

APPENDICES

APPENDIX 1: COMPARISON GOODS NEED PROJECTIONS

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 1
Survey Population Forecasts

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 | Total |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|------------|------------|---------------|
| 2015 | 15,594 | 40,309 | 35,067 | 9,487 | 12,483 | 44,269 | 29,504 | 10,067 | 6,551 | 7,555 | 210,886 |
| 2020 | 16,082 | 41,577 | 36,191 | 9,795 | 12,926 | 45,812 | 30,414 | 10,438 | 6,798 | 7,799 | 217,832 |
| 2025 | 16,618 | 42,946 | 37,396 | 10,178 | 13,460 | 47,707 | 31,407 | 10,908 | 7,088 | 8,110 | 225,818 |
| 2030 | 17,130 | 44,287 | 38,564 | 10,547 | 13,974 | 49,555 | 32,321 | 11,364 | 7,363 | 8,415 | 233,520 |
| <i>Change 2015-35</i> | <i>1,536</i> | <i>3,978</i> | <i>3,497</i> | <i>1,060</i> | <i>1,491</i> | <i>5,286</i> | <i>2,817</i> | <i>1,297</i> | <i>812</i> | <i>860</i> | <i>22,634</i> |

Source: Experian Micromarketer (October 2014)

Table 1A
Survey Area Postal Sectors

| Zone | Postal Sectors |
|---------|------------------------------|
| Zone 1 | TN34 1, TN37 6 |
| Zone 2 | TN37 7, TN38 0/8/9 |
| Zone 3 | TN34 2/3, TN35 5 |
| Zone 4 | TN35 4, TN36 4 |
| Zone 5 | TN33 0/9 |
| Zone 6 | TN39 3/4/5, TN40 1/2 |
| Zone 7 | BN24 5/6, BN27 1/2/4, TN21 9 |
| Zone 8 | TN19 7, TN32 5 |
| Zone 9 | TN31 6 |
| Zone 10 | TN31 7 |

Source: Hastings Household Survey, September/October 2015

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2013 prices) - Comparison Goods

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| 2013 | 2,950 | 3,259 | 3,107 | 4,012 | 4,039 | 3,259 | 3,505 | 4,562 | 4,795 | 3,076 |
| 2015 | 3,243 | 3,582 | 3,415 | 4,410 | 4,441 | 3,582 | 3,853 | 5,015 | 5,271 | 3,381 |
| 2015 Minus SFT at 11.7% | 2,864 | 3,163 | 3,016 | 3,894 | 3,921 | 3,163 | 3,403 | 4,428 | 4,654 | 2,985 |
| 2020 | 3,848 | 4,250 | 4,051 | 5,232 | 5,268 | 4,250 | 4,571 | 5,949 | 6,253 | 4,011 |
| 2020 Minus SFT at 14.9% | 3,274 | 3,616 | 3,448 | 4,453 | 4,483 | 3,616 | 3,890 | 5,063 | 5,321 | 3,413 |
| 2025 | 4,478 | 4,946 | 4,715 | 6,089 | 6,131 | 4,946 | 5,320 | 6,923 | 7,277 | 4,668 |
| 2025 Minus SFT at 15.0% | 3,806 | 4,204 | 4,008 | 5,176 | 5,211 | 4,204 | 4,522 | 5,885 | 6,185 | 3,968 |
| 2030 | 5,242 | 5,789 | 5,519 | 7,128 | 7,176 | 5,789 | 6,227 | 8,104 | 8,518 | 5,464 |
| 2030 Minus SFT at 14.7% | 4,471 | 4,938 | 4,708 | 6,080 | 6,121 | 4,938 | 5,312 | 6,913 | 7,266 | 4,661 |

Expenditure growth rates: 2013-14: 4.2%pa; 2014-15: 5.5%pa; 2015-16: 5.3%pa; 2016-17: 3.2%pa; 2017-18: 2.9%pa; 2018-23: 3.0%pa; 2023-35: 3.2%pa

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3

Survey Area Retail Expenditure Forecasts (2013 prices)

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 | Total |
|-----------------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|-------------|--------------|
| | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) |
| 2015 | 44.7 | 127.5 | 105.7 | 36.9 | 48.9 | 140.0 | 100.4 | 44.6 | 30.5 | 22.6 | 701.8 |
| 2020 | 52.7 | 150.4 | 124.8 | 43.6 | 57.9 | 165.7 | 118.3 | 52.8 | 36.2 | 26.6 | 829.0 |
| 2025 | 63.2 | 180.5 | 149.9 | 52.7 | 70.1 | 200.5 | 142.0 | 64.2 | 43.8 | 32.2 | 999.3 |
| 2030 | 76.6 | 218.7 | 181.6 | 64.1 | 85.5 | 244.7 | 171.7 | 78.6 | 53.5 | 39.2 | 1,214.2 |
| Change 2015-30 | 31.9 | 91.2 | 75.8 | 27.2 | 36.6 | 104.7 | 71.3 | 34.0 | 23.0 | 16.7 | 512.4 |

Source: Tables 1 & 2

Source: Hastings Household Telephone Survey, September/October 2015

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 4
Comparison Goods Allocation 2015 - % Market Share

| Zone | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Centre/Store | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) |
| Comparison goods floorspace in Hastings Borough | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| Hastings Town Centre | 72.34% | 32.98% | 55.45% | 57.03% | 34.93% | 9.72% | 0.93% | 16.46% | 38.66% | 33.38% |
| Sub-total, Zone 1 | 72.34% | 32.98% | 55.45% | 57.03% | 34.93% | 9.72% | 0.93% | 16.46% | 38.66% | 33.38% |
| Zone 2 | | | | | | | | | | |
| St Leonards District Centre | 9.09% | 12.50% | 7.47% | 8.73% | 4.44% | 1.29% | 0.00% | 1.24% | 5.76% | 3.87% |
| Tesco Extra, Church Wood Drive, St. Leonards-on-Sea | 0.25% | 4.72% | 0.93% | 0.95% | 2.24% | 0.00% | 0.00% | 0.28% | 0.14% | 1.67% |
| Hastings Business Park | 0.00% | 0.28% | 0.90% | 0.28% | 3.82% | 0.38% | 0.00% | 0.20% | 0.00% | 0.74% |
| Sub-total, Zone 2 | 9.34% | 17.51% | 9.30% | 9.95% | 10.51% | 1.67% | 0.00% | 1.71% | 5.89% | 6.29% |
| Zone 3 | | | | | | | | | | |
| Hastings Old Town District Centre | 0.00% | 0.18% | 0.60% | 0.00% | 0.00% | 0.19% | 0.00% | 0.05% | 0.00% | 0.09% |
| Ore Village District Centre | 0.00% | 0.13% | 0.21% | 1.49% | 0.00% | 0.00% | 0.00% | 0.00% | 0.09% | 0.22% |
| Sub-total, Zone 3 | 0.00% | 0.31% | 0.81% | 1.49% | 0.00% | 0.19% | 0.00% | 0.05% | 0.09% | 0.31% |
| Local/other shops within Hastings Borough | 1.25% | 4.54% | 2.37% | 4.73% | 2.08% | 0.09% | 0.71% | 0.69% | 2.89% | 0.54% |
| Total Zones Within Hastings (A) | 82.93% | 55.33% | 67.92% | 73.21% | 47.52% | 11.66% | 1.64% | 18.91% | 47.54% | 40.51% |
| Comparison goods floorspace outside Hastings (within survey area) | | | | | | | | | | |
| Zone 5 | | | | | | | | | | |
| Battle | 0.00% | 0.08% | 0.00% | 0.44% | 7.19% | 0.99% | 0.00% | 1.70% | 0.00% | 0.00% |
| Sub-total, Zone 5 | 0.00% | 0.08% | 0.00% | 0.44% | 7.19% | 0.99% | 0.00% | 1.70% | 0.00% | 0.00% |
| Zone 6 | | | | | | | | | | |
| Ravenside Retail & Leisure Park | 9.73% | 19.22% | 14.48% | 12.01% | 12.83% | 23.95% | 0.78% | 7.23% | 7.69% | 3.26% |
| Bexhill | 0.00% | 3.58% | 2.08% | 2.84% | 3.36% | 27.42% | 0.00% | 1.58% | 2.32% | 1.12% |
| Sub-total, Zone 6 | 9.73% | 22.80% | 16.56% | 14.85% | 16.19% | 51.37% | 0.78% | 8.81% | 10.01% | 4.38% |
| Zone 7 | | | | | | | | | | |
| Hailsham | 0.00% | 0.00% | 0.00% | 0.00% | 1.73% | 0.00% | 14.73% | 0.05% | 0.00% | 0.00% |
| Hailsham Retail Park | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 3.73% | 0.00% | 0.00% | 0.00% |
| Sub-total, Zone 7 | 0.00% | 0.00% | 0.00% | 0.00% | 1.73% | 0.00% | 18.46% | 0.05% | 0.00% | 0.00% |
| Zone 10 | | | | | | | | | | |
| Rye | 0.00% | 0.00% | 0.00% | 1.98% | 0.41% | 0.27% | 0.00% | 0.47% | 7.03% | 22.54% |
| Sub-total, Zone 10 | 0.00% | 0.00% | 0.00% | 1.98% | 0.41% | 0.27% | 0.00% | 0.47% | 7.03% | 22.54% |
| Local / other shops in survey area | 0.57% | 1.17% | 0.50% | 0.43% | 1.80% | 1.96% | 1.64% | 2.80% | 1.14% | 3.76% |
| Total for other zones inside survey area (B) | 10.30% | 24.05% | 17.06% | 17.71% | 27.33% | 54.59% | 20.89% | 13.83% | 18.18% | 30.68% |
| Comparison goods floorspace outside Hastings (outside survey area) | | | | | | | | | | |
| Eastbourne | | | | | | | | | | |
| <i>Eastbourne Town Centre</i> | 2.22% | 11.56% | 3.14% | 3.06% | 8.62% | 20.61% | 52.30% | 4.65% | 2.36% | 0.90% |
| <i>The Crumbles Retail Park, Eastbourne</i> | 0.00% | 0.70% | 0.30% | 0.05% | 1.32% | 1.99% | 5.35% | 0.25% | 0.36% | 0.00% |
| <i>Sovereign Harbour Retail Park, Eastbourne</i> | 0.00% | 0.00% | 0.23% | 0.10% | 0.31% | 3.89% | 3.25% | 1.53% | 0.00% | 0.00% |
| <i>Hampden Retail Park, Eastbourne</i> | 0.00% | 0.14% | 0.00% | 0.00% | 0.00% | 0.98% | 6.41% | 0.26% | 0.00% | 0.00% |
| Tunbridge Wells | 0.00% | 3.46% | 3.76% | 0.83% | 6.64% | 0.58% | 3.70% | 47.92% | 8.86% | 4.42% |
| Central London | 0.70% | 0.48% | 2.17% | 0.93% | 1.37% | 1.54% | 0.61% | 1.04% | 2.01% | 2.90% |
| Lakeside Shopping Centre | 1.12% | 1.53% | 0.30% | 0.46% | 1.93% | 0.78% | 0.00% | 0.22% | 0.43% | 0.50% |
| Ashford | 0.16% | 0.34% | 0.37% | 1.04% | 0.40% | 0.00% | 0.00% | 0.11% | 5.88% | 13.20% |
| Brighton | 0.16% | 0.45% | 0.85% | 0.10% | 0.15% | 0.79% | 1.14% | 0.00% | 2.87% | 0.33% |
| All other locations outside survey area | 2.41% | 1.96% | 3.90% | 2.53% | 4.41% | 2.58% | 4.72% | 11.28% | 11.51% | 6.56% |
| Total for locations outside survey area (C) | 6.77% | 20.62% | 15.01% | 9.09% | 25.15% | 33.74% | 77.48% | 67.25% | 34.28% | 28.80% |
| Overall total (A+B+C) | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

Source: NEMS Market Research Telephone Survey, September/October 2015

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 5a
Comparison Goods Allocation 2015 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|---------------|--------------|
| Total Available Spend - 2015 | 44.7 | 127.5 | 105.7 | 36.9 | 48.9 | 140.0 | 100.4 | 44.6 | 30.5 | 22.6 | 701.8 | 100.0 |
| Comparison goods floorspace in Hastings Borough | | | | | | | | | | | | |
| Zone 1 | | | | | | | | | | | | |
| Hastings Town Centre | 32.3 | 42.0 | 58.6 | 21.1 | 17.1 | 13.6 | 0.9 | 7.3 | 11.8 | 7.5 | 212.3 | 30.3 |
| Sub-total, Zone 1 | 32.3 | 42.0 | 58.6 | 21.1 | 17.1 | 13.6 | 0.9 | 7.3 | 11.8 | 7.5 | 212.3 | 30.3 |
| Zone 2 | | | | | | | | | | | | |
| St Leonards District Centre | 4.1 | 15.9 | 7.9 | 3.2 | 2.2 | 1.8 | 0.0 | 0.6 | 1.8 | 0.9 | 38.3 | 5.5 |
| Tesco Extra, Church Wood Drive, St. Leonards-on-Sea | 0.1 | 6.0 | 1.0 | 0.3 | 1.1 | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 9.1 | 1.3 |
| Hastings Business Park | 0.0 | 0.4 | 1.0 | 0.1 | 1.9 | 0.5 | 0.0 | 0.1 | 0.0 | 0.2 | 4.1 | 0.6 |
| Sub-total, Zone 2 | 4.2 | 22.3 | 9.8 | 3.7 | 5.1 | 2.3 | 0.0 | 0.8 | 1.8 | 1.4 | 51.5 | 7.3 |
| Zone 3 | | | | | | | | | | | | |
| Hastings Old Town District Centre | 0.0 | 0.2 | 0.6 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 | 0.2 |
| Ore Village District Centre | 0.0 | 0.2 | 0.2 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.1 |
| Sub-total, Zone 3 | 0.0 | 0.4 | 0.9 | 0.6 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.1 | 2.2 | 0.3 |
| Local/other shops within Hastings Borough | 0.6 | 5.8 | 2.5 | 1.7 | 1.0 | 0.1 | 0.7 | 0.3 | 0.9 | 0.1 | 13.8 | 2.0 |
| Total Zones Within Hastings (A) | 37.0 | 70.6 | 71.8 | 27.0 | 23.3 | 16.3 | 1.6 | 8.4 | 14.5 | 9.1 | 279.8 | 39.9 |
| Comparison goods floorspace outside Hastings (within survey area) | | | | | | | | | | | | |
| Zone 5 | | | | | | | | | | | | |
| Battle | 0.0 | 0.1 | 0.0 | 0.2 | 3.5 | 1.4 | 0.0 | 0.8 | 0.0 | 0.0 | 5.9 | 0.8 |
| Sub-total, Zone 5 | 0.0 | 0.1 | 0.0 | 0.2 | 3.5 | 1.4 | 0.0 | 0.8 | 0.0 | 0.0 | 5.9 | 0.8 |
| Zone 6 | | | | | | | | | | | | |
| Ravenside Retail & Leisure Park | 4.3 | 24.5 | 15.3 | 4.4 | 6.3 | 33.5 | 0.8 | 3.2 | 2.3 | 0.7 | 95.5 | 13.6 |
| Bexhill | 0.0 | 4.6 | 2.2 | 1.0 | 1.6 | 38.4 | 0.0 | 0.7 | 0.7 | 0.3 | 49.5 | 7.1 |
| Sub-total, Zone 6 | 4.3 | 29.1 | 17.5 | 5.5 | 7.9 | 71.9 | 0.8 | 3.9 | 3.1 | 1.0 | 145.0 | 20.7 |
| Zone 7 | | | | | | | | | | | | |
| Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.8 | 0.0 | 14.8 | 0.0 | 0.0 | 0.0 | 15.7 | 2.2 |
| Hailsham Retail Park | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.7 | 0.0 | 0.0 | 0.0 | 3.7 | 0.5 |
| Sub-total, Zone 7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.8 | 0.0 | 18.5 | 0.0 | 0.0 | 0.0 | 19.4 | 2.8 |
| Zone 10 | | | | | | | | | | | | |
| Rye | 0.0 | 0.0 | 0.0 | 0.7 | 0.2 | 0.4 | 0.0 | 0.2 | 2.1 | 5.1 | 8.8 | 1.2 |
| Sub-total, Zone 10 | 0.0 | 0.0 | 0.0 | 0.7 | 0.2 | 0.4 | 0.0 | 0.2 | 2.1 | 5.1 | 8.8 | 1.2 |
| Local /other shops in survey area | 0.3 | 1.5 | 0.5 | 0.2 | 0.9 | 2.7 | 1.7 | 1.3 | 0.3 | 0.8 | 10.2 | 1.4 |
| Total for other zones inside survey area (B) | 4.6 | 30.7 | 18.0 | 6.5 | 13.4 | 76.4 | 21.0 | 6.2 | 5.5 | 6.9 | 189.3 | 27.0 |
| Comparison goods floorspace outside Hastings (outside survey area) | | | | | | | | | | | | |
| Eastbourne | | | | | | | | | | | | |
| <i>Eastbourne Town Centre</i> | 1.0 | 14.7 | 3.3 | 1.1 | 4.2 | 28.9 | 52.5 | 2.1 | 0.7 | 0.2 | 108.8 | 15.5 |
| <i>The Crumbles Retail Park, Eastbourne</i> | 0.0 | 0.9 | 0.3 | 0.0 | 0.6 | 2.8 | 5.4 | 0.1 | 0.1 | 0.0 | 10.3 | 1.5 |
| <i>Sovereign Harbour Retail Park, Eastbourne</i> | 0.0 | 0.0 | 0.2 | 0.0 | 0.2 | 5.5 | 3.3 | 0.7 | 0.0 | 0.0 | 9.8 | 1.4 |
| <i>Hampden Retail Park, Eastbourne</i> | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 1.4 | 6.4 | 0.1 | 0.0 | 0.0 | 8.1 | 1.2 |
| Tunbridge Wells | 0.0 | 4.4 | 4.0 | 0.3 | 3.2 | 0.8 | 3.7 | 21.4 | 2.7 | 1.0 | 41.5 | 5.9 |
| Central London | 0.3 | 0.6 | 2.3 | 0.3 | 0.7 | 2.2 | 0.6 | 0.5 | 0.6 | 0.7 | 8.7 | 1.2 |
| Lakeside Shopping Centre | 0.5 | 2.0 | 0.3 | 0.2 | 0.9 | 1.1 | 0.0 | 0.1 | 0.1 | 0.1 | 5.3 | 0.8 |
| Ashford | 0.1 | 0.4 | 0.4 | 0.4 | 0.2 | 0.0 | 0.0 | 0.0 | 1.8 | 3.0 | 6.3 | 0.9 |
| Brighton | 0.1 | 0.6 | 0.9 | 0.0 | 0.1 | 1.1 | 1.1 | 0.0 | 0.9 | 0.1 | 4.8 | 0.7 |
| All other locations outside survey area | 1.1 | 2.5 | 4.1 | 0.9 | 2.2 | 3.6 | 4.7 | 5.0 | 3.5 | 1.5 | 29.2 | 4.2 |
| Total for locations outside survey area (C) | 3.0 | 26.3 | 15.9 | 3.4 | 12.3 | 47.3 | 77.8 | 30.0 | 10.5 | 6.5 | 232.8 | 33.2 |
| Overall total (A+B+C) | 44.7 | 127.5 | 105.7 | 36.9 | 48.9 | 140.0 | 100.4 | 44.6 | 30.5 | 22.6 | 701.8 | 100.0 |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 5b
Comparison Goods Allocation 2020 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|---------------|--------------|
| Total Available Spend - 2020 | 52.7 | 150.4 | 124.8 | 43.6 | 57.9 | 165.7 | 118.3 | 52.8 | 36.2 | 26.6 | 829.0 | 100.0 |
| Comparison goods floorspace in Hastings Borough | | | | | | | | | | | | |
| Zone 1 | | | | | | | | | | | | |
| Hastings Town Centre | 38.1 | 49.6 | 69.2 | 24.9 | 20.2 | 16.1 | 1.1 | 8.7 | 14.0 | 8.9 | 250.7 | 30.2 |
| Sub-total, Zone 1 | 38.1 | 49.6 | 69.2 | 24.9 | 20.2 | 16.1 | 1.1 | 8.7 | 14.0 | 8.9 | 250.7 | 30.2 |
| Zone 2 | | | | | | | | | | | | |
| St Leonards District Centre | 4.8 | 18.8 | 9.3 | 3.8 | 2.6 | 2.1 | 0.0 | 0.7 | 2.1 | 1.0 | 45.2 | 5.5 |
| Tesco Extra, Church Wood Drive, St. Leonards-on-Sea | 0.1 | 7.1 | 1.2 | 0.4 | 1.3 | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 10.7 | 1.3 |
| Hastings Business Park | 0.0 | 0.4 | 1.1 | 0.1 | 2.2 | 0.6 | 0.0 | 0.1 | 0.0 | 0.2 | 4.8 | 0.6 |
| Sub-total, Zone 2 | 4.9 | 26.3 | 11.6 | 4.3 | 6.1 | 2.8 | 0.0 | 0.9 | 2.1 | 1.7 | 60.7 | 7.3 |
| Zone 3 | | | | | | | | | | | | |
| Hastings Old Town District Centre | 0.0 | 0.3 | 0.7 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 1.4 | 0.2 |
| Ore Village District Centre | 0.0 | 0.2 | 0.3 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 1.2 | 0.1 |
| Sub-total, Zone 3 | 0.0 | 0.5 | 1.0 | 0.7 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.1 | 2.6 | 0.3 |
| Local/other shops within Hastings Borough | 0.7 | 6.8 | 3.0 | 2.1 | 1.2 | 0.1 | 0.8 | 0.4 | 1.0 | 0.1 | 16.3 | 2.0 |
| Total Zones Within Hastings (A) | 43.7 | 83.2 | 84.8 | 31.9 | 27.5 | 19.3 | 1.9 | 10.0 | 17.2 | 10.8 | 330.3 | 39.8 |
| Comparison goods floorspace outside Hastings (within survey area) | | | | | | | | | | | | |
| Zone 5 | | | | | | | | | | | | |
| Battle | 0.0 | 0.1 | 0.0 | 0.2 | 4.2 | 1.6 | 0.0 | 0.9 | 0.0 | 0.0 | 7.0 | 0.8 |
| Sub-total, Zone 5 | 0.0 | 0.1 | 0.0 | 0.2 | 4.2 | 1.6 | 0.0 | 0.9 | 0.0 | 0.0 | 7.0 | 0.8 |
| Zone 6 | | | | | | | | | | | | |
| Ravenside Retail & Leisure Park | 5.1 | 28.9 | 18.1 | 5.2 | 7.4 | 39.7 | 0.9 | 3.8 | 2.8 | 0.9 | 112.8 | 13.6 |
| Bexhill | 0.0 | 5.4 | 2.6 | 1.2 | 1.9 | 45.4 | 0.0 | 0.8 | 0.8 | 0.3 | 58.6 | 7.1 |
| Sub-total, Zone 6 | 5.1 | 34.3 | 20.7 | 6.5 | 9.4 | 85.1 | 0.9 | 4.7 | 3.6 | 1.2 | 171.4 | 20.7 |
| Zone 7 | | | | | | | | | | | | |
| Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.0 | 17.4 | 0.0 | 0.0 | 0.0 | 18.5 | 2.2 |
| Hailsham Retail Park | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 4.4 | 0.0 | 0.0 | 0.0 | 4.4 | 0.5 |
| Sub-total, Zone 7 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.0 | 21.8 | 0.0 | 0.0 | 0.0 | 22.9 | 2.8 |
| Zone 10 | | | | | | | | | | | | |
| Rye | 0.0 | 0.0 | 0.0 | 0.9 | 0.2 | 0.4 | 0.0 | 0.2 | 2.5 | 6.0 | 10.3 | 1.2 |
| Sub-total, Zone 10 | 0.0 | 0.0 | 0.0 | 0.9 | 0.2 | 0.4 | 0.0 | 0.2 | 2.5 | 6.0 | 10.3 | 1.2 |
| Local /other shops in survey area | 0.3 | 1.8 | 0.6 | 0.2 | 1.0 | 3.2 | 1.9 | 1.5 | 0.4 | 1.0 | 12.0 | 1.4 |
| Total for other zones inside survey area (B) | 5.4 | 36.2 | 21.3 | 7.7 | 15.8 | 90.4 | 24.7 | 7.3 | 6.6 | 8.2 | 223.7 | 27.0 |
| Comparison goods floorspace outside Hastings (outside survey area) | | | | | | | | | | | | |
| Eastbourne | | | | | | | | | | | | |
| <i>Eastbourne Town Centre</i> | 1.2 | 17.4 | 3.9 | 1.3 | 5.0 | 34.1 | 61.9 | 2.5 | 0.9 | 0.2 | 128.4 | 15.5 |
| <i>The Crumbles Retail Park, Eastbourne</i> | 0.0 | 1.1 | 0.4 | 0.0 | 0.8 | 3.3 | 6.3 | 0.1 | 0.1 | 0.0 | 12.1 | 1.5 |
| <i>Sovereign Harbour Retail Park, Eastbourne</i> | 0.0 | 0.0 | 0.3 | 0.0 | 0.2 | 6.5 | 3.8 | 0.8 | 0.0 | 0.0 | 11.6 | 1.4 |
| <i>Hampden Retail Park, Eastbourne</i> | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 1.6 | 7.6 | 0.1 | 0.0 | 0.0 | 9.6 | 1.2 |
| Tunbridge Wells | 0.0 | 5.2 | 4.7 | 0.4 | 3.8 | 1.0 | 4.4 | 25.3 | 3.2 | 1.2 | 49.1 | 5.9 |
| Central London | 0.4 | 0.7 | 2.7 | 0.4 | 0.8 | 2.5 | 0.7 | 0.5 | 0.7 | 0.8 | 10.3 | 1.2 |
| Lakeside Shopping Centre | 0.6 | 2.3 | 0.4 | 0.2 | 1.1 | 1.3 | 0.0 | 0.1 | 0.2 | 0.1 | 6.3 | 0.8 |
| Ashford | 0.1 | 0.5 | 0.5 | 0.5 | 0.2 | 0.0 | 0.0 | 0.1 | 2.1 | 3.5 | 7.4 | 0.9 |
| Brighton | 0.1 | 0.7 | 1.1 | 0.0 | 0.1 | 1.3 | 1.3 | 0.0 | 1.0 | 0.1 | 5.7 | 0.7 |
| All other locations outside survey area | 1.3 | 2.9 | 4.9 | 1.1 | 2.6 | 4.3 | 5.6 | 6.0 | 4.2 | 1.7 | 34.5 | 4.2 |
| Total for locations outside survey area (C) | 3.6 | 31.0 | 18.7 | 4.0 | 14.6 | 55.9 | 91.7 | 35.5 | 12.4 | 7.7 | 275.0 | 33.2 |
| Overall total (A+B+C) | 52.7 | 150.4 | 124.8 | 43.6 | 57.9 | 165.7 | 118.3 | 52.8 | 36.2 | 26.6 | 829.0 | 100.0 |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 5c
Comparison Goods Allocation 2025 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|---------------|--------------|
| Total Available Spend - 2025 | 63.2 | 180.5 | 149.9 | 52.7 | 70.1 | 200.5 | 142.0 | 64.2 | 43.8 | 32.2 | 999.3 | 100.0 |
| Comparison goods floorspace in Hastings Borough | | | | | | | | | | | | |
| Zone 1 | | | | | | | | | | | | |
| Hastings Town Centre | 45.8 | 59.5 | 83.1 | 30.0 | 24.5 | 19.5 | 1.3 | 10.6 | 16.9 | 10.7 | 302.0 | 30.2 |
| Sub-total, Zone 1 | 45.8 | 59.5 | 83.1 | 30.0 | 24.5 | 19.5 | 1.3 | 10.6 | 16.9 | 10.7 | 302.0 | 30.2 |
| Zone 2 | | | | | | | | | | | | |
| St Leonards District Centre | 5.7 | 22.6 | 11.2 | 4.6 | 3.1 | 2.6 | 0.0 | 0.8 | 2.5 | 1.2 | 54.4 | 5.4 |
| Tesco Extra, Church Wood Drive, St. Leonards-on-Sea | 0.2 | 8.5 | 1.4 | 0.5 | 1.6 | 0.0 | 0.0 | 0.2 | 0.1 | 0.5 | 12.9 | 1.3 |
| Hastings Business Park | 0.0 | 0.5 | 1.3 | 0.1 | 2.7 | 0.8 | 0.0 | 0.1 | 0.0 | 0.2 | 5.8 | 0.6 |
| Sub-total, Zone 2 | 5.9 | 31.6 | 13.9 | 5.2 | 7.4 | 3.3 | 0.0 | 1.1 | 2.6 | 2.0 | 73.1 | 7.3 |
| Zone 3 | | | | | | | | | | | | |
| Hastings Old Town District Centre | 0.0 | 0.3 | 0.9 | 0.0 | 0.0 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 1.7 | 0.2 |
| Ore Village District Centre | 0.0 | 0.2 | 0.3 | 0.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 1.5 | 0.1 |
| Sub-total, Zone 3 | 0.0 | 0.6 | 1.2 | 0.8 | 0.0 | 0.4 | 0.0 | 0.0 | 0.0 | 0.1 | 3.1 | 0.3 |
| Local/other shops within Hastings Borough | 0.8 | 8.2 | 3.6 | 2.5 | 1.5 | 0.2 | 1.0 | 0.4 | 1.3 | 0.2 | 19.6 | 2.0 |
| Total Zones Within Hastings (A) | 52.5 | 99.9 | 101.8 | 38.6 | 33.3 | 23.4 | 2.3 | 12.1 | 20.8 | 13.0 | 397.8 | 39.8 |
| Comparison goods floorspace outside Hastings (within survey area) | | | | | | | | | | | | |
| Zone 5 | | | | | | | | | | | | |
| Battle | 0.0 | 0.1 | 0.0 | 0.2 | 5.0 | 2.0 | 0.0 | 1.1 | 0.0 | 0.0 | 8.5 | 0.9 |
| Sub-total, Zone 5 | 0.0 | 0.1 | 0.0 | 0.2 | 5.0 | 2.0 | 0.0 | 1.1 | 0.0 | 0.0 | 8.5 | 0.9 |
| Zone 6 | | | | | | | | | | | | |
| Ravenside Retail & Leisure Park | 6.2 | 34.7 | 21.7 | 6.3 | 9.0 | 48.0 | 1.1 | 4.6 | 3.4 | 1.0 | 136.1 | 13.6 |
| Bexhill | 0.0 | 6.5 | 3.1 | 1.5 | 2.4 | 55.0 | 0.0 | 1.0 | 1.0 | 0.4 | 70.8 | 7.1 |
| Sub-total, Zone 6 | 6.2 | 41.2 | 24.8 | 7.8 | 11.4 | 103.0 | 1.1 | 5.7 | 4.4 | 1.4 | 206.9 | 20.7 |
| Zone 7 | | | | | | | | | | | | |
| Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 | 0.0 | 20.9 | 0.0 | 0.0 | 0.0 | 22.2 | 2.2 |
| Hailsham Retail Park | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.3 | 0.0 | 0.0 | 0.0 | 5.3 | 0.5 |
| Sub-total, Zone 7 | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 | 0.0 | 26.2 | 0.0 | 0.0 | 0.0 | 27.5 | 2.7 |
| Zone 10 | | | | | | | | | | | | |
| Rye | 0.0 | 0.0 | 0.0 | 1.0 | 0.3 | 0.5 | 0.0 | 0.3 | 3.1 | 7.3 | 12.5 | 1.3 |
| Sub-total, Zone 10 | 0.0 | 0.0 | 0.0 | 1.0 | 0.3 | 0.5 | 0.0 | 0.3 | 3.1 | 7.3 | 12.5 | 1.3 |
| Local /other shops in survey area | 0.4 | 2.1 | 0.8 | 0.2 | 1.3 | 3.9 | 2.3 | 1.8 | 0.5 | 1.2 | 14.5 | 1.5 |
| Total for other zones inside survey area (B) | 6.5 | 43.4 | 25.6 | 9.3 | 19.2 | 109.5 | 29.7 | 8.9 | 8.0 | 9.9 | 269.9 | 27.0 |
| Comparison goods floorspace outside Hastings (outside survey area) | | | | | | | | | | | | |
| Eastbourne | | | | | | | | | | | | |
| <i>Eastbourne Town Centre</i> | 1.4 | 20.9 | 4.7 | 1.6 | 6.0 | 41.3 | 74.3 | 3.0 | 1.0 | 0.3 | 154.6 | 15.5 |
| <i>The Crumbles Retail Park, Eastbourne</i> | 0.0 | 1.3 | 0.4 | 0.0 | 0.9 | 4.0 | 7.6 | 0.2 | 0.2 | 0.0 | 14.6 | 1.5 |
| <i>Sovereign Harbour Retail Park, Eastbourne</i> | 0.0 | 0.0 | 0.3 | 0.1 | 0.2 | 7.8 | 4.6 | 1.0 | 0.0 | 0.0 | 14.0 | 1.4 |
| <i>Hampden Retail Park, Eastbourne</i> | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 2.0 | 9.1 | 0.2 | 0.0 | 0.0 | 11.5 | 1.1 |
| Tunbridge Wells | 0.0 | 6.2 | 5.6 | 0.4 | 4.7 | 1.2 | 5.3 | 30.8 | 3.9 | 1.4 | 59.5 | 5.9 |
| Central London | 0.4 | 0.9 | 3.2 | 0.5 | 1.0 | 3.1 | 0.9 | 0.7 | 0.9 | 0.9 | 12.4 | 1.2 |
| Lakeside Shopping Centre | 0.7 | 2.8 | 0.4 | 0.2 | 1.4 | 1.6 | 0.0 | 0.1 | 0.2 | 0.2 | 7.6 | 0.8 |
| Ashford | 0.1 | 0.6 | 0.6 | 0.5 | 0.3 | 0.0 | 0.0 | 0.1 | 2.6 | 4.2 | 9.0 | 0.9 |
| Brighton | 0.1 | 0.8 | 1.3 | 0.1 | 0.1 | 1.6 | 1.6 | 0.0 | 1.3 | 0.1 | 6.9 | 0.7 |
| All other locations outside survey area | 1.5 | 3.5 | 5.8 | 1.3 | 3.1 | 5.2 | 6.7 | 7.2 | 5.0 | 2.1 | 41.6 | 4.2 |
| Total for locations outside survey area (C) | 4.3 | 37.2 | 22.5 | 4.8 | 17.6 | 67.7 | 110.0 | 43.2 | 15.0 | 9.3 | 331.6 | 33.2 |
| Overall total (A+B+C) | 63.2 | 180.5 | 149.9 | 52.7 | 70.1 | 200.5 | 142.0 | 64.2 | 43.8 | 32.2 | 999.3 | 100.0 |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Comparison Capacity Modelling

Table 5d
Comparison Goods Allocation 2030 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|---------------|--------------|
| Total Available Spend - 2030 | 76.6 | 218.7 | 181.6 | 64.1 | 85.5 | 244.7 | 171.7 | 78.6 | 53.5 | 39.2 | 1214.2 | 100.0 |
| Comparison goods floorspace in Hastings Borough | | | | | | | | | | | | |
| Zone 1 | | | | | | | | | | | | |
| Hastings Town Centre | 55.4 | 72.1 | 100.7 | 36.6 | 29.9 | 23.8 | 1.6 | 12.9 | 20.7 | 13.1 | 366.7 | 30.2 |
| Sub-total, Zone 1 | 55.4 | 72.1 | 100.7 | 36.6 | 29.9 | 23.8 | 1.6 | 12.9 | 20.7 | 13.1 | 366.7 | 30.2 |
| Zone 2 | | | | | | | | | | | | |
| St Leonards District Centre | 7.0 | 27.3 | 13.6 | 5.6 | 3.8 | 3.2 | 0.0 | 1.0 | 3.1 | 1.5 | 66.0 | 5.4 |
| Tesco Extra, Church Wood Drive, St. Leonards-on-Sea | 0.2 | 10.3 | 1.7 | 0.6 | 1.9 | 0.0 | 0.0 | 0.2 | 0.1 | 0.7 | 15.7 | 1.3 |
| Hastings Business Park | 0.0 | 0.6 | 1.6 | 0.2 | 3.3 | 0.9 | 0.0 | 0.2 | 0.0 | 0.3 | 7.1 | 0.6 |
| Sub-total, Zone 2 | 7.2 | 38.3 | 16.9 | 6.4 | 9.0 | 4.1 | 0.0 | 1.3 | 3.2 | 2.5 | 88.7 | 7.3 |
| Zone 3 | | | | | | | | | | | | |
| Hastings Old Town District Centre | 0.0 | 0.4 | 1.1 | 0.0 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 | 2.0 | 0.2 |
| Ore Village District Centre | 0.0 | 0.3 | 0.4 | 1.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 1.8 | 0.1 |
| Sub-total, Zone 3 | 0.0 | 0.7 | 1.5 | 1.0 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 0.1 | 3.8 | 0.3 |
| Local/other shops within Hastings Borough | 1.0 | 9.9 | 4.3 | 3.0 | 1.8 | 0.2 | 1.2 | 0.5 | 1.5 | 0.2 | 23.7 | 2.0 |
| Total Zones Within Hastings (A) | 63.5 | 121.0 | 123.3 | 46.9 | 40.7 | 28.5 | 2.8 | 14.9 | 25.4 | 15.9 | 483.0 | 39.8 |
| Comparison goods floorspace outside Hastings (within survey area) | | | | | | | | | | | | |
| Zone 5 | | | | | | | | | | | | |
| Battle | 0.0 | 0.2 | 0.0 | 0.3 | 6.2 | 2.4 | 0.0 | 1.3 | 0.0 | 0.0 | 10.4 | 0.9 |
| Sub-total, Zone 5 | 0.0 | 0.2 | 0.0 | 0.3 | 6.2 | 2.4 | 0.0 | 1.3 | 0.0 | 0.0 | 10.4 | 0.9 |
| Zone 6 | | | | | | | | | | | | |
| Ravenside Retail & Leisure Park | 7.5 | 42.0 | 26.3 | 7.7 | 11.0 | 58.6 | 1.3 | 5.7 | 4.1 | 1.3 | 165.5 | 13.6 |
| Bexhill | 0.0 | 7.8 | 3.8 | 1.8 | 2.9 | 67.1 | 0.0 | 1.2 | 1.2 | 0.4 | 86.3 | 7.1 |
| Sub-total, Zone 6 | 7.5 | 49.9 | 30.1 | 9.5 | 13.9 | 125.7 | 1.3 | 6.9 | 5.4 | 1.7 | 251.8 | 20.7 |
| Zone 7 | | | | | | | | | | | | |
| Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 1.5 | 0.0 | 25.3 | 0.0 | 0.0 | 0.0 | 26.8 | 2.2 |
| Hailsham Retail Park | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.4 | 0.0 | 0.0 | 0.0 | 6.4 | 0.5 |
| Sub-total, Zone 7 | 0.0 | 0.0 | 0.0 | 0.0 | 1.5 | 0.0 | 31.7 | 0.0 | 0.0 | 0.0 | 33.2 | 2.7 |
| Zone 10 | | | | | | | | | | | | |
| Rye | 0.0 | 0.0 | 0.0 | 1.3 | 0.4 | 0.7 | 0.0 | 0.4 | 3.8 | 8.8 | 15.3 | 1.3 |
| Sub-total, Zone 10 | 0.0 | 0.0 | 0.0 | 1.3 | 0.4 | 0.7 | 0.0 | 0.4 | 3.8 | 8.8 | 15.3 | 1.3 |
| Local /other shops in survey area | 0.4 | 2.6 | 0.9 | 0.3 | 1.5 | 4.8 | 2.8 | 2.2 | 0.6 | 1.5 | 17.6 | 1.5 |
| Total for other zones inside survey area (B) | 7.9 | 52.6 | 31.0 | 11.4 | 23.4 | 133.6 | 35.9 | 10.9 | 9.7 | 12.0 | 328.3 | 27.0 |
| Comparison goods floorspace outside Hastings (outside survey area) | | | | | | | | | | | | |
| Eastbourne | | | | | | | | | | | | |
| <i>Eastbourne Town Centre</i> | 1.7 | 25.3 | 5.7 | 2.0 | 7.4 | 50.4 | 89.8 | 3.7 | 1.3 | 0.4 | 187.5 | 15.4 |
| <i>The Crumbles Retail Park, Eastbourne</i> | 0.0 | 1.5 | 0.5 | 0.0 | 1.1 | 4.9 | 9.2 | 0.2 | 0.2 | 0.0 | 17.7 | 1.5 |
| <i>Sovereign Harbour Retail Park, Eastbourne</i> | 0.0 | 0.0 | 0.4 | 0.1 | 0.3 | 9.5 | 5.6 | 1.2 | 0.0 | 0.0 | 17.0 | 1.4 |
| <i>Hampden Retail Park, Eastbourne</i> | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 2.4 | 11.0 | 0.2 | 0.0 | 0.0 | 13.9 | 1.1 |
| Tunbridge Wells | 0.0 | 7.6 | 6.8 | 0.5 | 5.7 | 1.4 | 6.4 | 37.6 | 4.7 | 1.7 | 72.5 | 6.0 |
| Central London | 0.5 | 1.0 | 3.9 | 0.6 | 1.2 | 3.8 | 1.0 | 0.8 | 1.1 | 1.1 | 15.1 | 1.2 |
| Lakeside Shopping Centre | 0.9 | 3.4 | 0.5 | 0.3 | 1.7 | 1.9 | 0.0 | 0.2 | 0.2 | 0.2 | 9.2 | 0.8 |
| Ashford | 0.1 | 0.7 | 0.7 | 0.7 | 0.3 | 0.0 | 0.0 | 0.1 | 3.1 | 5.2 | 11.0 | 0.9 |
| Brighton | 0.1 | 1.0 | 1.5 | 0.1 | 0.1 | 1.9 | 2.0 | 0.0 | 1.5 | 0.1 | 8.4 | 0.7 |
| All other locations outside survey area | 1.8 | 4.3 | 7.1 | 1.6 | 3.8 | 6.3 | 8.1 | 8.9 | 6.2 | 2.6 | 50.6 | 4.2 |
| Total for locations outside survey area (C) | 5.2 | 45.1 | 27.3 | 5.8 | 21.5 | 82.6 | 133.0 | 52.8 | 18.3 | 11.3 | 402.9 | 33.2 |
| Overall total (A+B+C) | 76.6 | 218.7 | 181.6 | 64.1 | 85.5 | 244.7 | 171.7 | 78.6 | 53.5 | 39.2 | 1214.2 | 100.0 |

Source: Table 3, Table 4

Hastings Borough Council Hastings Town Centre and White Rock Study 2015 Comparison Capacity Modelling

Table 6
Borough-wide comparison goods floorspace capacity

| | COMPARISON GOODS | | | |
|--|------------------|--------------|--------------|---------------|
| | 2015 | 2020 | 2025 | 2030 |
| Total Available Expenditure (£000) | 701,837 | 828,984 | 999,262 | 1,214,190 |
| Market Share from Survey Area | 30 | 30 | 30 | 30 |
| Survey Area Residents Spending Hastings Town Centre (£000) | 212,346 | 250,742 | 301,996 | 366,721 |
| Existing Retail Floorspace (sq.m net) | | | | |
| Existing Retail Floorspace (sq.m net) | 35,090 | 35,090 | 35,090 | 35,090 |
| Sales per sqm net £ | 6,051 | 6,567 | 7,127 | 7,735 |
| Sales from Existing Floorspace (£000) | 212,346 | 230,452 | 250,103 | 271,428 |
| Sales from Commitments (£000) | 0 | 0 | 0 | 0 |
| Residual Spending to support new floorspace (£000) | 0 | 20,290 | 51,893 | 95,293 |
| Sales per sq m net in new shops (£) | 6,000 | 6,512 | 7,067 | 7,669 |
| Capacity for new floorspace (sqm net) | 0 | 3,116 | 7,343 | 12,425 |

Assumes 1.65% pa growth in sales efficiency 2013-2035

APPENDIX 2: CONVENIENCE GOODS NEED PROJECTIONS

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015

Convenience Capacity Modelling

Table 1
Survey Population Forecasts

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 | Total |
|-----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|
| 2015 | 15,594 | 40,309 | 35,067 | 9,487 | 12,483 | 44,269 | 29,504 | 10,067 | 6,551 | 7,555 | 210,886 |
| 2020 | 16,082 | 41,577 | 36,191 | 9,795 | 12,926 | 45,812 | 30,414 | 10,438 | 6,798 | 7,799 | 217,832 |
| 2025 | 16,618 | 42,946 | 37,396 | 10,178 | 13,460 | 47,707 | 31,407 | 10,908 | 7,088 | 8,110 | 225,818 |
| 2030 | 17,130 | 44,287 | 38,564 | 10,547 | 13,974 | 49,555 | 32,321 | 11,364 | 7,363 | 8,415 | 233,520 |
| Change 2015-35 | 1,536 | 3,978 | 3,497 | 1,060 | 1,491 | 5,286 | 2,817 | 1,297 | 812 | 860 | 22,634 |

Source: Experian Micromarketer (October 2015)

Table 1A
Survey Area Postal Sectors

| Zone | Postal Sectors |
|---------|------------------------------|
| Zone 1 | TN34 1, TN37 6 |
| Zone 2 | TN37 7, TN38 0/8/9 |
| Zone 3 | TN34 2/3, TN35 5 |
| Zone 4 | TN35 4, TN36 4 |
| Zone 5 | TN33 0/9 |
| Zone 6 | TN39 3/4/5, TN40 1/2 |
| Zone 7 | BN24 5/6, BN27 1/2/4, TN21 9 |
| Zone 8 | TN19 7, TN32 5 |
| Zone 9 | TN31 6 |
| Zone 10 | TN31 7 |

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015

Convenience Capacity Modelling

Table 2
Survey Area Retail Expenditure Forecasts Per Capita (2013 prices) - Convenience Goods

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| 2013 | 1,953 | 2,192 | 2,139 | 2,503 | 2,427 | 2,216 | 2,245 | 2,654 | 2,738 | 2,179 |
| 2015 | 1,904 | 2,138 | 2,086 | 2,441 | 2,367 | 2,161 | 2,189 | 2,588 | 2,670 | 2,125 |
| 2015 Minus SFT at 2.8% | 1,851 | 2,078 | 2,028 | 2,373 | 2,301 | 2,100 | 2,128 | 2,515 | 2,595 | 2,066 |
| 2020 | 1,912 | 2,146 | 2,094 | 2,451 | 2,376 | 2,170 | 2,198 | 2,598 | 2,680 | 2,134 |
| 2020 Minus SFT at 4.0% | 1,835 | 2,061 | 2,011 | 2,353 | 2,281 | 2,083 | 2,110 | 2,494 | 2,573 | 2,048 |
| 2025 | 1,921 | 2,157 | 2,105 | 2,463 | 2,388 | 2,180 | 2,209 | 2,611 | 2,694 | 2,144 |
| 2025 Minus SFT at 5.0% | 1,825 | 2,049 | 2,000 | 2,340 | 2,269 | 2,071 | 2,098 | 2,481 | 2,559 | 2,037 |
| 2030 | 1,931 | 2,168 | 2,116 | 2,475 | 2,400 | 2,191 | 2,220 | 2,624 | 2,707 | 2,155 |
| 2030 Minus SFT at 5.7% | 1,821 | 2,044 | 1,995 | 2,334 | 2,264 | 2,066 | 2,093 | 2,475 | 2,553 | 2,032 |

Expenditure growth rates (pa): 2013-14: -0.7%, 2014-15: -1.8%, 2015-16: -0.2%, 2016-17: 0.1%, 2017-18: 0.3%, 2018-2030: 0.1%

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3
Survey Area Retail Expenditure Forecasts (2013 prices)

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 | Total |
|-----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) | (£m) |
| 2015 | 28.9 | 83.8 | 71.1 | 22.5 | 28.7 | 93.0 | 62.8 | 25.3 | 17.0 | 15.6 | 448.7 |
| 2020 | 29.5 | 85.7 | 72.8 | 23.0 | 29.5 | 95.4 | 64.2 | 26.0 | 17.5 | 16.0 | 459.6 |
| 2025 | 30.3 | 88.0 | 74.8 | 23.8 | 30.5 | 98.8 | 65.9 | 27.1 | 18.1 | 16.5 | 473.9 |
| 2030 | 31.2 | 90.5 | 76.9 | 24.6 | 31.6 | 102.4 | 67.7 | 28.1 | 18.8 | 17.1 | 489.0 |
| Change 2015-30 | 2.3 | 6.8 | 5.8 | 2.1 | 2.9 | 9.4 | 4.9 | 2.8 | 1.8 | 1.5 | 40.4 |

Source: Tables 1 & 2

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 4
Convenience Goods Allocation 2015 - % Market Share

| Zone | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Centre/Store | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) | (%) |
| Convenience goods floorspace in Hastings | | | | | | | | | | |
| Stores in zone 1 | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 20.62% | 5.09% | 23.97% | 12.90% | 0.41% | 2.01% | 0.00% | 2.49% | 1.80% | 12.03% |
| M&S, Priory Meadow Shopping Centre | 2.44% | 2.62% | 2.90% | 2.31% | 0.15% | 0.15% | 0.00% | 0.00% | 0.00% | 0.00% |
| Lidl, Bohemia Road | 9.49% | 5.34% | 5.00% | 2.20% | 4.54% | 0.00% | 0.00% | 3.01% | 7.07% | 1.49% |
| Co-op, 45-47 Bohemia Road, St Leonards | 8.20% | 0.51% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Sainsbury's Local, Station Approach, Hastings | 1.21% | 0.25% | 2.59% | 0.86% | 0.69% | 0.00% | 0.00% | 0.00% | 0.99% | 0.00% |
| Sub-total, zone 1 | 41.96% | 13.81% | 34.46% | 18.27% | 5.78% | 2.16% | 0.00% | 5.50% | 9.87% | 13.52% |
| Stores in zone 2 | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 12.7% | 16.2% | 12.3% | 18.4% | 19.4% | 0.2% | 0.0% | 21.9% | 17.6% | 6.6% |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 4.7% | 22.5% | 11.5% | 15.6% | 19.0% | 0.5% | 0.0% | 8.0% | 6.5% | 14.5% |
| Asda, Battle Road, St Leonards on Sea | 29.1% | 19.3% | 3.1% | 2.9% | 3.1% | 0.2% | 0.0% | 2.8% | 3.0% | 1.5% |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 0.0% | 3.0% | 2.8% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.2% | 0.2% |
| Sub-total, zone 2 | 46.5% | 61.0% | 29.7% | 36.9% | 41.5% | 0.8% | 0.8% | 32.8% | 27.3% | 22.8% |
| Stores in zone 3 | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 1.8% | 1.9% | 13.9% | 15.5% | 0.9% | 0.0% | 0.0% | 1.0% | 2.8% | 7.6% |
| Co-op, 4-6 Fairlight Road, Ore | 0.7% | 0.0% | 7.5% | 5.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Old London Road, Hastings | 0.0% | 2.4% | 1.0% | 1.4% | 2.1% | 0.0% | 0.2% | 0.3% | 2.5% | 3.6% |
| Iceland, 1 Castle Street, Hastings | 0.0% | 0.2% | 3.1% | 1.1% | 0.0% | 0.0% | 0.0% | 0.6% | 0.3% | 0.2% |
| Sub-total, zone 3 | 2.6% | 4.6% | 25.5% | 23.2% | 3.0% | 0.0% | 0.2% | 1.9% | 5.5% | 11.4% |
| Other stores in Hastings Borough | | | | | | | | | | |
| Other stores in Hastings Borough | 4.0% | 8.8% | 8.0% | 1.4% | 1.7% | 0.3% | 1.6% | 0.8% | 0.6% | 0.0% |
| Sub-total, other locations | 4.0% | 8.8% | 8.0% | 1.4% | 1.7% | 0.3% | 1.6% | 0.8% | 0.6% | 0.0% |
| Total for main stores in Hastings Borough (A) | 95.0% | 88.2% | 97.7% | 79.8% | 52.1% | 3.3% | 2.6% | 41.0% | 43.3% | 47.8% |
| Convenience goods floorspace outside Hastings | | | | | | | | | | |
| Other stores in survey area | | | | | | | | | | |
| Tesco, 4 Ravenside Retail Leisure Park | 2.04% | 6.93% | 0.68% | 0.95% | 2.22% | 33.98% | 0.00% | 0.00% | 0.43% | 0.21% |
| Sainsbury's, 1 Buckhurst Place, Bexhill on Sea | 0.00% | 0.00% | 0.19% | 0.00% | 1.35% | 20.71% | 0.00% | 7.79% | 0.52% | 0.00% |
| Tesco, North Street, Hailsham | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.15% | 26.11% | 0.00% | 0.00% | 0.00% |
| Aldi, 57-69 London Road, Bexhill-on-Sea | 0.00% | 2.80% | 0.00% | 0.69% | 3.78% | 13.76% | 0.69% | 1.30% | 0.00% | 0.00% |
| Lidl, 80 Ninfield Road, Bexhill on Sea | 0.00% | 0.42% | 0.00% | 0.18% | 6.50% | 6.17% | 0.70% | 0.65% | 0.00% | 0.00% |
| Waitrose, Vicarage Field, Hailsham | 0.00% | 0.00% | 0.00% | 0.00% | 0.33% | 0.51% | 11.26% | 0.00% | 0.00% | 0.00% |
| Jempson's, Main Street, Peashmarsh, Rye | 0.00% | 0.00% | 0.00% | 2.64% | 1.86% | 0.00% | 0.00% | 0.00% | 30.95% | 14.71% |
| Asda, 3 The Quintins, North Street, Hailsham | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.7% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Collington Avenue, Bexhill on Sea | 0.0% | 1.0% | 0.0% | 0.9% | 0.0% | 3.0% | 0.0% | 0.0% | 0.3% | 0.0% |
| Co-op, 4-6 Devonshire Road, Bexhill on Sea | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% |
| Jempson's, Station Approach, Rye | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 15.4% |
| Jempson's, Market Road, Battle | 0.0% | 0.0% | 0.0% | 0.0% | 10.6% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% |
| Sub-total, other stores in survey area (B) | 2.0% | 11.1% | 0.9% | 6.3% | 26.7% | 81.6% | 47.4% | 10.5% | 32.8% | 30.3% |
| Stores outside survey area | | | | | | | | | | |
| Asda, Pevensey Bay Road, Eastbourne | 0.0% | 0.0% | 0.6% | 0.0% | 0.4% | 2.3% | 16.7% | 0.0% | 0.0% | 0.0% |
| Sainsbury's, Broadwater Way, Eastbourne | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.8% | 5.3% | 0.0% | 0.0% | 0.0% |
| Morrisons, Lottbridge Drive | 0.0% | 0.0% | 0.0% | 0.4% | 0.7% | 1.1% | 4.5% | 0.2% | 0.0% | 0.0% |
| Sainsbury's, Station Road, Heathfield | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 3.6% | 3.2% | 0.0% | 0.0% |
| Waitrose, 10 Sayers Lane, Tenterden | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 2.2% | 9.4% | 2.8% |
| Sub-total, stores outside survey area (C) | 0.0% | 0.0% | 0.6% | 1.7% | 2.2% | 4.4% | 30.1% | 5.6% | 9.4% | 2.8% |
| Total for stores outside Hastings Borough (B+C) | 2.0% | 11.1% | 1.5% | 7.9% | 28.9% | 86.1% | 77.5% | 16.2% | 42.2% | 33.0% |
| Local convenience goods | | | | | | | | | | |
| Local / other shops in and outside survey area (D) | 3.0% | 0.7% | 0.8% | 12.3% | 19.0% | 10.7% | 19.9% | 42.8% | 14.5% | 19.2% |
| Total (A+B+C+D) | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: NEMS Household Survey results

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 5a
Convenience Goods Allocation 2015 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (Em) | Zone 2 (Em) | Zone 3 (Em) | Zone 4 (Em) | Zone 5 (Em) | Zone 6 (Em) | Zone 7 (Em) | Zone 8 (Em) | Zone 9 (Em) | Zone 10 (Em) | Total (Em) | Total (%) |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|---------------|
| Total Available Spend - 2015 | 28.9 | 83.8 | 71.1 | 22.5 | 28.7 | 93.0 | 62.8 | 25.3 | 17.0 | 15.6 | 448.7 | 100.0 |
| Convenience goods floorspace in Hastings | | | | | | | | | | | | |
| Stores in zone 1 | | | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 6.0 | 4.3 | 17.0 | 2.9 | 0.1 | 1.9 | 0.0 | 0.6 | 0.3 | 1.9 | 35.0 | 7.8% |
| M&S, Priory Meadow Shopping Centre | 0.7 | 2.2 | 2.1 | 0.5 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 5.7 | 1.3% |
| Lidl, Bohemia Road | 2.7 | 4.5 | 3.6 | 0.5 | 1.3 | 0.0 | 0.0 | 0.8 | 1.2 | 0.2 | 14.8 | 3.3% |
| Co-op, 45-47 Bohemia Road, St Leonards | 2.4 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.8 | 0.6% |
| Sainsbury's Local, Station Approach, Hastings | 0.4 | 0.2 | 1.8 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 3.0 | 0.7% |
| Sub-total, zone 1 | 12.1 | 11.6 | 24.5 | 4.1 | 1.7 | 2.0 | 0.0 | 1.4 | 1.7 | 2.1 | 61.1 | 13.6% |
| Stores in zone 2 | | | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 3.7 | 13.6 | 8.8 | 4.2 | 5.6 | 0.2 | 0.0 | 5.5 | 3.0 | 1.0 | 45.5 | 10.1% |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 1.4 | 18.8 | 8.2 | 3.5 | 5.5 | 0.4 | 0.0 | 2.0 | 1.1 | 2.3 | 43.2 | 9.6% |
| Asda, Battle Road, St Leonards on Sea | 8.4 | 16.2 | 2.2 | 0.7 | 0.9 | 0.1 | 0.0 | 0.7 | 0.5 | 0.2 | 29.9 | 6.7% |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 0.0 | 2.5 | 2.0 | 0.0 | 0.0 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 5.1 | 1.1% |
| Sub-total, zone 2 | 13.4 | 51.1 | 21.1 | 8.3 | 11.9 | 0.7 | 0.5 | 8.3 | 4.6 | 3.6 | 123.7 | 27.6% |
| Stores in zone 3 | | | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 0.5 | 1.6 | 9.9 | 3.5 | 0.3 | 0.0 | 0.0 | 0.3 | 0.5 | 1.2 | 17.7 | 4.0% |
| Co-op, 4-6 Fairlight Road, Ore | 0.2 | 0.0 | 5.3 | 1.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.7 | 1.5% |
| Tesco Express, Old London Road, Hastings | 0.0 | 2.0 | 0.7 | 0.3 | 0.6 | 0.0 | 0.1 | 0.1 | 0.4 | 0.6 | 4.9 | 1.1% |
| Iceland, 1 Castle Street, Hastings | 0.0 | 0.2 | 2.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 2.8 | 0.6% |
| Sub-total, zone 3 | 0.7 | 3.8 | 18.1 | 5.2 | 0.9 | 0.0 | 0.1 | 0.5 | 0.9 | 1.8 | 32.1 | 7.2% |
| Other stores in Hastings Borough | | | | | | | | | | | | |
| Other stores in Hastings Borough | 1.1 | 7.4 | 5.7 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 16.6 | 3.7% |
| Sub-total, other locations | 1.1 | 7.4 | 5.7 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 16.6 | 3.7% |
| Total for main stores in Hastings Borough (A) | 27.4 | 73.9 | 69.5 | 18.0 | 15.0 | 3.0 | 1.6 | 10.4 | 7.4 | 7.5 | 233.6 | 52.1% |
| Convenience goods floorspace outside Hastings | | | | | | | | | | | | |
| Other stores in survey area | | | | | | | | | | | | |
| Tesco, 4 Ravenside Retail Leisure Park | 0.6 | 5.8 | 0.5 | 0.2 | 0.6 | 31.6 | 0.0 | 0.0 | 0.1 | 0.0 | 39.4 | 8.8% |
| Sainsbury's, 1 Buckhurst Place, Bexhill on Sea | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 19.3 | 0.0 | 2.0 | 0.1 | 0.0 | 21.8 | 4.9% |
| Tesco, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 16.4 | 0.0 | 0.0 | 0.0 | 16.5 | 3.7% |
| Aldi, 57-69 London Road, Bexhill-on-Sea | 0.0 | 2.3 | 0.0 | 0.2 | 1.1 | 12.8 | 0.4 | 0.3 | 0.0 | 0.0 | 17.1 | 3.8% |
| Lidl, 80 Ninfield Road, Bexhill on Sea | 0.0 | 0.3 | 0.0 | 0.0 | 1.9 | 5.7 | 0.4 | 0.2 | 0.0 | 0.0 | 8.6 | 1.9% |
| Waitrose, Vicarage Field, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.5 | 7.1 | 0.0 | 0.0 | 0.0 | 7.6 | 1.7% |
| Jempson's, Main Street, Peashmarsh, Rye | 0.0 | 0.0 | 0.0 | 0.6 | 0.5 | 0.0 | 0.0 | 0.0 | 5.3 | 2.3 | 8.7 | 1.9% |
| Asda, 3 The Quintins, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.4 | 0.0 | 0.0 | 0.0 | 5.4 | 1.2% |
| Tesco Express, Collington Avenue, Bexhill on Sea | 0.0 | 0.8 | 0.0 | 0.2 | 0.0 | 2.7 | 0.0 | 0.0 | 0.1 | 0.0 | 3.8 | 0.9% |
| Co-op, 4-6 Devonshire Road, Bexhill on Sea | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 0.7% |
| Jempson's, Station Approach, Rye | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.4 | 2.7 | 0.6% |
| Jempson's, Market Road, Battle | 0.0 | 0.0 | 0.0 | 0.0 | 3.1 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.3 | 0.7% |
| Sub-total, other stores in survey area (B) | 0.6 | 9.3 | 0.6 | 1.4 | 7.7 | 75.9 | 29.8 | 2.7 | 5.6 | 4.7 | 138.2 | 30.8% |
| Stores outside survey area | | | | | | | | | | | | |
| Asda, Pevensey Bay Road, Eastbourne | 0.0 | 0.0 | 0.4 | 0.0 | 0.1 | 2.2 | 10.5 | 0.0 | 0.0 | 0.0 | 13.2 | 2.9% |
| Sainsbury's, Broadwater Way, Eastbourne | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.8 | 3.3 | 0.0 | 0.0 | 0.0 | 4.4 | 1.0% |
| Morrisons, Lottbridge Drove | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | 1.0 | 2.8 | 0.1 | 0.0 | 0.0 | 4.2 | 0.9% |
| Sainsbury's, Station Road, Heathfield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.3 | 0.8 | 0.0 | 0.0 | 3.2 | 0.7% |
| Waitrose, 10 Sayers Lane, Tenterden | 0.0 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.6 | 1.6 | 0.4 | 2.9 | 0.6% |
| Sub-total, stores outside survey area (C) | 0.0 | 0.0 | 0.4 | 0.4 | 0.6 | 4.1 | 18.9 | 1.4 | 1.6 | 0.4 | 27.9 | 6.2% |
| Total for stores outside Hastings Borough (B+C) | 0.6 | 9.3 | 1.1 | 1.8 | 8.3 | 80.0 | 48.6 | 4.1 | 7.2 | 5.2 | 166.1 | 37.0% |
| Local convenience goods | | | | | | | | | | | | |
| Local / other shops in and outside study area (D) | 0.9 | 0.6 | 0.6 | 2.8 | 5.5 | 9.9 | 12.5 | 10.8 | 2.5 | 3.0 | 49.0 | 10.9% |
| Overall total (A+B+C+D) | 28.9 | 83.8 | 71.1 | 22.5 | 28.7 | 93.0 | 62.8 | 25.3 | 17.0 | 15.6 | 448.7 | 100.0% |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 5b
Convenience Goods Allocation 2020 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|---------------|
| Total Available Spend - 2020 | 29.5 | 85.7 | 72.8 | 23.0 | 29.5 | 95.4 | 64.2 | 26.0 | 17.5 | 16.0 | 459.6 | 100.0 |
| Convenience goods floorspace in Hastings | | | | | | | | | | | | |
| Stores in zone 1 | | | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 6.1 | 4.4 | 17.4 | 3.0 | 0.1 | 1.9 | 0.0 | 0.6 | 0.3 | 1.9 | 35.8 | 7.8% |
| M&S, Priory Meadow Shopping Centre | 0.7 | 2.2 | 2.1 | 0.5 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 5.8 | 1.3% |
| Lidl, Bohemia Road | 2.8 | 4.6 | 3.6 | 0.5 | 1.3 | 0.0 | 0.0 | 0.8 | 1.2 | 0.2 | 15.1 | 3.3% |
| Co-op, 45-47 Bohemia Road, St Leonards | 2.4 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.9 | 0.6% |
| Sainsbury's Local, Station Approach, Hastings | 0.4 | 0.2 | 1.9 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 3.0 | 0.7% |
| Sub-total, zone 1 | 12.4 | 11.8 | 25.1 | 4.2 | 1.7 | 2.1 | 0.0 | 1.4 | 1.7 | 2.2 | 62.6 | 13.6% |
| Stores in zone 2 | | | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 3.7 | 13.9 | 9.0 | 4.2 | 5.7 | 0.2 | 0.0 | 5.7 | 3.1 | 1.1 | 46.6 | 10.1% |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 1.4 | 19.2 | 8.4 | 3.6 | 5.6 | 0.4 | 0.0 | 2.1 | 1.1 | 2.3 | 44.2 | 9.6% |
| Asda, Battle Road, St Leonards on Sea | 8.6 | 16.5 | 2.2 | 0.7 | 0.9 | 0.1 | 0.0 | 0.7 | 0.5 | 0.2 | 30.6 | 6.7% |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 0.0 | 2.6 | 2.0 | 0.0 | 0.0 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 5.2 | 1.1% |
| Sub-total, zone 2 | 13.7 | 52.3 | 21.6 | 8.5 | 12.2 | 0.8 | 0.5 | 8.5 | 4.8 | 3.6 | 126.6 | 27.6% |
| Stores in zone 3 | | | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 0.5 | 1.7 | 10.1 | 3.6 | 0.3 | 0.0 | 0.0 | 0.3 | 0.5 | 1.2 | 18.1 | 3.9% |
| Co-op, 4-6 Fairlight Road, Ore | 0.2 | 0.0 | 5.4 | 1.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.9 | 1.5% |
| Tesco Express, Old London Road, Hastings | 0.0 | 2.1 | 0.7 | 0.3 | 0.6 | 0.0 | 0.1 | 0.1 | 0.4 | 0.6 | 5.0 | 1.1% |
| Iceland, 1 Castle Street, Hastings | 0.0 | 0.2 | 2.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 2.9 | 0.6% |
| Sub-total, zone 3 | 0.8 | 3.9 | 18.5 | 5.3 | 0.9 | 0.0 | 0.1 | 0.5 | 1.0 | 1.8 | 32.9 | 7.2% |
| Other stores in Hastings Borough | | | | | | | | | | | | |
| Other stores in Hastings Borough | 1.2 | 7.5 | 5.8 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 17.0 | 3.7% |
| Sub-total, other locations | 1.2 | 7.5 | 5.8 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 17.0 | 3.7% |
| Total for main stores in Hastings Borough (A) | 28.0 | 75.6 | 71.1 | 18.4 | 15.4 | 3.1 | 1.7 | 10.7 | 7.6 | 7.6 | 239.1 | 52.0% |
| Convenience goods floorspace outside Hastings | | | | | | | | | | | | |
| Other stores in survey area | | | | | | | | | | | | |
| Tesco, 4 Ravenside Retail Leisure Park | 0.6 | 5.9 | 0.5 | 0.2 | 0.7 | 32.4 | 0.0 | 0.0 | 0.1 | 0.0 | 40.4 | 8.8% |
| Sainsbury's, 1 Buckhurst Place, Bexhill on Sea | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 19.8 | 0.0 | 2.0 | 0.1 | 0.0 | 22.4 | 4.9% |
| Tesco, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 16.8 | 0.0 | 0.0 | 0.0 | 16.9 | 3.7% |
| Aldi, 57-69 London Road, Bexhill-on-Sea | 0.0 | 2.4 | 0.0 | 0.2 | 1.1 | 13.1 | 0.4 | 0.3 | 0.0 | 0.0 | 17.6 | 3.8% |
| Lidl, 80 Ninfield Road, Bexhill on Sea | 0.0 | 0.4 | 0.0 | 0.0 | 1.9 | 5.9 | 0.4 | 0.2 | 0.0 | 0.0 | 8.8 | 1.9% |
| Waitrose, Vicarage Field, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.5 | 7.2 | 0.0 | 0.0 | 0.0 | 7.8 | 1.7% |
| Jempson's, Main Street, Peashmarsh, Rye | 0.0 | 0.0 | 0.0 | 0.6 | 0.5 | 0.0 | 0.0 | 0.0 | 5.4 | 2.3 | 8.9 | 1.9% |
| Asda, 3 The Quintins, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.6 | 0.0 | 0.0 | 0.0 | 5.6 | 1.2% |
| Tesco Express, Collington Avenue, Bexhill on Sea | 0.0 | 0.8 | 0.0 | 0.2 | 0.0 | 2.8 | 0.0 | 0.0 | 0.1 | 0.0 | 3.9 | 0.9% |
| Co-op, 4-6 Devonshire Road, Bexhill on Sea | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 0.7% |
| Jempson's, Station Approach, Rye | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.5 | 2.8 | 0.6% |
| Jempson's, Market Road, Battle | 0.0 | 0.0 | 0.0 | 0.0 | 3.1 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.3 | 0.7% |
| Sub-total, other stores in survey area (B) | 0.6 | 9.5 | 0.6 | 1.5 | 7.9 | 77.9 | 30.4 | 2.7 | 5.7 | 4.8 | 141.7 | 30.8% |
| Stores outside survey area | | | | | | | | | | | | |
| Asda, Pevensey Bay Road, Eastbourne | 0.0 | 0.0 | 0.5 | 0.0 | 0.1 | 2.2 | 10.7 | 0.0 | 0.0 | 0.0 | 13.5 | 2.9% |
| Sainsbury's, Broadwater Way, Eastbourne | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.8 | 3.4 | 0.0 | 0.0 | 0.0 | 4.5 | 1.0% |
| Morrisons, Lottbridge Drove | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | 1.1 | 2.9 | 0.1 | 0.0 | 0.0 | 4.3 | 0.9% |
| Sainsbury's, Station Road, Heathfield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.3 | 0.8 | 0.0 | 0.0 | 3.3 | 0.7% |
| Waitrose, 10 Sayers Lane, Tenterden | 0.0 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.6 | 1.6 | 0.4 | 2.9 | 0.6% |
| Sub-total, stores outside survey area (C) | 0.0 | 0.0 | 0.5 | 0.4 | 0.6 | 4.2 | 19.3 | 1.5 | 1.6 | 0.4 | 28.6 | 6.2% |
| Total for stores outside Hastings Borough (B+C) | 0.6 | 9.5 | 1.1 | 1.8 | 8.5 | 82.1 | 49.7 | 4.2 | 7.4 | 5.3 | 170.3 | 37.0% |
| Local convenience goods | | | | | | | | | | | | |
| Local / other shops in and outside study area (D) | 0.9 | 0.6 | 0.6 | 2.8 | 5.6 | 10.2 | 12.8 | 11.2 | 2.5 | 3.1 | 50.2 | 10.9% |
| Overall total (A+B+C+D) | 29.5 | 85.7 | 72.8 | 23.0 | 29.5 | 95.4 | 64.2 | 26.0 | 17.5 | 16.0 | 459.6 | 100.0% |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 5c
Convenience Goods Allocation 2025 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|---------------|
| Total Available Spend - 2025 | 30.3 | 88.0 | 74.8 | 23.8 | 30.5 | 98.8 | 65.9 | 27.1 | 18.1 | 16.5 | 473.9 | 100.0 |
| Convenience goods floorspace in Hastings | | | | | | | | | | | | |
| Stores in zone 1 | | | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 6.3 | 4.5 | 17.9 | 3.1 | 0.1 | 2.0 | 0.0 | 0.7 | 0.3 | 2.0 | 36.8 | 7.8% |
| M&S, Priory Meadow Shopping Centre | 0.7 | 2.3 | 2.2 | 0.6 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 6.0 | 1.3% |
| Lidl, Bohemia Road | 2.9 | 4.7 | 3.7 | 0.5 | 1.4 | 0.0 | 0.0 | 0.8 | 1.3 | 0.2 | 15.6 | 3.3% |
| Co-op, 45-47 Bohemia Road, St Leonards | 2.5 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.9 | 0.6% |
| Sainsbury's Local, Station Approach, Hastings | 0.4 | 0.2 | 1.9 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 3.1 | 0.7% |
| Sub-total, zone 1 | 12.7 | 12.2 | 25.8 | 4.4 | 1.8 | 2.1 | 0.0 | 1.5 | 1.8 | 2.2 | 64.4 | 13.6% |
| Stores in zone 2 | | | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 3.9 | 14.3 | 9.2 | 4.4 | 5.9 | 0.2 | 0.0 | 5.9 | 3.2 | 1.1 | 48.1 | 10.1% |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 1.4 | 19.8 | 8.6 | 3.7 | 5.8 | 0.4 | 0.0 | 2.2 | 1.2 | 2.4 | 45.5 | 9.6% |
| Asda, Battle Road, St Leonards on Sea | 8.8 | 17.0 | 2.3 | 0.7 | 1.0 | 0.2 | 0.0 | 0.8 | 0.5 | 0.3 | 31.4 | 6.6% |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 0.0 | 2.7 | 2.1 | 0.0 | 0.0 | 0.0 | 0.6 | 0.0 | 0.0 | 0.0 | 5.4 | 1.1% |
| Sub-total, zone 2 | 14.1 | 53.7 | 22.2 | 8.8 | 12.7 | 0.8 | 0.6 | 8.9 | 5.0 | 3.8 | 130.4 | 27.5% |
| Stores in zone 3 | | | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 0.6 | 1.7 | 10.4 | 3.7 | 0.3 | 0.0 | 0.0 | 0.3 | 0.5 | 1.3 | 18.7 | 3.9% |
| Co-op, 4-6 Fairlight Road, Ore | 0.2 | 0.0 | 5.6 | 1.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 7.1 | 1.5% |
| Tesco Express, Old London Road, Hastings | 0.0 | 2.1 | 0.7 | 0.3 | 0.6 | 0.0 | 0.1 | 0.1 | 0.5 | 0.6 | 5.1 | 1.1% |
| Iceland, 1 Castle Street, Hastings | 0.0 | 0.2 | 2.3 | 0.3 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.0 | 0.6% |
| Sub-total, zone 3 | 0.8 | 4.0 | 19.0 | 5.5 | 0.9 | 0.0 | 0.1 | 0.5 | 1.0 | 1.9 | 33.9 | 7.1% |
| Other stores in Hastings Borough | | | | | | | | | | | | |
| Other stores in Hastings Borough | 1.2 | 7.7 | 6.0 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 17.5 | 3.7% |
| Sub-total, other locations | 1.2 | 7.7 | 6.0 | 0.3 | 0.5 | 0.3 | 1.0 | 0.2 | 0.1 | 0.0 | 17.5 | 3.7% |
| Total for main stores in Hastings Borough (A) | 28.8 | 77.6 | 73.1 | 19.0 | 15.9 | 3.2 | 1.7 | 11.1 | 7.9 | 7.9 | 246.2 | 51.9% |
| Convenience goods floorspace outside Hastings | | | | | | | | | | | | |
| Other stores in survey area | | | | | | | | | | | | |
| Tesco, 4 Ravenside Retail Leisure Park | 0.6 | 6.1 | 0.5 | 0.2 | 0.7 | 33.6 | 0.0 | 0.0 | 0.1 | 0.0 | 41.8 | 8.8% |
| Sainsbury's, 1 Buckhurst Place, Bexhill on Sea | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 20.5 | 0.0 | 2.1 | 0.1 | 0.0 | 23.2 | 4.9% |
| Tesco, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 17.2 | 0.0 | 0.0 | 0.0 | 17.4 | 3.7% |
| Aldi, 57-69 London Road, Bexhill-on-Sea | 0.0 | 2.5 | 0.0 | 0.2 | 1.2 | 13.6 | 0.5 | 0.4 | 0.0 | 0.0 | 18.2 | 3.8% |
| Lidl, 80 Ninfield Road, Bexhill on Sea | 0.0 | 0.4 | 0.0 | 0.0 | 2.0 | 6.1 | 0.5 | 0.2 | 0.0 | 0.0 | 9.1 | 1.9% |
| Waitrose, Vicarage Field, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.5 | 7.4 | 0.0 | 0.0 | 0.0 | 8.0 | 1.7% |
| Jempson's, Main Street, Peashmarsh, Rye | 0.0 | 0.0 | 0.0 | 0.6 | 0.6 | 0.0 | 0.0 | 0.0 | 5.6 | 2.4 | 9.2 | 1.9% |
| Asda, 3 The Quintins, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.7 | 0.0 | 0.0 | 0.0 | 5.7 | 1.2% |
| Tesco Express, Collington Avenue, Bexhill on Sea | 0.0 | 0.9 | 0.0 | 0.2 | 0.0 | 2.9 | 0.0 | 0.0 | 0.1 | 0.0 | 4.1 | 0.9% |
| Co-op, 4-6 Devonshire Road, Bexhill on Sea | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.4 | 0.0 | 0.0 | 0.0 | 0.0 | 3.4 | 0.7% |
| Jempson's, Station Approach, Rye | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.5 | 2.9 | 0.6% |
| Jempson's, Market Road, Battle | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.5 | 0.7% |
| Sub-total, other stores in survey area (B) | 0.6 | 9.8 | 0.6 | 1.5 | 8.1 | 80.7 | 31.2 | 2.8 | 6.0 | 5.0 | 146.4 | 30.9% |
| Stores outside survey area | | | | | | | | | | | | |
| Asda, Pevensey Bay Road, Eastbourne | 0.0 | 0.0 | 0.5 | 0.0 | 0.1 | 2.3 | 11.0 | 0.0 | 0.0 | 0.0 | 13.9 | 2.9% |
| Sainsbury's, Broadwater Way, Eastbourne | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.8 | 3.5 | 0.0 | 0.0 | 0.0 | 4.6 | 1.0% |
| Morrisons, Lottbridge Drove | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | 1.1 | 2.9 | 0.1 | 0.0 | 0.0 | 4.4 | 0.9% |
| Sainsbury's, Station Road, Heathfield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 2.4 | 0.9 | 0.0 | 0.0 | 3.4 | 0.7% |
| Waitrose, 10 Sayers Lane, Tenterden | 0.0 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.6 | 1.7 | 0.5 | 3.0 | 0.6% |
| Sub-total, stores outside survey area (C) | 0.0 | 0.0 | 0.5 | 0.4 | 0.7 | 4.4 | 19.8 | 1.5 | 1.7 | 0.5 | 29.4 | 6.2% |
| Total for stores outside Hastings Borough (B+C) | 0.6 | 9.8 | 1.1 | 1.9 | 8.8 | 85.0 | 51.1 | 4.4 | 7.7 | 5.5 | 175.8 | 37.1% |
| Local convenience goods | | | | | | | | | | | | |
| Local / other shops in and outside study area (D) | 0.9 | 0.6 | 0.6 | 2.9 | 5.8 | 10.5 | 13.1 | 11.6 | 2.6 | 3.2 | 51.9 | 11.0% |
| Overall total (A+B+C+D) | 30.3 | 88.0 | 74.8 | 23.8 | 30.5 | 98.8 | 65.9 | 27.1 | 18.1 | 16.5 | 473.9 | 100.0% |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 5d
Convenience Goods Allocation 2030 - Spend (£) 2013 Prices

| Zone Centre/Store | Zone 1 (£m) | Zone 2 (£m) | Zone 3 (£m) | Zone 4 (£m) | Zone 5 (£m) | Zone 6 (£m) | Zone 7 (£m) | Zone 8 (£m) | Zone 9 (£m) | Zone 10 (£m) | Total (£m) | Total (%) |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|---------------|---------------|
| Total Available Spend - 2030 | 31.2 | 90.5 | 76.9 | 24.6 | 31.6 | 102.4 | 67.7 | 28.1 | 18.8 | 17.1 | 489.0 | 100.0 |
| Convenience goods floorspace in Hastings | | | | | | | | | | | | |
| Stores in zone 1 | | | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 6.4 | 4.6 | 18.4 | 3.2 | 0.1 | 2.1 | 0.0 | 0.7 | 0.3 | 2.1 | 37.9 | 7.8% |
| M&S, Priory Meadow Shopping Centre | 0.8 | 2.4 | 2.2 | 0.6 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 6.1 | 1.3% |
| Lidl, Bohemia Road | 3.0 | 4.8 | 3.8 | 0.5 | 1.4 | 0.0 | 0.0 | 0.8 | 1.3 | 0.3 | 16.1 | 3.3% |
| Co-op, 45-47 Bohemia Road, St Leonards | 2.6 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.0 | 0.6% |
| Sainsbury's Local, Station Approach, Hastings | 0.4 | 0.2 | 2.0 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 3.2 | 0.7% |
| Sub-total, zone 1 | 13.1 | 12.5 | 26.5 | 4.5 | 1.8 | 2.2 | 0.0 | 1.5 | 1.9 | 2.3 | 66.4 | 13.6% |
| Stores in zone 2 | | | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 4.0 | 14.7 | 9.5 | 4.5 | 6.1 | 0.2 | 0.0 | 6.2 | 3.3 | 1.1 | 49.6 | 10.2% |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 1.5 | 20.3 | 8.9 | 3.8 | 6.0 | 0.5 | 0.0 | 2.3 | 1.2 | 2.5 | 47.0 | 9.6% |
| Asda, Battle Road, St Leonards on Sea | 9.1 | 17.5 | 2.4 | 0.7 | 1.0 | 0.2 | 0.0 | 0.8 | 0.6 | 0.3 | 32.4 | 6.6% |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 0.0 | 2.7 | 2.1 | 0.0 | 0.0 | 0.0 | 0.6 | 0.0 | 0.0 | 0.0 | 5.5 | 1.1% |
| Sub-total, zone 2 | 14.5 | 55.2 | 22.9 | 9.1 | 13.1 | 0.8 | 0.6 | 9.2 | 5.1 | 3.9 | 134.5 | 27.5% |
| Stores in zone 3 | | | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 0.6 | 1.8 | 10.7 | 3.8 | 0.3 | 0.0 | 0.0 | 0.3 | 0.5 | 1.3 | 19.3 | 3.9% |
| Co-op, 4-6 Fairlight Road, Ore | 0.2 | 0.0 | 5.7 | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 7.3 | 1.5% |
| Tesco Express, Old London Road, Hastings | 0.0 | 2.2 | 0.8 | 0.4 | 0.7 | 0.0 | 0.1 | 0.1 | 0.5 | 0.6 | 5.3 | 1.1% |
| Iceland, 1 Castle Street, Hastings | 0.0 | 0.2 | 2.4 | 0.3 | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.1 | 0.6% |
| Sub-total, zone 3 | 0.8 | 4.1 | 19.6 | 5.7 | 1.0 | 0.0 | 0.1 | 0.5 | 1.0 | 2.0 | 34.9 | 7.1% |
| Other stores in Hastings Borough | | | | | | | | | | | | |
| Other stores in Hastings Borough | 1.2 | 8.0 | 6.2 | 0.3 | 0.6 | 0.3 | 1.1 | 0.2 | 0.1 | 0.0 | 18.0 | 3.7% |
| Sub-total, other locations | 1.2 | 8.0 | 6.2 | 0.3 | 0.6 | 0.3 | 1.1 | 0.2 | 0.1 | 0.0 | 18.0 | 3.7% |
| Total for main stores in Hastings Borough (A) | 29.6 | 79.8 | 75.2 | 19.6 | 16.5 | 3.4 | 1.8 | 11.5 | 8.1 | 8.2 | 253.7 | 51.9% |
| Convenience goods floorspace outside Hastings | | | | | | | | | | | | |
| Other stores in survey area | | | | | | | | | | | | |
| Tesco, 4 Ravenside Retail Leisure Park | 0.6 | 6.3 | 0.5 | 0.2 | 0.7 | 34.8 | 0.0 | 0.0 | 0.1 | 0.0 | 43.3 | 8.9% |
| Sainsbury's, 1 Buckhurst Place, Bexhill on Sea | 0.0 | 0.0 | 0.1 | 0.0 | 0.4 | 21.2 | 0.0 | 2.2 | 0.1 | 0.0 | 24.1 | 4.9% |
| Tesco, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 17.7 | 0.0 | 0.0 | 0.0 | 17.8 | 3.6% |
| Aldi, 57-69 London Road, Bexhill-on-Sea | 0.0 | 2.5 | 0.0 | 0.2 | 1.2 | 14.1 | 0.5 | 0.4 | 0.0 | 0.0 | 18.8 | 3.8% |
| Lidl, 80 Ninfield Road, Bexhill on Sea | 0.0 | 0.4 | 0.0 | 0.0 | 2.1 | 6.3 | 0.5 | 0.2 | 0.0 | 0.0 | 9.4 | 1.9% |
| Waitrose, Vicarage Field, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.5 | 7.6 | 0.0 | 0.0 | 0.0 | 8.2 | 1.7% |
| Jempson's, Main Street, Peashmarsh, Rye | 0.0 | 0.0 | 0.0 | 0.6 | 0.6 | 0.0 | 0.0 | 5.8 | 2.5 | 2.5 | 9.6 | 2.0% |
| Asda, 3 The Quintins, North Street, Hailsham | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.9 | 0.0 | 0.0 | 0.0 | 5.9 | 1.2% |
| Tesco Express, Collington Avenue, Bexhill on Sea | 0.0 | 0.9 | 0.0 | 0.2 | 0.0 | 3.0 | 0.0 | 0.0 | 0.1 | 0.0 | 4.2 | 0.9% |
| Co-op, 4-6 Devonshire Road, Bexhill on Sea | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 0.7% |
| Jempson's, Station Approach, Rye | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 2.6 | 3.0 | 0.6% |
| Jempson's, Market Road, Battle | 0.0 | 0.0 | 0.0 | 0.0 | 3.4 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 3.6 | 0.7% |
| Sub-total, other stores in survey area (B) | 0.6 | 10.1 | 0.7 | 1.6 | 8.4 | 83.6 | 32.1 | 3.0 | 6.2 | 5.2 | 151.3 | 30.9% |
| Stores outside survey area | | | | | | | | | | | | |
| Asda, Pevensey Bay Road, Eastbourne | 0.0 | 0.0 | 0.5 | 0.0 | 0.1 | 2.4 | 11.3 | 0.0 | 0.0 | 0.0 | 14.3 | 2.9% |
| Sainsbury's, Broadwater Way, Eastbourne | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.8 | 3.6 | 0.0 | 0.0 | 0.0 | 4.8 | 1.0% |
| Morrisons, Lottbridge Drive | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | 1.1 | 3.0 | 0.1 | 0.0 | 0.0 | 4.5 | 0.9% |
| Sainsbury's, Station Road, Heathfield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 2.5 | 0.9 | 0.0 | 0.0 | 3.5 | 0.7% |
| Waitrose, 10 Sayers Lane, Tenterden | 0.0 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.6 | 1.8 | 0.5 | 3.2 | 0.6% |
| Sub-total, stores outside survey area (C) | 0.0 | 0.0 | 0.5 | 0.4 | 0.7 | 4.5 | 20.3 | 1.6 | 1.8 | 0.5 | 30.3 | 6.2% |
| Total for stores outside Hastings Borough (B+C) | 0.6 | 10.1 | 1.2 | 2.0 | 9.1 | 88.1 | 52.4 | 4.5 | 7.9 | 5.7 | 181.6 | 37.1% |
| Local convenience goods | | | | | | | | | | | | |
| Local / other shops in and outside study area (D) | 0.9 | 0.6 | 0.6 | 3.0 | 6.0 | 10.9 | 13.5 | 12.0 | 2.7 | 3.3 | 53.7 | 11.0% |
| Overall total (A+B+C+D) | 31.2 | 90.5 | 76.9 | 24.6 | 31.6 | 102.4 | 67.7 | 28.1 | 18.8 | 17.1 | 489.0 | 100.0% |

Source: Table 3, Table 4

Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling

Table 6: Existing Convenience Goods Floorspace in Hastings

| | Total Net Fisp (Note A) (sq.m) | Net Conv Ratio (Note B) (%) | Net Convenience (sqm) | Co Average Sales (Note C) (£ per sqm net) | Average Turnover 2015 (£m) | Actual Turnover 2015 (£m) (Table 5a) | Inflow (%) | Inflow (£m) | Actual t/over including inflow (£m) | Difference from Avg Turnover 2015 (£m) |
|--|--------------------------------------|-----------------------------------|-----------------------------|---|----------------------------------|---|---------------|----------------|---|--|
| Stores in zone 1 | | | | | | | | | | |
| Morrisons, Queens Road, Hastings | 3,112 | 80% | 2,490 | 12,677 | 31.6 | 35.0 | 10% | 3.9 | 38.8 | 7.3 |
| M&S, Priory Meadow Shopping Centre | 821 | 95% | 783 | 10,963 | 8.6 | 5.7 | 10% | 0.6 | 6.3 | -2.3 |
| Lidl, Bohemia Road | 1,557 | 80% | 1,246 | 3,475 | 4.3 | 14.8 | 0% | 0.0 | 14.8 | 10.4 |
| Co-op, 45-47 Bohemia Road, St Leonards | 138 | 87% | 120 | 7,713 | 0.9 | 2.8 | 0% | 0.0 | 2.8 | 1.9 |
| Sainsbury's Local, Station Approach, Hastings | 150 | 90% | 135 | 12,010 | 1.6 | 3.0 | 5% | 0.2 | 3.1 | 1.5 |
| Sub-total, zone 1 | 5,778 | - | 4,774 | 9,851 | 47.0 | 61.1 | - | 4.7 | 65.8 | 18.8 |
| Stores in zone 2 | | | | | | | | | | |
| Sainsbury's, John Macadam Way, St Leonards on Sea | 4,825 | 72% | 3,484 | 12,010 | 41.8 | 45.5 | 10% | 5.1 | 50.6 | 8.7 |
| Tesco Extra, Church Wood Drive, St Leonards on Sea | 5,249 | 76% | 3,973 | 11,456 | 45.5 | 43.2 | 10% | 4.8 | 48.0 | 2.4 |
| Asda, Battle Road, St Leonards on Sea | 3,570 | 67% | 2,392 | 13,163 | 31.5 | 29.9 | 10% | 3.3 | 33.2 | 1.7 |
| Tesco Express, Little Ridge Avenue, St Leonards on Sea | 156 | 90% | 140 | 11,456 | 1.6 | 5.1 | 0% | 0.0 | 5.1 | 3.5 |
| Sub-total, zone 2 | 13,800 | - | 9,989 | 12,058 | 120.5 | 123.7 | - | 13.2 | 136.8 | 16.4 |
| Stores in zone 3 | | | | | | | | | | |
| Aldi, Rye Road, Hastings | 988 | 80% | 790 | 9,568 | 7.6 | 17.7 | 0% | 0.0 | 17.7 | 10.2 |
| Tesco Express, Old London Road, Hastings | 156 | 90% | 140 | 11,456 | 1.6 | 4.9 | 0% | 0.0 | 4.9 | 3.3 |
| Iceland, 1 Castle Street, Hastings | 310 | 97% | 301 | 7,210 | 2.2 | 2.8 | 0% | 0.0 | 2.8 | 0.7 |
| Sub-total, zone 3 | 1,454 | - | 1,232 | 9,207 | 11.3 | 25.4 | - | 0.0 | 25.4 | 14.1 |
| Total for Hastings Borough | 21,032 | | 15,995 | 11,180 | 178.8 | 210.2 | - | 17.8 | 228.1 | 49.3 |

**Hastings Borough Council
Hastings Town Centre and White Rock Study 2015
Convenience Capacity Modelling**

**Table 7
Convenience Goods Floorspace Capacity: Hastings Borough**

| | CONVENIENCE GOODS | | | |
|---|--------------------------|--------------|--------------|--------------|
| | 2015 | 2020 | 2025 | 2030 |
| Residents Spending in Hastings Borough (£m) | 210.2 | 215.3 | 223.6 | 228.5 |
| Existing Shop Floorspace within Hastings Borough (sq.m net) | 15,995 | 15,995 | 15,995 | 15,995 |
| Sales per sqm net £ | 13,144 | 11,180 | 11,349 | 11,520 |
| Sales from Existing Floorspace (£m) | 210.2 | 178.8 | 181.5 | 184.3 |
| Sales from Committed Floorspace (£m) | 0.0 | 0.0 | 0.0 | 0.0 |
| Residual Spending to support new shops (£m) | 210.2 | 36.4 | 42.1 | 44.2 |
| Sales per sqm net in new shops (£) Based on large store format | 12,000 | 12,181 | 12,365 | 12,551 |
| Capacity for new floorspace (sq.m net) | 0 | 2,990 | 3,401 | 3,521 |