Place ensures that convenience shopping needs are met at the southern end of the town centre. Overall, Hastings has good convenience provision both qualitatively and quantitatively.

Comparison Businesses

4.3 Compared with the Great Britain average, Hastings has a greater amount of comparison floor space than would be expected, with 58.58% of the total compared to 53.07% nationally. Between the sub-categories of comparison businesses there is a more complicated picture of relative provision. The following comparison business categories are under-represented in Hastings compared with Great Britain as a whole:

- footwear and repairs
- men's and boy's wear
- women's, girl's and children's wear
- mixed and general clothing
- electricals, home entertainment, phones and videos
- cars, motorcycles and accessories
- charity, pets and other comparison.

4.4 Of these, the widest discrepancies are in mixed and general clothing and cars, motorcycles and accessories. The comparison business categories where Hastings was over-represented in the Goad 2004 survey compared with Great Britain as a whole were:

- furniture and carpets
- books, crafts, stationery
- DIY, household and household goods
- gifts, china and glass

- chemists, toiletries and opticians
- variety, department and catalogue
- florists and gardens
- sports, toys, cycles and hobbies
- jewellers, clocks and repairs

4.5 Over-provision is most pronounced in variety, department and catalogue shops, florists, and DIY and hardware. Knight Frank's survey undertaken in April 2005 indicates a reduction in the number of comparison stores over the year, with slight reductions in most categories except women's, girl's, children's and general wear, books, arts, crafts and stationers, toys, hobbies, cycles and sports and "other comparison". Variety stores, footwear and repair and electrical, music and photographic showed no change.

Service Goods

4.6 In overall terms, Goad suggest that in 2004, 18.36% of floor space was in service uses in Hastings compared to 20.76% nationally. Hastings was under-represented in the following categories:

- restaurants, cafes, fast food
- hairdressing and beauty
- travel agents
- banks and financial services
- building societies.

4.7 The most significant of these is travel agents, followed by hairdressing and banks and financial services.

4.8 Hastings is over-represented in two categories:

- launderettes and dry cleaners
- estate agents and auctioneers.

4.9 Over-representation is most marked in the estate agency sector.

4.10 Knight Frank's 2005 survey shows a significant increase in restaurants, cafes, fast-food and takeaways, and a marginal increase in hairdressers and building societies. Banks and financial services were unchanged and all other service businesses showed small decreases.

Miscellaneous

4.11 Goad interprets miscellaneous uses as employment agencies, careers, post office and information centres. Vacant units are also included in this broader category (see Table 70).

4.12 Their figures suggest that Hastings has a higher proportion of its floor space in the miscellaneous category (including vacant units) - 12.87% - compared with 9.28% nationally. According to Goad, the proportion of vacant floor space in Hastings town centre in 2004 was 11.66% - the comparable national figure was 8.01%.

4.13 The Knight Frank 2005 figure for vacant floor space shows an increase in the number of units (from 42 to 43) but a reduction in the amount of floor space (from 8080 sq m to 6286 sq m). At 2005 therefore the proportion of vacant floorspace was broadly in line with the national average. Knight Frank's "other miscellaneous" figure is not directly comparable to the Goad figure. Ours includes a variety of non-retail uses in retail-type premises including other services such as A2 uses - for example, accountants, solicitors, leisure uses (gyms and snooker halls), information centres, turf accountants, funeral directors, dentists and so forth - which do not fall into the other categories.

4.14 Our survey therefore shows substantially more miscellaneous units and floor space compared to the Goad survey - 60 units and 8128 sq m compared with 6 units and 840 sq m.

5.0 Attitudes to Shopping in Hastings Town Centre

Household Survey

5.1 The telephone survey undertaken in March 2005 and described in Section 3 above provides information on respondents' usage of and attitudes to and opinions of Hastings Town Centre. Throughout the study area the frequency of visits was as follows:-

Table 71: Frequency of Visit to Hastings Town Centre 2005

	Hastings E %	Hastings W %	Bexhill %	Rural E %	Rural N %	Rural W %
More than once a week	41	28	3	13	3	0
Weekly	30	30	5	18	14	5
Fortnightly	13	19	10	16	17	6
Monthly	12	17	24	22	27	17
Less than monthly/ more than yearly	4	5	36	25	26	31
Yearly or less often	0	0	15	6	7	27
Never	1	0	7	1	6	13
Don't Know	1	0	1	0	0	2

Source: telephone survey

5.2 Hastings East has clearly the greatest proportion of frequent visitors with 41% visiting more than once a week and a further 30% visiting on a weekly basis. 96% visit on a monthly or more frequent basis. Hastings West by comparison has 28% visiting more than once a week and a further 30% visiting on a weekly basis with 94% visiting on a monthly or more frequent basis. Of the remaining expenditure zones, Rural East has the highest proportion of frequent visitors with 13% visiting more than once a week and a further 18% visiting on a weekly basis. In total, 69% of Rural East respondents visit on a monthly or more frequent basis. The frequency of visits from all of the other zones is less pronounced but it is interesting to note that, from Rural North, 61% visit on a monthly or more frequent basis, with figures for Bexhill and Rural West of 42% and 28% respectively. The proportion saying that they visit yearly, less than yearly or never is relatively low – 0% Hastings West, 1% Hastings East, 7% Rural East, 13% Rural North, 22% Bexhill and 40% Rural West.

5.3 With relatively high visitation levels from at least four of the expenditure zones, opinions and attitudes to the Town Centre are likely to be based on reasonable experience. Respondents were asked to give satisfaction scores to various aspects of Hastings Town Centre using a scale of 1 to 5 where 1 was *'not at all satisfied'* and 5 was *'very satisfied'*. The mean scores are set out below.

Table 72: Satisfaction Scores Hastings Town Centre 2005

	HE	HW	B	RE	RN	RW	Overall Score
Public Transport	2.60	3.00	3.17	2.88	3.44	2.72	2.88
Public Facilities	3.44	3.54	3.26	3.36	3.39	2.90	3.36
Car Parking	2.52	2.59	2.67	2.90	3.26	2.64	2.70
Range of Shops	3.24	3.39	3.62	3.37	3.41	3.23	3.38
Opening Hours of Shops	3.99	4.07	4.04	3.92	4.09	3.84	4.00
Range of Services Available	3.94	4.09	3.74	3.85	3.75	3.58	3.87
Evening Activities	2.92	3.14	3.41	3.18	2.81	2.91	3.07
Appearance of Buildings	3.38	3.45	3.19	3.15	3.14	2.79	3.25
Appearance of Streets	3.29	3.29	3.25	3.17	3.03	2.84	3.20
Average Score	**3.26**	**3.40**	**3.37**	**3.31**	**3.37**	**3.05**	**3.30**

NB: Shading indicates scores which are higher than the "overall" score for that variable
Source: Telephone survey

5.4 The shading on Table 72 gives a clear impression that, with the exception of Rural West, which consistently gives below average satisfaction scores, there is little correlation between visitation rates and satisfaction scores. After Rural West the lowest overall score comes from Hastings East, which has the highest frequency of visits. It gives 4 out of 9 variable above average scores. Hastings West gives 8 out of 9 variable above average scores and has the highest overall score. Surprisingly Bexhill and Rural North, with relatively low visitation levels give higher overall scores than Hastings East and Rural East and higher than average scores of 5 out of 9 variables. Rural East by contrast has high visitation rates but higher than average scores in only 2 out of 9 variables.

5.5 Overall the lowest overall levels of satisfaction (2.70) relate to car parking. (Whilst this is clearly a matter of some concern, it should be remembered that the 2.70 score is higher than the mid point of satisfaction/ dissatisfaction which would be 2.50) In this aspect the two Hastings zones are the most dissatisfied, with the 2.52 Hastings East score the lowest score given by any zone to any aspect of the Town Centre. This could reflect the perceived difficulty in parking linked to the length of car journey since Hastings East actually contains the Town Centre and would have the shortest car journeys. Rural East and North have relatively longer journeys and higher levels of satisfaction.

5.6 The next overall lowest level of satisfaction relates to public transport – buses and trains (2.88). Again Hastings East has the lowest satisfaction score though rural West and East are also low. This may reflect again the quality of service and distance issue, though the disparity between the scores of

Hastings East and West is not easily explained – unless the bus service form the west into the Town Centre is considered generally to be better than that from the east.

5.7 The third lowest overall score relates to the evening economy (3.07). Rural North, Rural West and Hastings East give the lowest approval ratings and Bexhill, surprisingly, gives the highest.

5.8 The appearance of the streets has the fourth lowest overall score (3.20). It is noticeable that the two Hastings zones give the highest levels of satisfaction and Rural West the lowest.

5.9 The appearance of the buildings has the next lowest overall score (3.25). It is noticeable that the two Hastings zones again give the highest levels of satisfaction and Rural West again the lowest.

5.10 Looking at the aspects with the highest degrees of satisfaction, an overall score of 3.36 was given for public facilities – toilets, seating, signposts and so forth. The two Hastings zones again gave the highest scores and Rural West, the lowest.

5.11 The range of shops available had an overall satisfaction score of 3.38. This aspect had a reasonably uniform score across the study area with the highest score coming from Bexhill (3.62) and the lowest from Rural West (3.23).

5.12 The range of services available had an even higher rating at 3.87, with the highest scores from the areas which visit most frequently, Hastings East and West and Rural East. The Hastings West score of 4.09 is the highest score for any aspect from any expenditure zone.

5.13 The highest overall satisfaction score (4.00) related to the typical opening hours of shops. Scores in excess of 4 were given in Hastings West, Bexhill and Rural North. The recent low levels of support for late night opening may reflect the local satisfaction with existing opening hours.

5.14 Overall the approval ratings for Hastings seem very good. Parking is clearly a local concern and it will be necessary to ensure that the parking needs of shoppers are reflected in the regeneration development schemes that are being promoted in the town centre. The relatively low public transport scores from Hastings East may indicate that there are deficiencies in the bus services feeding into the Town Centre, though further survey work would be needed to look into the reasons for these scores.

5.15 Respondents were asked to suggest ways in which they thought the town centre could be improved. These responses were unconstrained and therefore the figures below show the percentage of respondents who made the suggestion. They were able to give more than one reason and therefore the columns do not add to 100. The comments have been grouped as follows:-

Table 73: Suggested improvements to Hastings Town Centre 2005

	Hastings E %	Hastings W %	Bexhill %	Rural E %	Rural N %	Rural W %
General physical improvements	54	55	42	46	46	35
Improvements to shopping	46	42	23	43	28	33
Improvements to Leisure	23	19	7	8	13	7
Other Improvements	5	3	3	8	4	2
No improvements needed	8	14	17	14	15	15
Don't Know	5	6	27	12	19	24

Source: Telephone survey

5.16 In all study zones general improvements were most frequently mentioned improvements that respondents wished to see in Hastings Town Centre. The specific matters that have been grouped into this general category are set out below:

- *Security* – better policing, greater police presence, CCTV cameras. Overall 19% gave these reasons with the highest rates in Hastings East (25%) and Hastings West (17%)

- *Parking* – More, better, cheaper and free parking. Overall 17% gave these reasons with the highest rates in Hastings West (22%) and Hastings East (21%)

- *Cleaner Streets* – tidier and with less litter. Overall 9% gave this reason. Hastings West and Rural North were the areas with the highest numbers of mentions.

- *Stop people hanging around* – youths, drunks, drug takers, beggars etc. Overall this was mentioned by 7% of people, the highest proportion of mentions coming from Hastings East.

- *Public transport* – better, cheaper. Mentioned by 5% of respondents, with Hastings West (10%) and Rural East (7%) being the areas with the highest proportion of mentions.

- *Other matters* – raised by fewer numbers of respondents include better toilet facilities, less congestion, improvements to street lighting, planting, seating and signage, fewer vacant shops. The numbers making these suggestions was much smaller than the items specified above.

5.17 The second most important group of suggestions related to shopping improvements. The kind of suggestions given here are more specifically as follows:-

- *More shops* – better range of shops, more of specific types of shops – clothes, electrical and specific operators/ chains. Overall 21% mentioned this as an improvement, with the highest numbers in Hastings East (31%), Hastings West (29%) and Rural East (25%) – the areas with the highest frequency of use.

- *Maintenance* – better upkeep of buildings, improve appearance of shops. This was mentioned overall by 6% of respondents with the highest proportions in Rural West (13%) and Rural East and North (both 8%).

- *Bigger shops* – A big department store or supermarket. This was mentioned by 6% overall with the highest proportions in Hastings East (8%) and Hastings West (6%).

- *Refurbishment* – revamp of shopping centre, areas or specific shops. This was mentioned by 5% overall with the highest proportions in Rurals West and East.

- *Better quality* – more upmarket, modern shops fewer charity shops, pound shops and takeaways. Mentioned by 5% overall with the highest proportions in Rural East (11%), Hastings West (6%) and East (5%).

5.18 Leisure improvements were mentioned by 15% overall. The kind of leisure improvements respondents had in mind were as follows:-

- *Better leisure* – more leisure activities available – sports centre, cinema, better facilities. Mentioned by 7% overall, the highest proportions were in Hastings East and West (both 12%).

- *More activities* – better facilities for the young. Mentioned by 5% overall, the highest proportions being in Hastings East and West (both 7%).

- *Better restaurants* – eateries, food outlets. Mentioned by 4% overall, the highest proportions were in Hastings East (5%) and Hastings West (3%).

- *Better pubs* – more clubs, better nightlife, activities. Mentioned by 3% overall, the highest proportions were in Hastings West (5%) and Hastings East (3%).

5.19 Overall 13% said that the centre could not be improved. The proportion of respondents making this statement ranged between 14% and 17% except in Hastings East where it was only 8%. This may reflect the fact that those who use it most, know it best and have a greater interest in its improvement. Given the wider public perceptions of Hastings, specific questions were raised concerning people's feeling about their feelings about their own security whilst shopping in the Town Centre. The following table shows the proportions of people in each sub area who broadly felt 'safe' and 'not safe' in the Town Centre during the day and at night. They were asked to assign a score between 1 and 5, where 1 was 'not at all safe' and 5 was 'very safe'. The mean scores for day and night time assessments are also given below

Table 74: Perceptions of Safety - Hastings Town Centre 2005

	Perception of Safety	Hastings E	Hastings W	Bexhill	Rural E	Rural N	Rural W
DAY	Not Safe	9%	6%	14%	13%	16%	17%
	Safe	69%	72%	53%	57%	53%	49%
	Mean Score	3.87	3.87	3.57	3.67	3.54	3.40
NIGHT	Not Safe	51%	46%	44%	50%	42%	45%
	Safe	15%	12%	8%	8%	6%	5%
	Mean Score	2.24	2.29	1.94	2.08	1.98	1.78

Source: Telephone Survey

5.20 The table shows broadly that a higher proportion of Hastings residents consider the town centre to be safe during the day (69% and 72%) whereas Bexhill and the rural zones have figures between 49% and 57%. Broadly speaking the perceptions relate to the frequency of visit with Rural East (higher visitation rates) the highest of the rural areas in terms of the proportion considering the centre 'safe' during the daytime. Rural West, with the lowest visitation rates, has the lowest proportion (49%). During the daytime the proportion who feel 'unsafe' reflects this pattern, with Hastings West and East 6% and 9% respectively and the Others between 13% and 17%. Overall the scores during the daytime are good and most people feel safe.

5.21 The pattern during the evening is very different, Hastings East and West have the highest proportion who feel safe but the figures are down to 15% and 12% respectively. These figures are higher than those for the other areas, which range from 5% to 8%. The contrast with the daytime situation is that a higher proportion of people from areas where the usage rates are highest - Hastings East and West and Rural East - feel unsafe at night than is the case with the other areas. The Hastings mean scores are higher though which could suggest more polarised opinions in Hastings, those who do not think it is safe think it is very safe

5.22 The daytime mean scores range from 3.40 to 3.87 whilst the night time scores range from 1.94 to 2.29 (index maximum 5.0). The perceptions of those actually using the town centre are picked up in the On-Street Survey which we consider below.

5.23 All respondents in the Study Area were asked which their preferred centre for leisure activities was. The results are shown below.

Table 75: Preferred centre for Leisure Activities 2005

Preferred Centre	No Households	%
Hastings	387	43.6
St Leonards	5	0.6
Silverhill	2	0.2
Eastbourne	201	22.7
Bexhill	164	18.5
Tunbridge Wells	37	4.2
Rye	24	2.7
Brighton	15	1.7
Tenterden	10	1.1
Ashford	7	0.8
Battle	6	0.7
Cranbrook	6	0.7
London	3	0.3
Hailsham	3	0.3
Peasmarsh	2	0.2
Glynde Gap	2	0.2
Other	13	1.5
TOTAL	887	100.0
Don't Know	113	

Source: Telephone survey

5.24 Hastings was the preferred destination for the largest number in the Study Area with 43.6% of those expressing a preference. Small numbers also suggested St Leonards (0.6%) and Silverhill (0.2%) in Hastings. Eastbourne (22.7%), Bexhill (18.5%) with Hastings account for nearly 85% of households' preferred destinations. Eastbourne is clearly the biggest attractor outside the Study Area. The other large towns are as follows:-

- Tunbridge Wells (4.2%)
- Brighton (1.7%)
- London (0.8%), and
- Ashford (0.3%)

On-Street Survey Analysis

5.25 On-street surveys were conducted at four agreed points in Hastings town centre (including inside Priory Meadow) on 16 April 2005 and throughout the following week. The interviews were spread throughout the day to provide a good cross-section of town centre visitors. A copy of the questionnaire is attached at Appendix 3 to this report. A sample of 286 respondents aged 15 and over was selected with quotas applied to age and gender to reflect the broad demographic characteristics of the area.

5.26 The intention of the survey was to provide further information on town centre uses, to assess visitor patterns and to elicit the views of those using the centre. An analysis of the information is presented below.

Frequency of Visit

5.27 Of those people questioned, 24% visited Hastings town centre on a daily basis, 33% visited more than once a week and 20% visited weekly. As such, over the course of a week 77% of those surveyed would expect to visit the town centre at least once.

Table 76: Frequency of Visit

Frequency of Visit	Percentage of Respondents	Number of Respondents
Daily	24%	70
More than once a week	33%	93
Once a week	20%	58
Less than once a week more than once a month	9%	25
Once a month	4%	12
Less than once a month	7%	19
First visit	3%	9
Totals	**100%**	**286**

Source: On-Street Survey

First Time Visitors

5.28 In relation to trade derived from visitors to the town centre, a total of 9 people (3% of the sample) stated that it was their first visit to Hastings. Of these, a third were sightseeing in the town, with an additional 11% (one individual) holidaying in or around Hastings. Of those first time visitors over half stated that their first impression of Hastings town centre was that it was 'good' with only one respondent describing the centre as 'poor'. It would be expected that the number of visitors to the town centre would have increased substantially had the survey been undertaken during the summer months when holiday/ visitor trade would be at its peak.

Purpose of the Visit

5.29 82% of those questioned who had previously visited Hastings were visiting the centre for shopping purposes, followed by 25% who required financial services and 21% who intended to eat whilst in the centre (clearly multiple answers were allowed). This highlights the principal role of the town centre as retail with ancillary elements of eating and drinking and financial services. The lack of entertainment options within the town centre was apparent with only 1% of those questioned visiting Hastings town centre for entertainment purposes, such as the cinema.

Table 77: Purpose of Visit

Purpose of Visit	Percentage of Respondents	Number of Respondents
Shopping	82%	227
Financial Service	25%	69
Other Service	3%	7
Eating	21%	58
Entertainment / Leisure	1%	4
Sight Seeing	2%	6
Business Visit	2%	6
Social Visit	7%	19
Educational	9%	26
Other	3%	8

Source: On-Street Survey

Town Centre Approval Ratings

5.30 In relation to the retail provision provided within Hastings town centre, 53% of respondents rated it as good or average. Only 22 respondents (10%) had a negative view of retailing within Hastings as an activity rating it ‘poor’ or ‘very poor’. Financial facilities within the town centre are seen as well provided for with nearly half of those questioned rating banking services as ‘good’ and no-one considering them to be ‘very poor’. Other professional services such as estate agents were also viewed positively with 57% of respondents rating them as ‘excellent’. This may be due to the relatively high concentration of estate agents premises located along the length of Havelock Road.

5.31 In addition to retail provision, respondents were also asked to rate activities that provided entertainment value within the town centre. Eating establishments are viewed by the majority of those questioned as ‘good’ (43%) or ‘excellent’ (17%) with only a relatively small number (7%) identifying eating provision within the centre as ‘poor’ or ‘very poor’. Due to the small number of people who were visiting the centre for an entertainment purpose the data regarding the rating of such activities is limited to a small sample (4 people) however, conclusions can be drawn as to the under provision of entertainment facilities within the town centre due to the small number of people questioned who were visiting the town centre for this purpose.

Table 78: Town Centre Approval Ratings

Purpose of Visit	Number of Respondents	Activity Rating: Very Poor	Activity Rating: Poor	Activity Rating: Average	Activity Rating: Good	Activity Rating: Excellent	Mean Score
Shopping	223	4%	6%	36%	39%	14%	3.5
Financial Service	65	0%	6%	19%	41%	29%	4.0
Other Service	7	0%	0%	14%	29%	57%	4.4
Eating	50	2%	5%	19%	43%	17%	3.8
Entertainment / Leisure	4	25%	0%	0%	50%	25%	3.5
Sight Seeing	4	0%	0%	17%	0%	50%	4.5

Source: On-Street Survey

Method of Travel to Town Centre

5.32 Of those questioned (286 people) roughly half (48%) had travelled into the town centre using their private car, 21% had travelled by public transport whilst 27% had walked. These results emphasise the importance of adequate car parking facilities within Hastings town centre to cater for those people who drive into the centre. The importance of the Priory Meadow car park is particularly relevant with over half of those travelling into the centre by private vehicle choosing to park there. A review of private car parking facilities may also be necessary with both Morrisons (8%) and ESK (5%) providing spaces 15% parked on-street. In addition, the relatively high proportion of people who walk into the town centre suggests that in terms of its customer base the centre draws upon a high proportion of localised trade.

In relation to car parking within the town centre there exists a general split with 26% of those questioned dissatisfied with existing provision and 27% satisfied.

Table 79: Method of Travel to Town Centre

Method of Transport	No	%	Supplementary Questions			
Train	12	4				
Bus	50	17	Was stop convenient?	Yes No	48 2	96% 4%
					50	**100%**
Car	136	48	Car park used:			
			Priory Street		4	3%
			Priory Meadow		73	54%
			Morrisons		11	8%
			ESK		7	5%
			British Rail		5	4%
			On-street		21	15%
			Other car parks		10	7%
			Other		2	2%
			Dropped-off		3	2%
					136	**100%**
Motorcycle	1	1				
Bicycle	6	2	Where Parked:			
			Priory Meadow		4	67%
			Seafront		1	16%
			N/k		1	16%
					6	**100%**
Walk	78	27				
Taxi	3	1				
Total	**286**	**100**				

Source: KF

Public Transport

5.33 In relation to the quality of the services offered by public transport in Hastings there is a relatively even spread provided by the respondents. An approval rating of 3.0 (mean score) is the mid-point satisfied rating. At the extremes, 11% of those questioned were not at all satisfied with public transport provision, whilst 10% were very satisfied. The average score overall at 3.1 is just on the positive side of "satisfied". The largest proportion of respondents did not regularly use public transport (31%) and as such had no view regarding the quality of the service. It is interesting to note that approval ratings were highest amongst those who had used it to travel to the town centre, and lowest amongst taxi users (based on a small number of users).

Table 80: Ratings for Public Transport

	Method of Transport Used							Total	
	Train	**Bus**	**Car**	**M/cycle**	**Bicycle**	**Walk**	**Taxi**	**No**	**%**
Not at all satisfied	1	4	14	-	1	9	2	32	11
2	3	2	15	-	1	12	1	34	12
3	2	15	14	-	1	13	-	45	16
4	2	18	17	-	1	20	-	57	20
Very satisfied	4	11	5	-	-	10	-	30	10
Don't Know	-	-	71	1	2	14	-	88	31
Total	**12**	**50**	**136**	**1**	**6**	**78**	**3**	**286**	**100**
Mean Score	**3.4**	**3.6**	**2.8**	**-**	**2.5**	**3.2**	**1.3**	**3.1**	

Source: On-street survey

Town Centre Improvements

5.34 Some 56% of those questioned consider that Hastings town centre could be improved as a shopping destination, compared to 40% who believe that it is acceptable as it currently exists. In relation to specific improvements that could be made to shopping in Hastings the vast majority of respondents (77%) believe that the centre needs to improve the range of shops on offer, followed by 19% who would like to see an improvement in parking provision.

Table 81: Suggested Improvements to Town Centre

Town Centre Improvements	Percentage of Respondents	Number of Respondents
Improved range of shops	77%	123
Better parking	19%	31
Tidier streets	8%	12
Improved appearance	2%	3
More toilets	2%	3
Improved transport	2%	3
Improved access	3%	4
Other	6%	10

Source: On-street survey

Range of Shops

5.35 Of those who wish to see an improved range of shops, 25% wish to see a greater choice of clothes shops, 11% would like to see a greater range of shoe shops and 11% would like to see more independently owned shops with a further 7% referring specifically to independently owned food shops. There appears to be an identifiable gap in fashion retailing within the town centre combined with a general desire for greater variety and better quality. Only 3% of those questioned considered there to be a need for additional restaurants or coffee shops.

Table 82: Improvements to Range of Shops

Improvements sought to range of Shops	Percentage of Respondents	Number of Respondents
More overall variety	41%	50
Better quality / upmarket shops	12%	15
Clothes shops	25%	31
Independent food shops	7%	9
Shoe shops	11%	13
Independent shops	11%	14
Electrical shops	2%	3
Childrens shops	6%	7
Book shops	2%	3
Gift shops	2%	2
Department stores	9%	11
Restaurants	2%	2
Coffee shops	1%	1
Other	7%	8

Source: On-street survey

5.36 In relation to non-A1 retail uses such as financial services and food and drink establishments, the vast majority of respondents (74%) thought Hastings town centre was well provided for as it currently exists. Although well provided for in relation to restaurant and café uses, some concern was raised as to the quality of the existing establishments. For example, 31% of respondents wished to see an increase in the quality of restaurants whilst 27% would like to see more choice in relation to the type of food served. These numbers relate to relatively small numbers of respondents.

Table 83: Improvements to Non-Retail Service

Improvements sought to Retail Services	Percentage of Respondents	Number of Respondents
Improve service range	58%	26
Better restaurants	31%	8
Improved restaurant choice	27%	7
More English restaurants	12%	3
More coffee shops	12%	3
Less take-aways	12%	3
Cleaner restaurants	4%	1
Cleaner centre	4%	1
Other	8%	2

Source: On-street survey

5.37 The majority of respondents (69%) are satisfied or very satisfied with the existing opening hours of the shops within the town centre with only 8% rated as dissatisfied. Once again there exists a general satisfaction with non A1 retail uses within Hastings town centre (estate agents, travel agents, restaurants etc) with 76% of respondents "satisfied" or "very satisfied" and none "not at all satisfied". Another aspect of the town centre is the evening economy in relation to eating, drinking and leisure activities.

Evening Activities

5.38 Respondents asked to rate evening activities gave an overall rating of 3.0, which is the mid-point "satisfactory" rating. 22% rated it lower than 3.0 and 25% rated it higher. Table 84 below shows rating by age group. This shows that the younger group - less than 29 - had the lowest level of "don't knows" (18%), reinforcing the view that younger people have higher "evening economy" participation rates and a mean score of 3.2 was given by that group. The over 70s gave a higher score (3.6) but there were 76% "don't knows" in that group, indicating that many over 70s do not participate in the evening economy.

Table 84: Attitudes to Evening Economy

	Age Groups									
	Less than 29		30-49		50-60		70+		Total	
	No	**%**	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**
1 Not at all satisfied	5	7	11	13	9	10	-	-	25	9
2	16	22	11	11	11	12	1	3	38	13
3	12	16	14	16	14	16	4	11	44	15
4	19	26	18	21	13	15	2	5	52	18
5 Very Satisfied	8	11	5	6	5	6	2	5	20	7
Don't Know	13	18	29	33	37	42	28	76	107	37
Total	**73**	**100**	**87**	**100**	**89**	**100**	**37**	**100**	**286**	**100**
Mean Score	**3.2**		**2.9**		**2.9**		**3.6**		**3.0**	

Source: On-street survey

Aesthetic Quality

5.39 When asked about the appearance of buildings in the town centre, 61% of respondents said they were satisfied or very satisfied. Only 4% of those questioned were not at all satisfied which suggests that there is a high level of satisfaction in the appearance of buildings in the town centre. The appearance of the street scene is also well regarded with 56% of respondents satisfied or very satisfied and only 4% not at all satisfied. Taking into account both aspects it can be concluded that overall the general appearance of the town centre is perceived positively with mean scores of 3.6 and 3.5.

Table 85: Attitudes to Aesthetic Quality

	Appearance of Buildings		Appearance of Streets	
	No	**%**	**No**	**%**
1 Not at all satisfied	12	4	12	4
2	23	8	37	13
3	73	26	75	26
4	129	45	121	42
5 Very satisfied	47	16	41	14
Don't Know	2	1	0	0
Total	**286**	**100**	**286**	**100**
Mean Score	**3.6**		**3.5**	

Source: On-street survey

Perceptions of Safety

5.40 The majority of people questioned feel safe visiting Hastings town centre during the day with 82% feeling safe or very safe. Conversely only 4% of respondents felt unsafe or not at all safe when visiting the centre - mean score 4.3. These results can be contrasted with perceptions of safety within the town centre during the evening. Only 19% of respondents feel safe or very safe whilst half feel unsafe or not at all safe. In general, perceptions of safety within the town centre contrast from a general feeling of safety which exists during the day to a feeling of concern during the evening - mean score 2.5.

Table 86: Perceptions of Safety

	During the day		During the evening	
Perceptions of Safety	**No**	**%**	**No**	**%**
1 Not at all satisfied	6	2	77	27
2	7	2	62	22
3	37	13	91	32
4	83	29	30	10
5 Very satisfied	153	53	26	9
Total	**286**	**100**	**286**	**100**
Mean Score	**4.3**		**2.5**	

Source: On-street survey

6.0 Town Centre Stakeholders' Views

6.1 During the course of this Study, a series of meetings were held with various stakeholders with interest in the Town Centre. This included representatives of the Borough Council; Sea Space, the Regeneration Body, and its consultants; Priory Meadows Management and a focus group meeting was held to which a number of interest groups, community groups and retailers were invited. This part of the report synthesises the opinions arising from those meetings.

Town Centre Focus Group

6.2 The focus group meeting was held on 30th March 2005, and despite the poor attendance, was informed and positive in terms of the comments and contributions that were made by all present. A note of the meeting is included in the Appendices volume but in the context of retailing, the discussion points are summarised below:

Strengths of Hastings Town Centre

6.3 Retailers believe that one of the strengths of the town centre lies in the attraction of the Priory Meadow Shopping Centre. This has acted as a catalyst for the development of new businesses. The town seems to have thrived on increasing competition in recent years and the arrival of Costa Coffee has spurred competition amongst local operators who have together created a coffee bar culture. The physical compactness of the centre was also considered to be an asset which is appreciated by shoppers.

6.4 The town centre is also considered to have a good balance of convenience and comparison shopping with the Morrisons Superstore reasonably accessible to town centre shoppers. Debenhams department store was considered to be an asset to the town. The premises were not ideal but it was felt that the local management coped very well with that difficulty and the store offered a good range of products.

Weaknesses of Hastings Town Centre

6.5 Whilst there was generally a feeling that the town centre was performing well, there were weaknesses in some areas that should be addressed to make Hastings a better place to shop. There were particular deficiencies in the fashion sector. More specialist retailers were required and existing retailers needed to improve their stock. Marks and Spencer was singled out as a store which failed to stock its upmarket range in Hastings and it was felt that the town centre would need to move upmarket in order to maintain or improve its market share. A new menswear shop in Trinity Street was considered to be very good and could stimulate that retail sector in the town centre.

6.6 Parking was considered to be a problem, particularly arising from overzealous traffic wardens. On street parking was considered to be preferred by shoppers and the council was urged to ensure that additional parking was considered in the new regeneration schemes. The former White Rock swimming pool was suggested as a new location for a car park.

6.7 It was thought that the appearance of Queens Road as an approach to the town centre gave a poor impression and needed to be improved. As a secondary shopping street it played an important part in the town but refurbishment was needed. There was potential for greater interaction between the town centre and the Morrisons store which could benefit the Queens Road area.

Other Issues

6.8 Generally speaking the quality of the town centre's pedestrianised areas was considered good. More could be done in respect of planting, fountains and public art. The Old Clock Tower was recalled and the potential for replacing it in the town centre was considered. One particular project was urged – to improve the uplighting of attractive buildings for example above Clarkes and Yates on Robertson Street.

6.9 Priory Meadow was important not simply because of its attraction to shoppers but also because of its role as a facilitator of promotion and training.

6.10 The incidence of visitor and tourism spend was considered briefly. Retailers considered that it provided a bonus but it was always necessary to base business on the regular local market as in non resort towns. There was a seasonal element to business but it was dominated by Christmas, Easter and the other retail peaks.

6.11 In considering perceptions of safety the view was that much had been done to tackle the problem. The Safer Hastings Partnership had put Street Wardens in place to deal with problems relating to drink and other initiatives, such as Bar Watch, Shop Watch and the extension of CCTV, were having an impact on the problem. It was understood that people's perception of crime problems in Hastings was improving – particularly amongst Hastings residents.

Other Stakeholder Views

6.12 A meeting with the Priory Meadow Management team was held on 8 February 2005 and they conveyed a very optimistic view of Hastings town centre in general and of Priory Meadow in particular. The owners were keen to invest in improvements to increase the amount of retail floor space because they were in a position now to choose their tenants reflecting high levels of retail interest in the centre. They were pursuing a policy of improving the tenant mix and had planning applications to reconfigure car parking and improve the amount of retail space. The site is however tightly constrained and there is a finite limit to the amount of development that could be achieved. The owners are dynamic and working with others to develop and expand Hastings as a retail destination.

6.13 Also on 8 February we met with Sea Space who explained the key elements of their proposals to regenerate the centre of Hastings. They identified the three key elements of the strategy for Hastings as:

- Station Plaza – A development of offices with some residential and a substantial new University Centre. Some retail at ground floor level in order to provide active street frontages.

- Priory Quarter – Still the subject of site assembly and still in design. Likely to provide some retail at ground floor level and with additional education development specifically a new Sixth Form College.

- Pelham Place - A Norman Foster tower including office floor space, some high quality residential, a boutique hotel, and ground floor commercial leisure and retail uses and basement car parking.

6.14 Sea Space did not consider that retail development should play a significant part in the regeneration proposals for Hastings where the emphasis ought to be on education and training and on the development of an office based economy. The view was expressed that the current amount of retail floor space was not sustainable and, as a consequence, retail uses would generally only be incorporated for urban design reasons – for example to ensure that active street frontages can provided – particularly in those projects where the permeability of the Town Centre was to be improved (for example Priory Quarter).

6.15 A meeting was held on 18 February 2005 with Rumney Design Consultants, the Sea Space design consultants. They were rather more positive about the design and development issues relating to retail development, particularly in respect of Priory Quarter and the ESK site on Cambridge Road.

Conclusions in respect of Stakeholders' Views

6.16 The key issues that have emerged from the meetings are as follows:

- General optimism about the role of Priory Meadow and its role at the heart of the Town Centre
- Limited capacity to intensify retail floor space at Priory Meadow
- The pedestrianisation has been implemented well – with potential for improvements in lighting and public art/ fountains
- View that Town Centre thrives on competition but has weaknesses in fashion and footwear sectors
- Town centre needs to try to position itself more upmarket - particularly in respect of the fashion sector
- Parking is an important aspect in the attractiveness of the centre and must be incorporated and improved in new developments. On-street parking, whilst popular with some retailers and shoppers, does not provide a solution to long term parking problems
- Minority view that existing level of retail floor space is not sustainable.

7.0 Town Centre Conclusions

7.1 Planning policy at all levels emphasises the importance of town centres for the location of new retail development. The retail capacity analysis in Part 3 of this report has identified substantial capacity for new floorspace. The town centre will be expected to play a major part in helping meet the identified retail needs.

The Role of Hastings Town Centre

7.2 Hastings is a sub-regional shopping centre competing with Eastbourne to the west, Tunbridge Wells to the north and Ashford to the north east. At present it ranks third amongst these towns in floorspace terms, fourth in terms of population and second in terms of retailer requirements.

7.3 Within the study area identified (see Plan 1) it is the major centre for clothes and shoes, furniture and carpets, small household goods and books, toys and sports goods. It is eclipsed by Ravenside Retail Park as the main centre for major electrical items (where the town centre is second) and DIY goods (where the town centre is third behind Ravenside and the Rye Road B&Q).

7.4 Its market share of comparison retail trade is very low in Bexhill and Rural West, where it competes with Eastbourne and Bexhill town centres. It has a substantial share of trade in Rural East and to a lesser extent Rural North, where it competes with Tunbridge Wells.

Retail Composition

7.5 Hastings has a good balance of floorspace in the main retail sectors with a good range of convenience stores and a reasonable proportion of comparison stores. The principal deficiencies compared to the UK average are in the clothing and footwear categories, surprisingly an area where it has a relatively high market share.

7.6 It has a good representation of national multiple retailers and includes one department store, Debenhams.

7.7 In national terms it is under-represented in terms of restaurants and financial services and over-represented in terms of estate agents. We believe the balance of restaurants and cafes has improved significantly in the past year. Hastings can be considered to have a good, well rounded retail offer with service support upon which to build, particularly in the fashion sector.

Attitudes to Hastings

7.8 The study considers the attitudes of residents in the study area to Hastings town centre. With the exception of Rural West, Hastings has good satisfaction scores in the study area. Hastings East, which has the highest number of town centre shoppers, has relatively low scores whereas Hastings West has the highest.

7.9 Amongst householders in the sub-area, the following attributes were rated, starting with the lowest levels of support:

- car parking [least favoured]
- public transport
- evening economy
- appearance of streets
- appearance of buildings

______________________ average score

- public facilities
- range of shops
- range of services
- opening hours [most favoured]

7.10 In terms of suggested improvements, general matters such as security, parking, street cleanliness and public transport were mentioned more than matters relating to shopping improvements though the individual reason with most mentions was "more shops - better range of shops".

7.11 Perceptions of households in the study area of public safety in Hastings town centre were higher for Hastings East and West, where usage rates are highest, and were generally diminished where usage rates are lower. Perceptions of safety at night were uniformly low, again diminishing in areas with lower usage.

7.12 Turning to the views of users of the town centre, approval ratings were substantially higher than amongst householders in the study area, and shopping was overwhelmingly the main reason for visiting (82%). Some 77% said they visited the town centre at least once a week, indicating a very loyal customer base.

7.13 Almost half of respondents had arrived by car, and Priory Meadow was the most frequently used car park. Over a quarter had walked to the town centre and almost 1/5th had used a bus.

7.14 Town centre users were much more vociferous in wanting to see an improved range of shops than were householders in the study area (77%), with better car parking being mentioned by 19% as the second most important town centre improvement. The types of improvements to the range of shops sought were more variety/more clothes shops/better quality shops/more independent shops and more shoe shops.

7.15 Satisfaction with Hastings town centre's evening economy was highest amongst the under 29 year olds, probably the ones with most experience of using it.

7.16 Perceptions of safety both during the day and at night were much higher amongst town centre users than was the case with householders. There was a substantial difference between perceptions of safety at night which was considered much less safe.

7.17 Hastings town centre has relatively high levels of satisfaction amongst households in the study area though satisfaction levels were higher, as might be expected, by town centre users. If the aim is, as it must be, to attract those who are not already frequent users to the town centre, their comments may provide an indication of what needs to be done to encourage them to change their shopping patterns. This does not of course mean that no significance is given to the views of town centre users - their continued loyalty is essential. Key issues are:

- security and the perceptions of public safety need to be improved. This may well be more of a promotional activity since we understand much has been done in this area already

- parking - respondents have claimed that more/better/cheaper or free parking would be a significant improvement. Whilst free parking is unlikely ever to be a viable option it is important to ensure that good, accessible parking is provided as part of the extension of the town centre offer

- more shops - people want to see a better range of shops with fashion and electrical goods particularly mentioned. The latter would appear to be a particular deficiency with strong competition from Ravenside Park. The smaller unit size of many electrical goods makes them particularly suitable for town centre locations.

7.18 In respect of the last issue (more/better shops), there is a limit to what the town planning system can do on its own. It can seek to ensure that appropriate sites are made available and can encourage the conditions that nurture retail change but eventually the market will decide what can be supported.

7.19 Key stakeholder views can be summarised as follows:

- general optimism about the role of Priory Meadow and its role at the heart of the Town Centre
- limited capacity to intensify retail floor space at Priory Meadow
- the pedestrianisation has been implemented well – with potential for improvements in lighting and public art/ fountains
- view that Town Centre thrives on competition but has weaknesses in fashion and footwear sectors
- town centre needs to try to position itself more upmarket - particularly in respect of the fashion sector
- parking is an important aspect in the attractiveness of the centre and must be incorporated and improved in new developments. On-street parking, whilst popular with some retailers and shoppers, does not provide a solution to long term parking problems
- minority view that existing level of retail floor space is not sustainable.

8.0 The Role of the Town Centre in Meeting Retail Needs

8.01 The town centre, as the focal point of retailing in the Borough and for large areas of its rural hinterland (particularly to the east and north), should be the focus for meeting large elements of the capacity identified in Part 3.

8.02 This was as follows:

Table 87: Summary of Net Retail Capacity

	Convenience (sq m net)	Non-bulky Comparison (sq m net)	Bulky comparison (sq m net)
2006	2222	-6405	55
2011	+467	+659	+2826
2016	+173	+6825	+2740
2021	0	+8181	+2633

Source: KF

8.03 We have commented that the capacity identified in the convenience sector reflects high levels of over-trading and a substantial draw of trade particularly from Rural East and Rural North. The construction of a supermarket at Rye, or one of the other lower order towns in the rural catchment, could reduce Hastings' market share in this sector and reduce the capacity identified. Some convenience floorspace could be provided in the town centre should a site become available but from a qualitative perspective, the town centre is quite well served with a range of convenience stores.

8.04 The 2006 "over supply" of non-bulky comparison goods floorspace reflects the implementation of current permissions and proposals for Priory Meadow extension and Station Plaza. Pelham Square is not included in our capacity analysis because it has not reached application stage.

8.05 The build-up of capacity following after 2006 means that it is appropriate for the Borough Council to be considering the location of an area upon which these retail needs can be met. This should be designed to come on stream between 2011 and 2016.

8.06 The bulky goods sector includes spending on electrical goods, furniture and carpets and DIY goods. These are frequently sold in a retail warehouse format but do not have to be. Hastings town centre performs well in market share terms in the furniture and carpets sector and electrical goods could be retailed from town centre premises if operators could be attracted. Ravenside Retail Park clearly has some pre-eminence in this sector.

8.07 The need identified for bulky goods floorspace could in part be accommodated on town centre sites. If it isn't there must be some question relating to the ability to find an appropriate large, flat site within the Borough boundary to accommodate around 2800 sq m net in each 5 year period. If any of the floorspace is provided on a town centre site, the likelihood is that the sales densities will be higher and therefore the amount of floorspace required will be less.

Existing Town Centre Boundary

8.08 There is clearly a need for retail sites to be found in and around the town centre. We first consider existing Local Plan boundaries and then look at potential development opportunity sites.

8.09 The existing Town Centre boundary, is defined by the Town Centre inset, of the Adopted Hastings Local Plan 2004. It runs from the Pier and White Rock pavilion in the south west to Breeds Place (but excluding Pelham Place) in the south east. The Town Centre inset boundary's most northern point is the area to the north of the railway bridge on Queens Road. From that point the eastern boundary broadly follows Stonefield Road and Castle Hill Road and the western boundary Braybrooke Road.

8.10 The Local Plan also defines a Core Shopping Area (CSA) which is shown on the Plan in the Technical Appendix Volume. This is a reasonably compact area which extends from Palace Court on White Rock up to Stonefield Place on to Queens Road. The Morrisons superstore lies just beyond the CSA. Priory Meadow and Queens Square are included with Wellington Place, Castle Street, Cambridge Road, Robertson Street, Trinity Street and Claremont. Havelock Street, with its concentration of A2 uses is largely excluded from the CSA.

8.11 Current Local Plan policy is permissive of new retail uses in the CSA and elsewhere in the Town Centre Inset Area is broadly permissive provided the development proposed contributes to or complements the vitality and viability of the CSA and meets the locational requirements of policy.

8.12 At present the Sea Space regeneration projects provide a real prospect for bringing forward new retail floor space. They have the means available to assemble land which can help to provide sites of sufficient scale to meet retailers demands for larger floor plates. It may be appropriate to consider enlarging the Town Centre Inset, and possibly the CSA, to include the Pelham Place development site. At present there are no other substantial areas of retail uses in the town Centre that warrant a review of the CSA.

Development Opportunity Sites

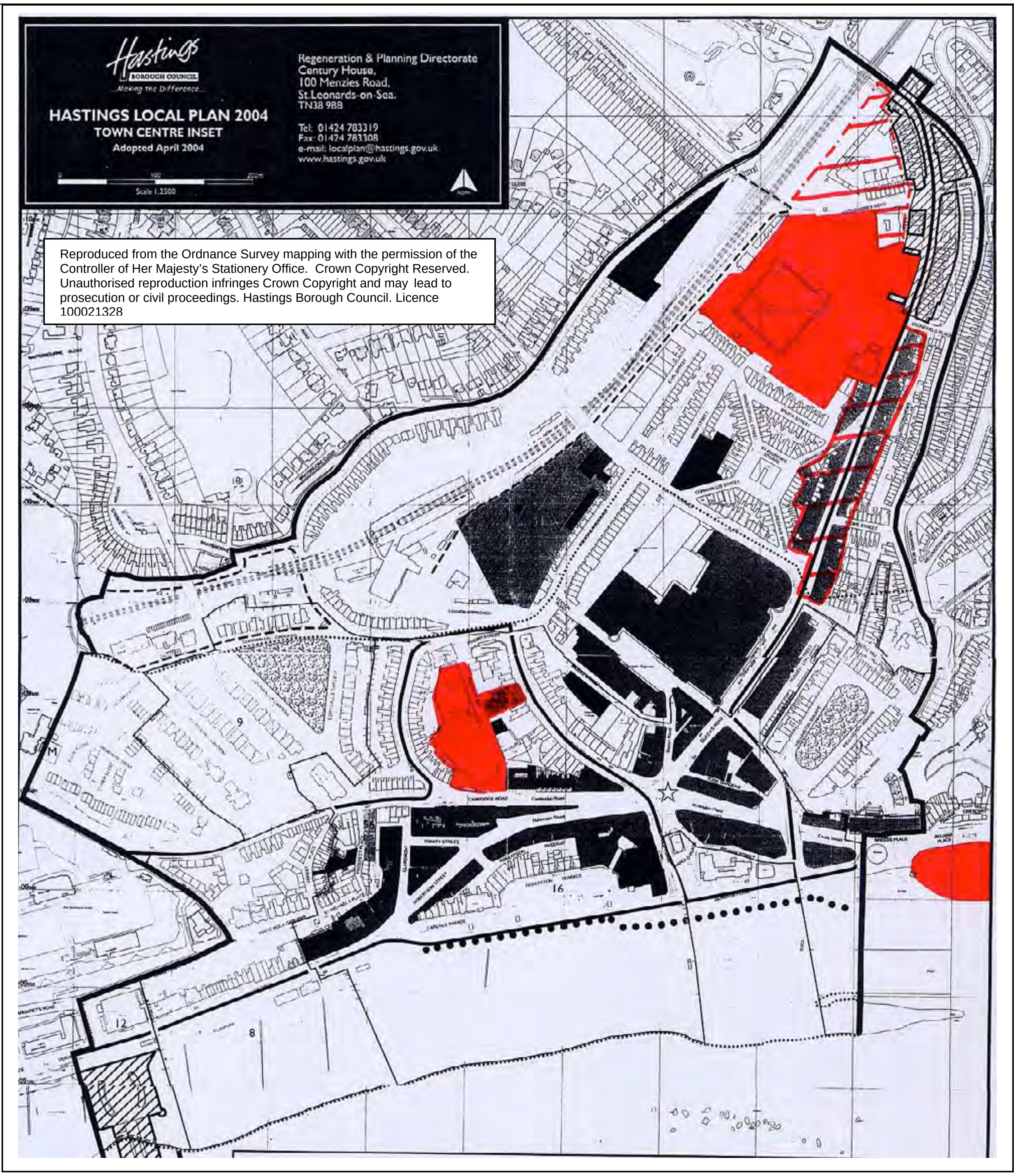
8.13 The compact and densely developed nature of the Town Centre and the CSA, with the existing road layouts and conservation area designations that apply to much of it, mean that retail development is likely to be limited to a relatively small number of individual retail sites that may become available. The Sea Space projects provide the main exception to this. Priory Quarter in particular may provide an opportunity to accommodate more retail development incorporating as it could two large sites, the Priory Street Car Park and the ESK site on Cambridge Road. Given anticipated retailer demand and the substantial growth in comparison goods expenditure over the study period, these sites could provide an important location for future shopping development. The Development Opportunity sites are shown on Plan 2.

8.14 Our discussions with Rumney Design Consultants indicated that the emerging Sea Space proposals for Priory Quarter were addressing the possibility of encouraging pedestrian flows through the creation of pedestrian routes from Priory Meadow at right angles to Middle Street, Havelock Road and Priory Street so that the development would integrate well with what are currently the main retail streets. This should serve to reinforce the centre as a whole rather than draw trade from it. The centre would remain relatively compact.

8.15 Elsewhere in the town centre, the proximity of residential development to the main retail areas can restrict the potential to intensify retail activities and landform is a further constraint. In a constrained centre like Hastings town centre, care will be needed to ensure that its retail growth and development is not unduly restricted but that those that are permitted have acceptable impacts on residential amenity.

8.16 It will be essential to engage with Sea Space to ensure that the few remaining sites which can potentially house large floorplate buildings are not lost from retail development. The potential to develop the upper floors for education and training and office purposes will not be lost enabling

Plan 2: Town Centre Development Opportunity Sites



Key:

Queens Road Refurbishment

Development Opportunity Sites

SeaSpace to achieve its objectives. The regenerative benefits of retail development - in terms of new jobs which we considered in Part 3, Section 8 - should not be ignored.

8.17 In the longer term, the Council may wish to consider developing the other major "single ownership" site adjacent to the town centre. The Morrisons' store occupies a site almost as large as Priory Meadow and, whilst at present this is very much an "edge of centre" store, it could in the longer term be developed more intensively, incorporating the large convenience store with unit shops and a multi-storey car park. We have not examined this site in detail but there may be opportunities to extend the site by acquiring other ownerships. We understand the land to the north (shown with a red hatching on Plan 2) is in Council ownership. If available this would help create a larger development site. The scheme would provide an opportunity to upgrade Queens Road and reinforce its retail role. A refurbished Queens Road would help to integrate the new scheme into the town centre.

8.18 A town centre extension along Queens Road would result in a much less compact town centre, but with retail capacity in the comparison sector growing at current rates such an extension provides a long term solution that would be policy compliant.

Appendix 1
Policy Background

Background

1.0 Government Planning Guidance

PPS6:

1.1 Planning Policy Statement 6 (PPS 6) entitled ‘Planning for Town Centres’ and published in 2005 replaces Revised Policy Guidance Note 6 (PPG 6) ‘Town Centres and Retail Developments’.

1.2 PPS6 explicitly considers planning policy issues associated with town centres and the primary uses contained within such centres. Such considerations should be placed within the context of the Government’s key objective for town centres which is to promote their viability and vitality by:

- planning for growth and development of existing centres; and
- promoting and enhancing existing centres by focusing development in such centres and encouraging a wide range of services in a good environment which is acceptable to all.

1.3 Such a broad key objective will be supported and supplemented by a variety of associated policy aims which include socially based targets surrounding social exclusion and accessibility in addition to a variety of economically focused objectives such as improving consumer choice and the promotion of deprived areas.

1.4 In order for Local Authorities to implement adequately the Government’s policy objectives for town centres, as summarised above, para 16 outlines a variety of key targets that LA’s should adopt. These include developing a hierarchy and network of centres, assessing the need and capacity for extended principal town centre uses, identification of future development sites, the promotion of town centre management and proactive partnerships and finally, the development of an effective system of policy monitoring and review.

1.5 Para 2.1 states that in order to deliver the central objective of PPS 6, namely, the promotion of viable and vital town centres, development should be focused in existing centres thus strengthening and, if necessary, regenerating them. In the context of Hastings this would locate the majority of development in Hastings Town Centre and the district / local / speciality centres of St Leonards, Bohemia, Ore, Silverhill and Old Town.

1.6 LPAs should pro-actively facilitate growth and change in such centres during the preparation of their Local Development Framework (LDF) and more general Development Plan Documents. PPS 6 identifies three key means for achieving this. The first envisages Local Authorities selecting appropriate existing centres which have the ability to accommodate identified growth through both the extension of the boundaries of the defined centre and the improvement / intensification of existing land and buildings which currently exist within the centre. The second requirement advocates the management of existing centres in order to promote or develop a specific role for that centre such as specialist or niche trading. The final aim concerns planning for new centres of an appropriate scale in areas which are either experiencing significant growth or areas where there exists identified deficiencies.

1.7 Para 2.4 further clarifies the central government policy context by ascertaining that where possible growth should be accommodated within existing centres through the more efficient use of land especially in terms of encouraging development that secures higher densities. In addition LPAs should identify any sites within existing centres that are, or may, become available for development or redevelopment including the active encouragement of unit conversions or changes of use. Where expansion or (re)development cannot be accommodated within existing centres a sequential approach should be taken whereby LPAs should allow for the extension of designated primary shopping areas or the town centre retail boundary as a whole. Such extensions to existing centres should be integrated considerately into established centres in terms of uses, design and environmental impact

1.8 In specific relation to the study, a consideration of the Government's stance with regard to retail policy in centres perceived to be in decline is particularly relevant. Para 2.8 considers such declining centres and states that LPAs should attempt to strengthen and consolidate these centres through promoting a diversification of uses and wider range of services in addition to improving the centres environmental quality. However, where such decline does not appear to be reversible the LA should consider reclassifying such centres at a lower level within the hierarchy of retail centres. Within Hastings this may see centres declassified from District Centres to Local Centres. In considering the development of such retail hierarchies the LPA should aim to:

- avoid an over-concentration of growth in higher level centres;
- facilitate investment and growth required to strengthen other centres; and
- actively designate new centres or promotion/demotion of existing centres.

1.9 Para 2.16 outlines a variety of measures the LPA must undertake during the preparation of their Development Plan Documents and more specifically their core strategy. These include:

- an assessment of the need for additional floor space for main town centre uses;
- the identification of deficiencies in provision and the capacity for existing centres to accommodate new development;
- the identification of centres where future development may be focused;
- the identification of primary and secondary shopping areas / frontages;
- the identification and allocation of (re)development sites;

- a review of existing allocations and the reallocation of such sites if considered appropriate;
- the development of spatial policies / proposals in order to facilitate investment, growth and improved access in existing centres; and
- the production of a series of criteria-based policies for assessing and locating new development proposals.

1.10 A diversity of uses within a centre provides an important contribution in terms of sustaining / promoting the vitality and viability of the centre. As such, LPAs should actively encourage a diversification of uses within town centres as a whole ensuring that tourism, leisure and cultural activities are dispersed throughout the centre. Para 2.23 goes on to consider town centre diversification in specific reference to the ‘night time economy’ and states that in drawing up their policies for town centre uses LPAs should consider not only the scale and distribution of leisure uses they wish to accommodate but also actively plan for the cumulative impact of such developments in relation to crime, environmental impacts and night-time public transport provision.

1.11 PPS6 sets out five principal considerations that Local Authorities should employ when selecting sites for development. The first of these requires an assessment of the need for such a development to be undertaken. This may take the form of a quantitative assessment using existing / forecasted population levels, existing / forecasted goods expenditure or forecasted improvements in the productivity of floor space use. Alternatively, the assessment may take the form of a qualitative need survey considering the distribution of future development, the possibility of accessibility improvements or the provision of a range of sites for shopping, leisure and local services.

1.12 The second requirement concerns the identification of an appropriate scale of development. As such when selecting suitable sites for development LPAs should ensure that the scale of any envisaged or proposed development directly relates to the function and role of the centre in which it is proposed to be located. This approach will allow any new development to be easily incorporated into its existing centre thus complementing its role and function. The third consideration proposes the application of a sequential test to the process of site selection. Such a test ensures that all options within the retail centre are considered before peripheral sites are proposed for development.

1.13 The fourth requirement contained within PPS 6 in relation to site selection and land assembly concerns assessing the potential impact of any proposed / envisaged future development sites. Para 2.48 states that in relation to existing centres the benefits of development sites are likely to be greatest where such development can take place directly in an existing centre. Where a site is proposed to be allocated in an edge or out-of-centre location LPAs should assess the impact the development would have on established centres within the proposed developments perceived catchment. Finally, target number five seeks to ensure that proposed locations are accessible in terms of reducing the need to travel (especially by private car) and the associated promotion of public transport, walking and cycling. Employment, retail, leisure and tourist facilities should therefore be located in town centres wherever possible thus taking full advantage of existing and established public transport provision. In addition to the above criteria LPAs may also taken into consideration issues surrounding regeneration, employment, economic growth and social inclusion when allocating / considering sites for development.

PPG 13 – Transport

1.14 PPG13 'Transport' was published on 11th October 2002. The broad objectives of PPG 13 are to integrate planning and transport at the national, regional, strategic and local level in order to:

- promote more sustainable transport choices for both people and for moving freight;
- promote accessibility to jobs, shopping, leisure facilities and services by public transport, walking and cycling, and
- reduce the need to travel, especially by car.

1.15 In order to actively achieve such objectives the guidance states that when LA's are preparing their development plans they should aim to achieve a variety of specific aims. These include actively managing the pattern of urban growth in order to focus major generators of travel demand in city, town and district centres, locating day to day facilities in local centres so they are accessible to their clientele by walking and cycling, ensuring that development comprising jobs, shopping, leisure and services offers a choice of access by public transport, walking and cycling; and using parking policies to promote sustainable transport choices thus reducing reliance on the car for work and other journeys.

1.16 Para 19 argues that a key planning objective is to ensure that jobs, shopping, leisure and service facilities are accessible by public transport, walking and cycling. Particular emphasis should be provided to questions of accessibility when LA's are identifying preferred sites for future development in order to ensure that such sites will offer realistic, safe and easy access by a range of transport, not exclusively by car.

1.17 During the process of development plan preparation LA's should ensure that their strategies on parking, traffic and demand management are consistent with their overall strategy on planning and transport. In developing such a strategy LA's should:

1) focus land uses which are major generators of travel demand in city, town and district centres which should be generally preferred over out of centre transport interchanges;

2) actively manage the pattern of urban growth and the location of major travel generating development to make the fullest use of public transport.

3) take into account the potential for changing overall travel patterns;

4) locate day to day facilities such as convenience shops close to their clientele and adopting measures to ensure safe and easy access, particularly by walking and cycling.

1.18 Para 35 explicitly considers the role of transport policy in achieving the overall aim, as contained within PPS 6, of maintaining the vitality and viability of town centres:

> "Policies for retail and leisure should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. At the regional and strategic level, local authorities should establish a hierarchy of town centres, taking account of accessibility by public transport, to identify preferred locations for major retail and leisure investment. At the local level, preference should be given to town centre sites, followed by edge of centre and, only then, out of centre sites in locations which are (or will be) well served by public transport. Where there is a clearly established need for such development and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out of centre developments, provided that improvements to public transport can be negotiated".

2.0 Regional Policy Guidance

2.1 The relevant Regional Policy Guidance (RPG) for Hastings is RPG 9 entitled 'Regional Planning Guidance for the South East' which was adopted in March 2001 and is intended to cover the period up to 2016. The primary purpose of the guidance is to provide a regional framework for the preparation of Local Authority Development Plans in addition to providing a spatial framework for other strategies and programmes.

2.2 RPG9 identifies 12 key principles which should provide the basis for future development within the south east region. In the specific context of Hastings and the retail study, principle 1 states that urban areas should be the main focus for development, making them more attractive, accessible and better able to attract investment. For this aim to be successfully achieved a vibrant and vital retail centre should be facilitated, encouraged and maintained allowing the centre to attract and sustain future development thus adding to the quality of the urban fabric as a whole. Key principle 11 further emphasises the importance of central retail areas by stressing that access to jobs, services, leisure and cultural facilities should be less dependant on longer distance movement with an associated reduced reliance on the car.

2.3 A key feature of RPG 9 in relation to the key principles outlined above concerns the attempt to foster an 'urban renaissance' within urban centres through the concentration of future development in urban areas and the economic / sustainable use of land. In explicit reference to town centres para 3.10 argues that town centres should be the normal focus of retailing and services requiring accessibility by large numbers of people. A concerted focus upon the design and management of the urban environment, especially in relation to central retail elements, will foster the physical and environmental improvements of towns and cities in the south east thus making them more attractive places to live, work and engage in cultural and leisure activities.

2.4 Hastings as a 'Sussex Coastal Town' is designated by RPG 9 as a 'Priority Area for Economic Regeneration' (PAER). Such areas are categorised as suffering from a variety of social, cultural, economic and environmental problems such as above average employment, high levels of social deprivation, low skill levels and geographical peripherality. Hastings has been specifically identified as an Objective 2 Area under European Regional Policy rendering it eligible for a variety of European Structural Funds.

2.5 From Para 5.12 RPG 9 adopts a specific retail focus in relation to ensuring the vitality and viability of existing town and local centres. It acknowledges that a combination of economic recession and the diversion of investment to out-of-centre shopping locations has led to a strategic need to focus future investment and development in existing town centre locations.

2.6 Policy Q5 states that:

> "The region's existing network of larger town centres should be the focus for major retail, leisure and office developments, to support an urban renaissance, promote social exclusion and encourage more sustainable patterns of development".

2.7 In order to achieve such an aim Local Authorities within the process of preparing their Development Plans should assess the need for additional retail within their area, identify which town and district centres should be the preferred locations for growth and apply the sequential test as outlined in PPS 6 (and expanded upon in the above section) to identify sites for retail, leisure and office development.

Draft South East Plan 2005

2.8 The South East Plan is intended to replace Regional Planning Guidance 9 (RPG 9) as the South East's Regional Spatial Strategy (RSS). The consultation draft of the document was published in January 2005 and is expected to receive Government approval for adoption in 2006.

2.9 One of the principal considerations contained within the draft South East Plan concerns the relationship between identified town centres and their adjoining regions, especially Greater London. Such a focus clarifies the importance of improving public transport links to and from Hastings (especially trains serving London) in order to ensure and sustain the future health and competitiveness of Hastings and its surrounding area.

2.10 Policy TC2 envisages the creation of a 'Regional Network' of town centres, of which Hastings is identified as one, which should be the focus for major retail developments, uses which attract large numbers of people and large scale leisure and office developments. The role and development of Hastings Town Centre is not viewed by the South East Plan as occurring in isolation but instead forms part of a wider network of accessible, attractive and vibrant town centres which interact with and complement each other, within the South East region as a whole.

2.11 New development and redevelopment in town centres as outlined by policy TC3, should be guided by the following considerations:

- (i) The proportion of total retail expenditure accommodated within the town centres contained within the Regional Network should be greater than in any of the other centres;
- (ii) The town centres in the Regional Network should be the prime focus for large scale leisure, office and cultural developments;
- (iii) Local Authorities should ensure that centres are supported and enhanced and that the scale and nature of any new development in a centre is appropriate, and;
- (iv) Local Authorities should identify and develop strategies for smaller centres to meet needs for quality local shopping, local businesses and appropriate leisure and cultural developments in partnership with other agencies.

2.12 The South East Plan reiterates the policy guidance contained within PPS6 (see above) with regard to the adoption of a sequential approach when selecting appropriate sites for allocation within town centres. In order to identify appropriate sites Local Authorities should work with Town Centre Management Partnerships to develop a vision for the town centre drawing upon both the function and character of the centre. Such an approach is intended to contribute to the overall strengthening of the town centres wider role through the promotion of urban regeneration, quality urban design, improved public transport access and a holistic safe and attractive environment.

2.13 Policy TC5 identifies the specific importance of the retail sector to the identified Regional Network of town centres as envisaged by the South East Plan. Major new retail development should be targeted to these main centres taking into account considerations such as the need to support the town centres viability and capacity to accommodate both change and growth, the need to respect the environmental / cultural value of existing town centres, where new investment should be targeted / promoted and finally, the potential impact on the vitality and viability of nearby town centres.

3.0 East Sussex and Brighton and Hove Structure Plan 1999

3.1 The East Sussex and Brighton and Hove Structure Plan was adopted in December 1999 providing a framework for the area until 2011. It has been jointly produced by East Sussex County Council and Brighton and Hove City Council. The overall aim of the Structure Plan is defined as seeking a more environmentally sustainable future for the County and to meet the needs for development and change in a manner that is more sustainable in the longer term.

3.2 In specific relation to town centres and retailing a strategy of regeneration of towns through integrated measures to improve economic, environmental and social well-being which includes transport improvements to provide better access to facilities by means other than the private car has been proscribed. Attention should also be focused upon the development and enhancement of town centre environments as places to live, work, shop, visit and access services.

3.3 Chapter 8 of the Structure Plan considers retail policies with the principal aim being to:

> "Safeguard the vitality and viability of existing shopping centres, allowing these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form. It is also an aim to make provision for new forms of retailing which increase the range and quality of shopping opportunities for consumers".

3.4 Policy SH1 states that in urban areas (in the context of the study this relates to Hastings and St Leonards) proposals within existing main shopping centres will be supported where they maintain and enhance the vitality and viability of existing retail units. Only if it can be demonstrated that suitable sites are not available within the centre should retail proposals on the edge of main shopping centres be considered. The policy also seeks to strengthen the role of Hastings as a sub-regional centre with policies for the centre placing a strong emphasis on improving the range and quality of shopping and other facilities.

> "Support will be given to proposals within or on the edge of existing main shopping centres in urban areas which maintain and enhance their vitality and viability, and are in areas with good accessibility by a choice of means of transport, including public transport, walking and cycling. This support would include proposals providing:
>
> (a) an increase in the range and quality of shops;
> (b) an adequate supply of larger shop units, where appropriate, but particularly in central Brighton, Eastbourne town centre and Hastings town centre;
> (c) a strengthening of the hierarchical role of Brighton as the key regional shopping centre, and Eastbourne and Hastings as the two key sub-regional shopping centres in the plan area."

3.5 Policy SH2 allows for the introduction of pro-active policies and proposals which improve the attractiveness of existing shopping centres as locations for retail activity. Para 8.11 states that Local Plans should include positive measures to enhance the vitality and viability of existing centres through the improvement of existing sites, vacant sites and existing infrastructure. Within larger centres such as Hastings it may be appropriate to produce integrated town centre strategies and action plans. The policy states:

> "Local Plans should include policies to maintain and enhance the role of existing shopping centres based on assessments of vitality and viability, future needs and the capacity for further retail development. Local plans should identify needs for positive programmes of improvement for existing main shopping centres including, where appropriate:
>
> (a) the identification of suitable sites for development; and
> (b) town centre strategies and management schemes."

4.0 Hastings Local Plan 2004

4.1 The Hastings Local Plan was adopted in April 2004 and is intended to cover the period up to 2011. The plan supersedes the two existing Local Plans that covered the area, namely the Hastings Borough Plan (adopted 1993) and the Combe Haven Valley District Plan (adopted 1983).

4.2 Hastings Borough Council have identified six key strategies which form the basis of the Local Plan. With specific reference to the town centre the Council aim to:

- improve Hastings town centre for the benefit of residents, businesses and visitors;
- strengthen other centres by improving the environment and encouraging retailing and other businesses; and
- preventing large scale retailing outside existing centres.

4.3 Section 5c of the Hastings Local Plan 2004 outlines the Council's retail policies for the Borough. In order to present an initial introduction to Hastings town centre the Council acknowledge that the impact of out of town and out of centre shopping combined with strong competition from neighbouring centres such as Eastbourne, Tunbridge Wells and Brighton has had the cumulative effect of disadvantaging Hastings town centre in terms of retail provision and performance. However, it is accepted that the development of the Priory Meadow shopping centre in 1997 has led to an improvement in the performance and perception of the town centre.

4.4 HBC have developed a shopping centre hierarchy in line with PPS / RPG guidance which is as follows:

- Hastings Town Centre – sub-regional centre
- St Leonards (including Marine Court) – district / speciality centre
- Old Town – speciality / local centre
- Silverhill – district centre
- Ore – district centre
- Bohemia – local / speciality centre

4.5 Four additional local centres have also been identified which fall outside the remit of the study. Each of the centres highlighted above will be considered within the context of the Councils shopping strategy as outlined in para 5.88 which states that the Local Plan will aim to pursue a number of core principles with regard to retail. These include prioritising actions which support Hastings town centre, encourage a wide variety of land uses and activities in the town centre, seek continuing investment in the town centre, resist retail proposals which would threaten the viability and vitality of the centres, support district / local centres and finally, promote actions which improve the environment, traffic management, safety and access in all the main centres.

4.6 Hastings town centre is the largest shopping centre in the Borough with a total retail floor space of approximately 93,000 sq m of which 28,000 sq m is contained within Priory Meadow shopping centre. The central aim of HBC with regard to the town centre is to bring about a completed programme of regeneration for the town centre to enable it to fulfil and meet its role as a sub-regional retail centre. This is facilitated and framed in policy terms by S1 which states that:

> "Within the town centre, planning permission will be granted for retail uses within the shopping core (primary shopping area) as set out on the Proposals Map.
>
> Retail development may be permitted elsewhere within the town centre provided it complements or contributes to the vitality and viability of the established shopping core and meets the criteria for edge-of-centre development set out in Policies S4 and S5 if applicable

> Proposals for retail development elsewhere that would undermine the existing shopping core will not be permitted".

4.7 In addition to policy S1, which considers specific town centre retail proposals, policy S2 outlines the Councils policy position with regard to the district and local centres as outlined above. Such district, local and speciality centres are perceived by Hastings Borough Council as providing convenient district and local level facilities as well as being valuable for specialist services. Policy S2 states:

> "The key retail frontages as defined on the Proposals Map will be protected for predominately A1 retail uses. Within these areas, planning permission will be granted for new retail development provided that it would not:
>
> (a) conflict with Policy S1; or
> (b) result in inconvenience and / or danger on the public highway; or
> (c) harm the character and appearance of the frontage.
>
> Planning permission for other uses will only be granted where they would not result in an over-concentration of non-A1 uses and would maintain or enhance the role of these areas as shopping centres".

4.8 Such a policy is an attempt by the Council to ensure that the key retail frontages within the local, district and speciality centres are retained for predominately A1 (shops) uses whilst planning applications for other retail uses such as A2 (financial and professional services), A3 (restaurants and cafes) and the new use classes of A4 (drinking establishments) and A5 (hot food takeaways) may be permitted in these areas but only provided they would not individually or cumulatively undermine the primary retail function of these areas.

4.9 Although the individual district, local and speciality centres will be considered in greater detail elsewhere in the report it is important to briefly expand upon the Council perception of each of the centres unique retail roles:

1) St Leonards: Though smaller it is similar in character to Hastings town centre in relation to office and business provision. It is designated as a speciality centre with a variety of restaurant uses and a concentration of antique shops in Norman Road.

2) Old Town: Viewed as a speciality centre with its unique collection of restaurants, antique shops, second-hand shops and tourist facilities.

3) Bohemia: Contains a selection of antique and second hand shops but has suffered from high vacancy levels, especially in the southern section of Bohemia road, where commercial uses have been gradually replaced by residential uses. Policy S3 explicitly attempts to retain the ground floor uses of properties on Bohemia Road for A1, A2 or A3 services.

4) Silverhill and Ore: These two district centres rely on a good range of local convenience stores and the specific presence of supermarkets.

4.10 Section 11a of the Hastings Local Plan 2004 considers the general policy context for the town centre in addition to highlighting site specific designations. A Town Centre Strategy has been developed by HBC in conjunction with the Hastings and Bexhill Task Force which aims to promote and support a comprehensive programme of improvements for the town centre. This includes:

- taking forward proposals for the ‘University Centre’;
- maintaining and enhancing its role as a sub-regional shopping centre;
- pedestrian and transport improvements;
- the creation of a safe town centre environment; and
- restoration and conversion of buildings and other important architectural features.

4.11 The site specific policies for Central St Leonards are contained within chapter 11b. After Hastings town centre, St Leonards is the largest shopping centre in the Borough centred around Kings Road and London Road. It contains a wide range of shops but with very few national chains. The Council in para 11.30 have identified the weaknesses of the centre as being orientated around the issues of traffic congestion, poor environmental quality, physical separation of the centre from the seafront, lack of sustained investment and a general requirement for regeneration.

4.12 As with Hastings town centre the Council has devised a strategy for improvement for St Leonard’s town centre which includes:

- a programme of support for existing retailers through environmental improvements and the concerted effort of attracting a new food store into the area;
- upgrading the built environment through the channelling of housing improvement grants, single regeneration budget and conservation grants into the centre;
- identifying key sites for improvement and regeneration such as the Warrior Station Area;
- introduction of a range of environmental, transport, traffic and safety improvements; and
- proposals to improve the A259.

4.13 Old Town is provided a specific policy context in chapter 11c. The centre is described as a historically valuable tourist resort with an element of specialist retail provision. The pedestrianisation of the main retail street (George Street) has changed the established character of the centre attracting a variety of craft, souvenir, antique shops and restaurants. The Old Town policy strategy centres upon:

- supporting the role of the Old Town shopping area as a speciality / local centre serving the needs of residents, visitors and tourists;
- the promotion of traffic claming and traffic reduction measures in the Old Town area;
- environmental improvements focused upon the seafront.

4.14 Hastings Borough Council in association with a number of active partners have initiated a Seafront Strategy which stretches for over two miles from St Leonards to Rock-a-Nore. Para 11.115 identifies five ‘character areas’ where regeneration funds will be targeted, namely:

- The Stade Maritime Heritage Area
- The Old Town Seafront
- The Pelham Group
- The 1930s Seafront
- Burtons’ St Leonards Seafront

4.15 The object of the strategy will be to highlight the specific character of each area without detracting from its existing attractions and cultural heritage. Major regeneration proposals as outlined above will be considered in more detail elsewhere in the report.

5.0 Sea Space Five Point Plan 2003

5.1 Sea Space was established as a regeneration company in 2003 by the Hastings and Bexhill Task Force. The Sea Space Regeneration Plan, adopted by the Steering Group in 2003, is primarily focused upon five key areas, namely education, business, urban renaissance, broadband and transport. The combined impact of the Sea Space Regeneration Plan is expected to achieve a number of pre-identified aims including:

- Excellence in education led by a new university centre;
- 100,000 sq m of business and education space;
- 1,400 new homes through the Hastings Millennium Community Programme;
- Expanded business and employment opportunities;
- Better transport infrastructure, road, bus and rail;
- Wide adoption of broadband technology.

Appendix 2

Telephone Survey

ASK TO SPEAK TO MAIN HOUSEHOLD SHOPPER

Good morning/ afternoon/ evening. My name is XXX and I am calling from Synovate, an independent research agency, on behalf of a number of local councils in the South East. We are conducting some research amongst people in your area about shopping habits and I was wondering if I could ask you some questions. It would take no longer than 10 minutes and all your answers will remain strictly confidential. Would that be ok?
IF NECESSARY (Use ESC H):

- Your number was selected at random from the Postal Address file and the Telephone Directory.
- This research is being conducted in order to help the council understand retail patterns and formulate future retail plans.
- This research is being conducted on behalf of Hastings Borough Council.
- This research is being conducted in accordance with the Code of Conduct of the Market Research Society, which means that all your answers will be treated in the strictest confidence.
- The results from those taking part will be analysed together, and reported simply as statistics. We can guarantee that no sales approaches of any kind will result from your participation in this research.
- If you would like to verify that Synovate is a bona fide research company I can give you the freephone number for the Market Research Society (0500 396999).

S1) CODE POSTCODE FROM SAMPLE – CHECK QUOTAS

Hastings West

TN38 0, TN38 9, TN38 8

CHECK QUOTA

Hastings East

TN37 7, TN37 6, TN34 2, TN34 1, TN34 3, TN35, 5

CHECK QUOTA

Bexhill

TN39 4, TN39 3, TN39 5, TN40 1, TN40 2

CHECK QUOTA

Rural West

TN33 9, BN24 6

CHECK QUOTA

Rural North

TN33 0, TN32 5, TN18 4, TN19 7

CHECK QUOTA

Rural East

TN31 6, TN31 7, TN35 4, TN36 4

CHECK QUOTA

ASK ALL

First of all, to ensure that we speak to a cross section of residents I would like to ask you some questions about yourself and your household.

S2) Code gender – DO NOT ASK: INTERVIEWER TO CODE

SINGLE CODE

M
F

S3) Firstly then, would you say you are the main or joint main shopper in the household? I'm thinking about all types of shopping and not just food.

SINGLE CODE

PROBE AS PER PRECODES

Yes – main shopper
Yes – joint main shopper
No – neither main nor joint main shopper – ASK FOR A REFERRAL

S4) And which of the following age groups do you fall into? Are you…?

READ OUT

Under 18	ASK FOR REFERRAL
18-24	
25-34	CHECK QUOTA – ASK FOR REFERRAL
35-44	
45-54	CHECK QUOTA – ASK FOR REFERRAL
55-64	
65+	CHECK QUOTA – ASK FOR A REFERRAL
(Refused)	CLOSE

S5) What is the occupation of the main income earner in your household?

SINGLE CODE
PROBE FULLY

AB	
C1	CHECK QUOTA
C2	
DE	CHECK QUOTA
(Refused)	CLOSE

Turning now to the shopping habits of you and your family…

I am interested in finding out the different places where you and your family make certain kinds of purchases.

Q1, Q2 & Q3 TO BE ASKED IN TURN FOR A) B) C) D) E) & F) CATI TO RANDOMISE ITEMS

A) clothes and shoes

B) major electrical items (including home computers)

C) furniture and carpets

D) small household goods like crockery and kitchen utensils

E) DIY and garden goods

F) books, toys and sports goods

Q1) Thinking firstly about xxxx shopping, / And when purchasing XXX, which ONE area, centre or retail park do you and your family tend to use most often?

PROBE AS PER PRECODES FOR CLARIFICATION WHERE NECESSARY
SINGLE CODE

Hastings town centre
Old Hastings district centre
B&Q, London Road, Hastings

MFI Bexhill Road, Hastings
Focus DIY, London Road, Hastings
B&Q Rye Road, Hastings
Bexhill town centre
Sidley district centre, Bexhill
Little Common district centre, Bexhill
Eastbourne town centre
Green Street, Eastbourne
Hampden Park, Eastbourne
Langney Shopping Centre, Eastbourne
Meads St, Eastbourne
Old Town, Eastbourne
Sea Side South, Eastbourne
Ore centre
Rye town centre
St Leonards town centre
Tunbridge Wells town centre
Silverhill district centre
Ravenside Retail Park - B&Q
Ravenside Retail Park - Homebase
Ravenside Retail Park - Currys
Ravenside Retail Park – Halfords
Ravenside Retail Park – other mentions
London [specify]
Elsewhere [specify]
Make purchases online
Don't know/couldn't say

Q2) And where else do you or your family shop for XXX?

PROBE AS PER PRECODES FOR CLARIFICATION WHERE NECESSARY

PRECODES AS PER Q1 BUT ADD - None, do not use other stores - SKIP TO NEXT CATEGORY

ASK IF ANSWER GIVEN AT Q1. IF 'DON'T KNOW' AT Q1 SKIP TO NEXT CATEGORY

Q3) Thinking about the total amount you spend on XXX every year, how much would you say you spend in XXX (answer at Q1), as a rough percentage?

PROBE AS PER PRECODES WHERE NECESSARY

Less than 25%
25% - 50%
51% - 75%
76% - 100%
(Don't know/couldn't say)

ASK ALL

Q4) Thinking about all the non-food items we have just been discussing, on average, how often would you say you and your family shop for non-food items of any kind?

PROBE AS PER PRECODES WHERE NECESSARY

More often than once a week
About once a week
Every 2-4 weeks
Less often
(Don't know/couldn't say)

Q5) Thinking about the areas or centres that you or your family use for non-food shopping, how do you normally travel there?

MULTI CODING POSSIBLE

Car
Motorcycle
Bus
Train
Taxi
Cycle
Walk
Other – specify
(It depends/couldn't say)

Q6) Do you NORMALLY combine these shopping trips for non-food items with your main food shop?

Yes
No
(Sometimes)

Turning then to think about food shopping…

Q7) At which ONE store would you say you normally do your main food and grocery shop?

PROBE FOR STORE NAME AND LOCATION
SINGLE CODE

Aldi, London Road, Bexhill
Alldays, Bohemia Road, St Leonards

Asda, Eastbourne
Budgens, Battle
Budgens, Rye
Coop Welcome - Fairlight Road, Ore
Coop Welcome - High Street, Battle
Coop Welcome - London Road, St Leonards
Coop Welcome – Cooden Sea Road, Bexhill
Coop Welcome - Ninfield Road, Bexhill
Coop Welcome - Seafront Road, Winchelsea Beach
Coop Welcome - Seddlescombe Road, Silverhill, Hastings
Coop Welcome - Western Road, Bexhill
Iceland, Castle Street, Hastings
Iceland, Ravenside Retail Park
Jempsons, Peasmarsh
Lidl, Ninfield Road, Bexhill
Safeway, Eastbourne
Safeway, Hastings (Queens Road)
Safeway, Tunbridge Wells
Sainsbury, Bexhill (Brockhurst Place)
Sainsbury, Eastbourne
Sainsbury, Hampden Park, Eastbourne
Sainsbury, Hastings
Sainsbury, Tunbridge Wells
Somerfield, Devonshire Road, Bexhill
Spar, Kings Road, St Leonards
Tesco, Eastbourne Extra (Lottbridge Drive)
Tesco, Hastings (Church Wood Drive)
Tesco, Pevensey Express
Tesco, Ravenside
Tesco, Seaside, Eastbourne
Tesco, Southborough Express
Tesco, Tunbridge Wells Metro
Tesco Express - Battle
Tesco Express - Fernside Avenue, Hastings
Tesco Express - Little Ridge Avenue, Hastings
Bohemia Road, Hastings
George Street, Old Town, Hastings
Elsewhere [specify]
Make purchases online
(Don't know/couldn't say)

Q8) And when TOPPING UP in between your main shopping trips, where else do you shop for food and groceries - including things such as newspapers, cigarettes, milk, bread and drinks?

PROBE FOR STORE NAME(S) AND LOCATION(S)

MULTI-CODING POSSIBLE

PRECODES AS PER Q7

ASK IF MAIN SHOP GIVEN AT Q7. IF 'DON'T KNOW' AT Q7 SKIP TO Q10

Q9) Thinking about the total amount you spend on food and household groceries every month, how much would you say you spend at XXX (answer at Q7), as a rough percentage?

PROBE AS PER PRECODES WHERE NECESSARY

Less than 25%

25% - 50%

51% - 75%

76% - 100%

(Don't know/couldn't say)

ASK ALL

Q10) On average, how often would you say you do your main food shop / main food shop at xxx (if answer given at Q7)?

PROBE AS PER PRECODES WHERE NECESSARY

More often than once a week

About once a week

Every 2-4 weeks

Less often

(Don't know/couldn't say)

Q11) And by which form of transport do you normally travel by to do your main food shop / main food shop at xxx (if answer given at Q7)?

MULTI CODING POSSIBLE

Car

Motorcycle

Bus

Train

Taxi

Cycle

Walk

Other – specify

(It depends/couldn't say)

Q12) How much would you say you normally spend when doing your main food shop / main food shop at xxx (if answer given at Q7)?

SINGLE CODE

PROBE AS PER PRECODES WHERE NECESSARY

Less than £10
£10- £30
£31 - £50
£51 - £70
£71 - £100
More than £100
(Don’t know/ it varies)
(Refused)

Q13) Do you NORMALLY combine your main food shopping trip with using services like banks, building societies and post offices?

Yes
No
(Sometimes)

Q14) And do you NORMALLY start your main food shop from home, work or from somewhere else? By that I mean where would you normally set off from?

SINGLE CODE

Work
Home
Somewhere else
(Don’t know/ it depends)

Moving away from shopping now and thinking more generally about the leisure activities that you and your family get involved in …

Q15) Which of the following facilities do you use in your LOCAL AREA? Do you go to…?

READ OUT & CODE ALL THAT APPLY

MULTICODING POSSIBLE

Cinemas

Theatres/concert halls

Restaurants

Night clubs

Social clubs

Bingo

Health clubs

10 pin bowling

Casinos

A leisure centre to take part in activities/sports

(None/do not participate in leisure activities)

Q16) And which ONE of the following town centres would you prefer to go to for leisure activities, such as those we have just mentioned or any others you may get involved in?

READ OUT

SINGLE CODE

Hastings
Eastbourne
Bexhill
Tunbridge Wells
Or would you prefer to go somewhere else? - specify
(Don't know / no preference)

I would now like you to think specifically about the town centre of Hastings. It doesn't matter if you don't visit Hastings very often, it is just your impressions we're after.

Q17) So firstly, how often do you visit Hastings town centre?

SINGLE CODE

PROBE AS PER PRECODES

1. Daily
2. 2 or 3 times a week
3. Weekly
4. Fortnightly
5. Monthly
6. Every 2 or 3 months
7. Every 6 months
8. Yearly

9. Less often than yearly

10. Never

11. (Don’t know/couldn’t say)

ASK IF CODES 1-9 OR CODE 11 AT Q17. IF CODE 10 (NEVER) AT Q17 SKIP TO Q20

Q18) And when did you last visit Hastings town centre?

SINGLE CODE

PROBE AS PER PRECODES

1. Today
2. Yesterday
3. Within the last week
4. Within the last fortnight
5. Within the last month
6. Within the last 2 or 3 months
7. Within the last six months
8. Within the last year
9. Longer ago
10. (Don’t know/can’t remember)

ASK IF VISITED WITHIN LAST YEAR (CODES1-8). OTHERS SKIP TO Q20

Q19) On that last occasion, how did you travel to Hastings?

MULTI CODING POSSIBLE

PROBE AS PER PRECODES

Car

Motorbike

Bus

Train

Taxi

Cycle

Walk

Other - specify

(Don’t know/couldn’t say)

ASK ALL

Q20) Thinking more generally now, I would like you to rate certain aspects of Hastings town centre. Please use a scale of 1 – 5, where 1 means you are “not at all satisfied” with that aspect and 5 means you are “very satisfied”.

IF NECESSARY – IT DOESN’T MATTER IF YOU DON’T VISIT HASTINGS VERY OFTEN, IT IS JUST YOUR IMPRESSIONS WE’RE AFTER

So firstly/ And what about XXX? (How would you rate this aspect of Hastings town centre on a scale of 1 – 5 where 1 means “not at all satisfied” and 5 means “very satisfied”?)

CATI TO RANDOMISE STATEMENTS

	1	2	3	4	5	Don’t know
Public transport (i.e. trains & buses)						
Public facilities, for example seating, toilets and signposts						
Parking						
The range of shops available						
The typical opening hours of shops						
The range of services available (i.e. banks and building societies, travel agents, estate agents, dentists, solicitors, ATMs, eating and drinking facilities etc.)						
The evening activities available						
The appearance of the buildings						
The appearance of the streets						

I would now like to find out how safe you personally consider Hastings to be.

Q21a) Firstly, how safe do you feel in Hastings town centre during the day, using a scale of 1 to 5 where 1 means “not at all safe” and 5 means “very safe”?

Q21b) And how safe do you feel in Hastings town centre during the evening (again on a scale of 1 to 5, where 1 means “not at all safe” and 5 means “very safe”)?

SINGLE CODE

1

2

3

4

5

(Don’t know)

ASK ALL

I am now interested in finding out what improvements you think could be made to Hastings town centre.

IF NECESSARY - We are interested in getting the opinions of all those in the South East, whether you visit Hastings regularly or not.

Q22) So firstly, what additional leisure facilities would you like to see in Hastings town centre?

Write in

Q23) And which particular shops would you like to see in Hastings town centre?

PROBE FOR ACTUAL SHOP NAME

Write in

Q24) So overall, what do you think could be done to improve shopping in Hastings town centre?

Write in

Finally I would like to ask you a couple of questions about your household, just to classify your answers.

Q25) How many adults aged 18+ are there in your household?

SINGLE CODE

1

2

3

4

5+

(Refused)

ASK IF CODES 2-5 AT Q25

Q26) And how many dependent children under the age of 18 are there?

SINGLE CODE

None
1
2
3
4
5
6+
(Refused)

Q27) How many cars are there in your household?

SINGLE CODE

None
1
2
3
4+
(Refused)

Q29) And finally, can I please take a note of your name as proof of this interview?

Write in

Standard thank & close

Appendix 3
On-Street Survey

SYNOVATE, MOUNT OFFHAM, OFFHAM, WEST MALLING, KENT, ME19 5PG

JOB NO: 95085101 **April 2005**

For Office Use only

Good morning/afternoon. I am from Synovate, an independent market research company **(SHOW IDENTITY CARD)**. We are carrying out a market research survey in this area and would like to ask you a few questions.

(1-5)

Ask: All

Q1. How frequently do you visit Hastings town centre?

Daily	☐ 1	GOTO Q3	(6)
Not daily but more than once a week	☐ 2	GOTO Q3	
Once a week	☐ 3	GOTO Q3	
Less than once a week but more than once a month	☐ 4	GOTO Q3	
Once a month	☐ 5	GOTO Q3	
Less than once a month	☐ 6	GOTO Q3	
First visit	☐ 7	GOTO Q2A	

Ask: All those making their first visit to Hastings
SHOWCARD Q2A

Q2A. Are you..?

On holiday	☐ 1	(7-36)
In town for the day (sight seeing)	☐ 2	
Visiting relatives/friends	☐ 3	
New resident	☐ 4	
Other (SPECIFY)	☐ 29	
Don't Know	☐ 30	

Ask: All those making their first visit to Hastings
SHOWCARD Q2B

Q2B. How do you rate your first impressions of Hastings Town Centre overall?

Very good/better than expected	☐ 1	(37)
Good	☐ 2	
Average/As expected	☐ 3	
Poor	☐ 4	
Very poor/ very disappointing	☐ 5	
Don't Know	☐ 6	

Ask: All those making their first visit to Hastings
SHOWCARD Q2C

Q2C. Which of the following activities do you intend to do in Hastings town centre today ?

Shopping	☐ 1	(38-67)
Visit bank/building society	☐ 2	
Visit other services eg. estate agents	☐ 3	
Eat out	☐ 4	
Visit cinema/other entertainment	☐ 5	
Business meeting	☐ 6	
Social Visit	☐ 7	
Sight seeing	☐ 8	
Other (SPECIFY)	☐ 29	
Don't know	☐ 30	

ASK Q3 OF THOSE THAT HAVE BEEN TO HASTINGS BEFORE. OTHER GOTO Q4.

Ask: Those that have been to Hastings before today
SHOWCARD Q3

Q3. Which of the following activities do you intend to do in Hastings town centre today ?

SHOWCARD Q3.1

Q3.1. And how would you rate these activities? On a scale of 1 to 5, where 1 means it is very poor and 5 means it is Excellent.

	Q3	**Q3.1**					
	(68-97)	1 - Very poor	2	3	4	5 - Excellent	Don't know
Shopping	☐ 1	☐1	☐2	☐3	☐4	☐5	☐6
Visit bank/building society	☐ 2	☐1	☐2	☐3	☐4	☐5	☐6
Visit other services eg. estate agents	☐ 3	☐1	☐2	☐3	☐4	☐5	☐6
Eat out	☐ 4	☐1	☐2	☐3	☐4	☐5	☐6
Visit cinema/other entertainment	☐ 5	☐1	☐2	☐3	☐4	☐5	☐6
Business meeting	☐ 6	☐1	☐2	☐3	☐4	☐5	☐6
Social Visit	☐ 7	☐1	☐2	☐3	☐4	☐5	☐6
Sight seeing	☐ 8	☐1	☐2	☐3	☐4	☐5	☐6
Other (SPECIFY)	☐ 29	☐1	☐2	☐3	☐4	☐5	☐6

Ask: All

Q4. What method of transport did you use to get here today?

Train	☐ 1	(124-142)
Bus	☐ 2	
Car	☐ 3	
Motorcycle or scooter	☐ 4	
Bicycle	☐ 5	
Walk	☐ 6	
Other (SPECIFY)	☐ 19	

Ask: Those travelling by bus

Q4.1. Did you find the bus stop convenient?

Yes	☐ 1	(143)
No	☐ 2	

Ask: Those travelling by Car, motorcycle or scooter

Q4.2. Where did you park?

(144-145)

Ask: Those travelling by bicycle

Q4.3. Have you left your bicycle in a cycle rack? If so where?

(146-175)

Ask: All

Q5. Do you think anything needs to be done to improve shopping in Hastings?

No, it is ok as it is	☐ 1	GOTO Q7	(176)
Yes	☐ 2	GOTO Q6	
Don't Know	☐ 3	GOTO Q7	

Ask: Those thinking shopping in Hastings needs to be improved

Q6. What could be done to improve shopping in Hastings town centre?

Improve the range of shops	☐ 1		(177-206)
Better parking	☐ 2		
Tidier streets	☐ 3		
Other (SPECIFY)________________	☐ 29		
Don't know	☐ 30		

Ask: Those thinking the range of shops could be improved

Q6B. Are there any particular sectors or particular shops that need to be improved to make shopping in Hastings better

____ (207-236)

____

____

____

Ask: All

Q7. Do you think anything needs to be done to improve retail services in Hastings? (E.G. Banks/ Building Societies/ Estate or Travel Agents/ Drinking and eating Facilities)

No, it is ok as it is	☐ 1	GOTO Q9	(237)
Yes	☐ 2	GOTO Q8	
Don't Know	☐ 3	GOTO Q9	

Ask: Those thinking the retail services could be improved

Q8. What could be done to improve retail services in Hastings town centre?

Improve the range of services	☐ 1		(238-267)
Longer opening hours	☐ 2		
Other (SPECIFY)________________	☐ 29		
Don't know	☐ 30		

Ask: Those thinking the retail services could be improved

Q8B. Are there any particular sectors or particular shops that need to be improved to make shopping in Hastings better

____ (268-297)

____

____

____

Ask: All

SHOWCARD Q9

Q9. How would you rate the following aspects of Hastings town centre on a scale of 1-5 where 1 means 'not at all satisfied' and 5 means 'very satisfied'?

	1 - Not at all satisfied	2	3	4	5 - Very satisfied	Don't Know	
Public Transport (ie Buses and Trains)	☐1	☐2	☐3	☐4	☐5	☐6	(298)
Public facilities(ie seating, toilets, sign posts)	☐1	☐2	☐3	☐4	☐5	☐6	(299)
Parking	☐1	☐2	☐3	☐4	☐5	☐6	(300)
The range of shops available	☐1	☐2	☐3	☐4	☐5	☐6	(301)
The typical opening hours of shops	☐1	☐2	☐3	☐4	☐5	☐6	(302)
The range of services available (ie Banks/ Building Societies/ Estate or Travel Agents/ Drinking and eating Facilities)	☐1	☐2	☐3	☐4	☐5	☐6	(303)
The evening activities available	☐1	☐2	☐3	☐4	☐5	☐6	(304)
The appearance of buildings	☐1	☐2	☐3	☐4	☐5	☐6	(305)
The appearance of streets	☐1	☐2	☐3	☐4	☐5	☐6	(306)

Ask:	All
	SHOWCARD Q10
Q10A.	**I'd like to ask you how safe you personally consider Hastings to be.(a) How safe do you feel in the day? (Where 1 means 'not at all safe' and 5 means 'very safe')**

Not at all safe - 1	☐ 1	(307)
2	☐ 2	
3	☐ 3	
4	☐ 4	
Very safe - 5	☐ 5	

Ask:	All
	SHOWCARD Q10
Q10B.	**(b) How safe do you feel in the evening? (Where 1 means 'not at all safe' and 5 means 'very safe')**

Not at all safe -1	☐ 1	(308)
2	☐ 2	
3	☐ 3	
4	☐ 4	
Very safe -5	☐ 5	

Ask:	All
	SHOWCARD Q11
Q11.	**Approximately how much do you expect to spend in the town centre today?**

Less than £10	☐ 1	(309)
£10 to £19	☐ 2	
£20 to £29	☐ 3	
£30 to £39	☐ 4	
£40 to £49	☐ 5	
£50 to £60	☐ 6	
More than £60	☐ 7	

Ask:	All SHOWCARD Q12			
Q12.	**Could you tell me which of these age groups you fall into?**			
	Under 20	☐ 1		(310)
	20-29	☐ 2		
	30-39	☐ 3		
	40-49	☐ 4		
	50-59	☐ 5		
	60-69	☐ 6		
	70-79	☐ 7		
	80+	☐ 8		

Ask:	All		
Q13.	**INTERVIEWER RECORD GENDER**		
	Male	☐ 1	(311)
	Female	☐ 2	

Ask:	All		
Q14.	**What is your present working status?**		
	Working full time (30+ hours per week)	☐ 1	(312-313)
	Working part time (<30 hours per week)	☐ 2	
	No paid job (housewife/husband)	☐ 3	
	Unemployed	☐ 4	
	Retired	☐ 5	
	Student	☐ 6	
	Other (SPECIFY)	☐ 29	
	(Refused)	☐ 30	

NAME AND ADDRESS OF RESPONDENT FOR BACK-CHECKING PURPOSES ONLY.

Name:..

Address:..

Post Code: ....

Telephone Number: (INCL. STD CODE)..

THANK RESPONDENT AND CLOSE

INTERVIEWED IN ACCORDANCE WITH THE MRS CODE OF CONDUCT

Signed by Interviewer:

Interviewer ID: ☐☐☐☐☐ (314-318)

Date of interview: ☐☐ : ☐☐ : 0 5 (319-324)

Time of interview: ☐☐ : ☐☐ (325-328)

PLEASE NOTE ACCORDING TO 24 HOUR CLOCK E.G. 1:00PM WILL BE 1 3 : 0 0

FOR OFFICE USE ONLY:

CODER 1 (329-330) CODER 2 (331-332) PUNCHER 1 (333-334) PUNCHER 2 (335-336)

(337)