



Wealden Town Centre Study

On behalf of Wealden District Council

July 2022

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Executive Summary

Introduction

1. Nexus Planning (Nexus), alongside AspinallVerdi and NEMS Market Research (NEMS) were commissioned by Wealden District Council in May 2021 to produce a Town Centre Study for the District. The Council are currently preparing the Local Plan for the plan period up to 2039. As such, this 2021 Study will form part of the evidence base upon which the emerging Local Plan will be based.
2. The following key elements have been completed as part of the Study:
 - A review of the latest government policy on retail, leisure, other town centre uses and town centres generally;
 - Updated assessment of the latest retail, leisure and other town centre uses, trends and impacts of these;
 - Town centre needs assessment including retail and leisure uses;
 - Health check assessments, in line with the requirements of the PPG;
 - Property market assessment and recommendations for high order town centres; and
 - Policy recommendations.
3. We set out below an Executive Summary, presenting the key findings of the elements set out above.

Retail & Leisure Trends

4. In order to set the scene for the Study, we have provided an overview of the recent trends that form the backdrop for retail, leisure and town centre activity at the present time. The retail property landscape in the UK has seen dramatic changes over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, during the 1990s and 2000s, the retail landscape changed following the increased introduction of retail warehouse parks and large out-of-town shopping centres and retail parks. More recently, the shift to 'town centre first' policy approach has seen a shift back to development focussed on town centre locations.

5. Set against an already volatile economy follow Brexit uncertainty, the UK economy has experienced a significant shock as a result of the Covid-19 pandemic. Following the emergence of the virus at the beginning of 2020, the subsequent restrictions on movement and behaviour through a series of national lockdowns have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline, which has had a knock on effect for retailing.
6. While the retail and leisure sectors are dynamic at the best of times, there is no denying that town centres are still feeling the impacts of the Covid-19 pandemic.
7. Consumer expectations are also continually evolving, producing a dynamic retail market. Providers operating in the market are required to evolve as a result of numerous dynamic factors, including: the characteristics of the UK population; consumer demands; popularity in private car ownership; planning policy; and digital advances. The diverse nature of factors, which form consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience.
8. Long-term trends such as online shopping have also impacted on the retail sector; however, despite the increasing popularity of shopping online, there will always be a need and demand for physical stores. The vast majority of convenience sales are made in store, and even when groceries are purchased online and delivered, the majority of orders are selected by staff from shelves in physical stores.
9. For comparison goods shopping, the requirement for physical stores is expected to remain as shoppers opt to enjoy the experience of viewing items in person. However, this shopping experience will need to evolve and diversify, seeking to engage shoppers on an experiential level. Whilst the sector is continually evolving and there are a number of ongoing success stories, recent headlines have focussed on failing retailers and store closures.
10. The greater availability of high street units for leisure purposes appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent leisure, and food and drink retailers as well as modern markets, which are frequently focussed around food and drink operators. New cinemas have been developed close to the shopping core, and other 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing and other seemingly niche pursuits, have been met with success. More generally, the gym market continues to perform

well.

11. There is a concern that the implications of the Covid-19 pandemic will be particularly felt on the leisure sector. The full impact on the leisure sector as a whole will really evolve throughout the remainder of 2022 and beyond, and it is clear that the industry is not 'in the clear' yet.

Town Centre Needs Assessment

Market Share and Performance

12. Given projected population growth by 2039 (13.7% across the defined Study Area, which extends beyond Wealden District's boundary), and accounting for changing in spending habits and online shopping, we project future spending of £675.0m in convenience goods, and £1,527.6m in comparison goods by 2039 in the same defined Study Area.
13. We then isolated where residents of the District undertook their convenience shopping trips. The results show that the District retains 55.4% (£332.1m) of its own residents' spending on convenience goods. Of this, town, district and local centres account for 45.0% of all spend carried out in the District, with a further 10.5% of convenience goods spending in Wealden carried out in out-of-centre foodstores.
14. Approximately 44.6% (£267.1m) of convenience goods trade 'leaks' elsewhere to destinations such as East Grinstead (9.6%), Eastbourne (8.0%), Royal Tunbridge Wells (5.5%) and Lewes (4.8%).
15. Compared to the Council's previous evidence base (Wealden Town Centre and Retail Study 2016), convenience spend retained within the District has slightly increased from 51.9% to 55.5% in 2021. Whilst the market share of the majority of centres has remained relatively consistent, rising or falling only one-percentage point, convenience goods spending in Hailsham Town Centre in particular has increased from 13.0% to 17.6%.
16. Based on the survey findings, we also estimate that comparison goods retailers within the District attracted a combined turnover of £209.4m at 2021. This represented a 24.2% market share of overall available comparison goods spending by Wealden residents (£864.8m). As with our findings for convenience goods spending, town centre locations are the most popular destination, accounting for 19.9% of the overall market share, with just 4.3% of comparison goods trade heading to out-of-centre facilities in Wealden District.
17. Leakage out of the District equated to 75.8% of comparison goods spending, which is indicative

of the geographic relationship of the District with other major towns nearby including Eastbourne to the south, and Royal Tunbridge Wells to the north. Both towns provide a larger offer of comparison goods, and therefore account for a significant proportion of leakage, attracting 21.3% and 20.4% respectively.

18. Assessed against the previous 2016 data, the leakage of comparison floorspace outside of the District has fallen slightly from 77.2% to 75.8% in 2021.
19. Within Wealden, spending on comparison goods in Hailsham has remained relatively constant (5.9%), whilst the draw of Heathfield has halved (from 6.2% to 2.9%), and spending to both Uckfield (4.2% to 5.3%) and Crowborough (2.6% to 4.1%) has grown.

Convenience Capacity

20. Based on the NEMS household survey, we identify that convenience retailers within Wealden District turnover an estimated £332.1m, less than the town centre stores' benchmark turnover, which is £345.3m at 2021. This 'under-trade' equates to -£13.1m of expenditure across the District at 2021, or 4.0% below company averages.
21. Further assessments of turnover against national company averages for benchmarking identified that facilities across each of Heathfield and Crowborough were 'under-trading', below national averages by -£12.0m and -£30.0m respectively. Conversely, convenience retailers in Hailsham were found to be significantly 'over-trading' above national averages by £28.1m, largely driven by the performance of the Tesco Superstore on North Street.
22. Once committed developments are accounted for, which equate to a net convenience floorspace of 565 sq m and an estimated turnover of £4.5m, we are then able to determine the extent of any residual expenditure, which is available to support additional convenience floorspace.
23. There is an initial negative capacity for additional convenience floorspace within the District (as a result of the District as a whole under-trading against national benchmarks). By 2026, we identify capacity for between 600 and 900 sq m net, rising over the plan period to between 3,300 and 4,800 sq m net by 2039. The majority of this capacity is a result of the inflow assumptions from neighbouring local authorities, rather than a direct result of additional population and spending from the District's residents.
24. However, capacity modelling does not necessarily equate to need. Given the poorer

performance of stores and overprovision of convenience goods floorspace within both Heathfield and Crowborough, we do not suggest that the Council would require additional convenience retail allocations over the plan period, particularly where these would further compete with existing town centre facilities.

Comparison Capacity

25. Taking account of inflow, population and expenditure growth and forecast floorspace efficiencies, we identify a small comparison goods deficit expenditure across the District of - £1.3m at 2026, rising to £26.1m by 2039. As with convenience capacity modelling, we have taken account of committed comparison retail goods floorspace, which equates to a total of 1,133 sq m, or £6.8m of committed comparison goods turnover.
26. Accounting for these commitments, we identify a residual expenditure deficit through to 2031, with a surplus of £6.4m arising at 2036, increasing to £14.8m at 2039. We go on to utilise average sales densities for high street retailers (the upper end of what could be achieved) to provide assumed minimum floorspace estimates and average sales densities for bulky goods retailers (the lower end of what could be achieved) to provide assumed maximum comparison goods floorspace capacity estimates.
27. This available residual spend equates to a comparison goods floorspace capacity arising by 2036 of between 600 sq m and 800 sq m, rising to an estimated capacity of between 1,300 sq m and 1,800 sq m at 2039. In light of the deficit in comparison goods floorspace capacity over the short to medium term, and the relatively minimal amount growth thereafter, we would not recommend that the Council seek to specifically allocate any additional comparison goods floorspace.

Leisure Capacity

28. We considered the market shares for the various different categories of leisure provision and our results and the findings of the household surveys showed that the District was largely self-sufficient in respect of indoor health and fitness (gyms) and pubs, bars and nightclubs. Wealden residents also regularly visited facilities in Eastbourne (particularly for cinema, restaurants and bingo) and Tunbridge Wells (bowling).
29. Whilst the Hailsham Aspires redevelopment plans propose improvements to existing leisure facilities that would be welcomed as part of any investment within the District's town centres, our benchmark capacity assessment did not identify any significant gaps in the leisure offer of

the District that would justify any further allocations.

30. In terms of restaurants, pubs, bars and cafés, we identified spending capacity for new operators over the plan period. However, as 'main town centre uses', new food and beverage facilities should consider the potential re-occupation of vacant floorspace following the Covid-19 pandemic in the first instance in accordance with the sequential test and 'town centre first' principles.

Health Check Assessments

31. With the backdrop of retail and leisure trends in mind, the Study has undertaken a health check assessment for each of the District's main town centres. The health check assessments provide a snapshot of the District's main district centres of Hailsham, Uckfield, Crowborough, and services centres of Heathfield, Polegate, Wadhurst and Forest Row.
32. The health check assessments build on our analysis of market trends. We supplement this analysis with three sources of new empirical evidence; our town and village centre surveys, stakeholder engagement, and responses to the NEMS Household Telephone Survey and NEMS In-Centre Survey. By combining the findings of our engagement with local groups, residents and businesses, the Household Survey results, our on-the-ground observations, and desktop research, we have built a picture of the current health of these centres, based on performance against the range of health check indicators as set out in the NPPF / PPG.
33. The key takeaways for each of the assessed centres are set out below:

Uckfield:

- The centre has a significantly lower number of vacant units (5.7%) compared to the UK average (12.0%), which is positive, particularly in light of the impact of the Covid-19 pandemic;
- The Tesco Superstore to the north of the B2102 is separated from the town centre to the west, potentially reducing the likelihood of linked trips with the Town Centre, and could be better connected;
- Availability of parking was found to be sufficient and easily accessible, with just shy of 1,000 parking spaces available in car parks within and around the centre;
- Improvements to the public realm across the centre, including increasing the amount of planting and larger trees would make for a more pleasant environment for both traders

and consumers. This is likely to assist both in increasing the amount of dwell time customer spend within the centre as well as promoting potential investment.

Hailsham

- Convenience floorspace in the town centre significantly exceeds the UK average of 15.3% at 31.8%, over double the average. This is a result of large floorplate supermarkets, which are an important draw to Hailsham;
- The number of vacant units within the centre is significantly lower than the UK average, a positive sign;
- In some areas, the centre appears tired and outdated and would benefit from public and urban realm improvements. In turn, improvements to the public realm may assist in encouraging further investment;
- The centre would benefit from an emphasis on independent and artisan units to diversify the current convenience offer, which is dominated by large superstores.

Crowborough

- The centre has a lower proportion of leisure services compared to the UK average; however the restaurant provision was generally considered to be a strength of the centre by stakeholders, that should be fostered;
- Crowborough has seen a reduction in vacant units since the last Wealden Retail and Town Centre Study was completed in 2016;
- There is a disconnect between the Morrisons Supermarket and the rest of the centre, and better links would benefit the overall connectivity of the centre;
- Pavements are narrow throughout the centre, and particularly along the High Street, and cars travel quickly along the High Street. This makes for a less enjoyable experience for pedestrians. Traffic calming may assist in reducing the speeds of motorists.

Heathfield

- Heathfield has a particularly high provision of convenience retail, both in terms of number of units and floorspace, and the centre has a low proportion of vacant units;
- Whilst the town centre has relatively wide pavements, the speed at which cars travel along the High Street detracts from the pedestrian environment. Implementation of

traffic calming measures may assist in managing the speeds of private vehicles travelling through the centre;

- The centre lacks leisure services, including restaurants. As a result, the centre has a poor evening economy, and this was identified in both the stakeholder consultation and the NEMS household survey;
- Public transport availability is limited within the centre, and therefore visitors are generally reliant on private vehicles;
- As servicing has been identified as an issue for traders, a joined up servicing strategy may assist in alleviating key pressure points.

Polegate

- The centre has a low vacancy level compared to the UK average. However, the town centre does not appear to attract visitors from outside the immediate catchment, playing only a localised, convenience role;
- There is an opportunity to capitalise on commuter trips to the railway station, which is not currently being taken advantage of;
- The centre has poor environmental quality and public realm improvements would be beneficial. In particular, the area around the train station and level crossing would benefit from upgrades;
- The centre suffers from congestion as a result of the level crossing in the centre of Polegate, and this was identified by both stakeholders and survey respondents as a key issue for the town.

Forest Row

- The centre has a good range of shopping and services available to meet the needs of the local population. In particular, there is a very good provision of leisure services and the evening economy is considered to be very strong;
- Vacancy levels within the centre have risen since 2015, to 12.5%; however, this is still broadly comparable with the UK average and is likely to come down again as the UK economy recovers;
- There is a lack of available car parking within the centre. More car parking was suggested

by respondents to the household survey as something that would encourage them to visit the centre more often.

Wadhurst

- There are currently 10 unoccupied units, primarily concentrated to the south-east of High Street and this accounts for 24.4% of the centre. Whilst this proportion is higher than the UK average, it is likely a short-term impact of the Covid-19 pandemic. Given the relative health of the centre generally, we would expect some of the vacant units to come back into use;
- Wadhurst comprises largely independent stores, which creates a niche centre and this should be further encouraged;
- There is a notable shortage of car parking within the centre, and this detracts from the visitor experience. Traffic is also an issue at peak times, including school drop-off and pick-up. Parking management is required in the centre;
- Public realm improvements would further enhance this already attractive centre.

Market Review & Town Centre Strategy

34. This study has also undertaken an assessment of the high order town centre commercial and residential property markets in Uckfield, Hailsham, Crowborough, Heathfield and Polegate. The commercial market analysis has identified the volume and key areas of activity for town centre provisions such as retail, food & beverage, office, cinema and theatre and health and fitness. Through consultations with commercial agents, we have cross-referenced the trends suggested by transactional data to see the level of demand for additional provisions in these sectors given the current market, as well as whether there are opportunities for growth across the town centres.
35. This study has also assessed the residential property market across the high-order town centres. We have assessed the volume of sales transactions in and around the high street areas, by property type, to establish whether there is demand for town centre living. We have also looked at development that is coming forward currently to identify the level of supply in the market. Consultation with local residential agents enables us to identify whether there are opportunities to expand the town centre residential markets. We have also analysed the retirement living markets in the town centres to establish the level of activity in this market and whether

retirement living operators would consider the high order town centres as suitable locations for this type of development.

36. We have undertaken site visits and used this property market analysis to formulate town centre recommendations for the future development of these high order town centres throughout the plan period. The key takeaways for each of our town centre property market assessments are set out below:

Uckfield

- Uckfield has a strong town centre commercial market that fulfils its' function within the district. The rail station's positioning provides good footfall and the town's evening economy attracts residents to the town centre at night.
- There is a limited offering of large-scale convenience retail. Aldi has made public that they are looking for floorspace in Uckfield although there may be issues with identifying suitable floorspace.
- The town centre residential market is less attractive to purchasers than larger housing types in the rural areas surrounding the town. This is unlikely to change unless significant investment in public realm and evening economies is provided.
- Significant residential development surrounding the town will likely increase demand for commercial services in this town centre and may lead to additional investment in the future.
- There are a number of town centre locations that offer opportunities for regeneration. Analysis of town centre sites for redevelopment could offer additional opportunities to attract national-scale brands to Uckfield.

Hailsham

- The supply of commercial floorspace appears to be meeting current demand in Hailsham. However, there are some issues around suitability of space for national-scale brands. Floorspace is affordable, which does provide opportunities for local businesses.
- The demand for town centre living is limited. Any development coming forward would most likely be flatted or terraced properties that are priced similarly to larger housing on the peripheries of the town. The market for town centre retirement living is strong however.

- There is known demand from Lidl and Aldi for floorspace in Hailsham. Accommodating this may enhance the retail offering from national-scale operators and attract other additional brands.
- Additional retail, food & beverage and evening economy provisions would likely increase demand for town centre living. Hailsham Aspires could increase town centre investment and the quality of the offer, which could in turn make town centre living more attractive to potential purchasers.
- There is significant Council land ownership within the town centre. The Council may wish to explore potential opportunities on sites such as Vicarage Lane to identify site-specific opportunities for regeneration.

Crowborough

- Crowborough's commercial market caters to the convenience needs of the local population, whilst most comparison retail is lost to Royal Tunbridge Wells. The town offers multiple national-scale convenience retail offerings, whilst abundant parking makes the town accessible.
- There is limited demand for town centre living. The lack of evening economy and restaurant provisions detracts from the idea of living on the high street and larger properties on the peripheries of the town are more attractive to purchasers.
Crowborough's transport links with London make it a viable commuting location (albeit the train station is located on the edge of the town) and there has been an influx of young, professional families buying in Crowborough and commuting to work; however, these purchasers are looking for larger housing types in greener locations.
- There is significant strategic residential development coming forward in the town that may lead to increased investment in the town centre. A growing population will increase demand for goods and services, which may lead to increased interest from national-scale commercial operators in the town.
- There is a strong local business base in the town centre. Focusing on enabling these types of businesses to grow through providing more affordable floorspace will strengthen the local offering in the town.

Heathfield

- Heathfield's commercial market functions to serve the convenience needs of the local population. There is a strong offering from national-scale brands given the town's size. However, the office and food & beverage markets are limited and focus again primarily on local needs.
- The town centre residential market is limited. The town's size means town centre living is not as appealing to buyers when larger properties are available for similar prices in nearby greener areas. Even with significant town centre investment, this is unlikely to improve and the absence of a station means the town is not a viable location for commuters to London.
- There are a number of town centre sites that are in need of redevelopment and provide opportunities for regeneration. Further site-specific analysis of ownership and site capacity may lead to opportunities to increase the aesthetic appeal of the high street as a whole.
- Public-led investment is likely required to improve the public realm of the town centre, as the market is unlikely to deliver this. In the long term, this public sector investment could lead to private sector investment in the town centre.

Polegate

- The location of Polegate station provides good footfall through the town centre. However, the majority of the commercial offering is small-scale and there is a lack of both convenience and comparison retail. National-scale brands are unlikely to consider Polegate as a viable location due to lack of population and also lack of suitable available floorspace.
- There has been no residential development near the high street for a number of years and the town centre residential market is limited. Plans for significant residential development to the south of Polegate are currently being considered. Ensuring that new residential development is well-linked to the town centre could help to increase demand for commercial goods and services.
- Polegate is also the only high order town centre without a Chamber of Commerce. Establishing this and focusing on the strong offering of local businesses could see the town's offering expand and meet the needs of any future residential development.

Policy Recommendations;

37. The study builds upon the previous sections summarise above and presents a series of recommendations for the Council to consider in the development of its policies within the emerging Local Plan to enhance the vitality and viability of the District's centres.
38. In terms of the Council's town centre hierarchy, we considered the position of the centres against the Council's adopted settlement hierarchy on the basis of our health check assessments. In summary, we consider Uckfield, Hailsham, Crowborough and Heathfield function as 'Town Centres', and Polegate, Forest Row and Wadhurst as 'District Centres'. We also advise that the Council continues to protect local centres that should be defined as small neighbourhood centres and parades of more than ten main town centre uses.
39. We also make a series of suggested revisions to the existing town centre boundaries and primary shopping areas, in particular contracting areas that are isolated, operate as a distinct separate parade of shops, or do not function as part of the collective retail, leisure, commercial and service offering of 'main town centre uses' that make up the relevant centres.
40. As identified through the quantitative town centre needs assessment modelling, we identified an initial negative capacity for both convenience and comparison goods floorspace in the early stages of the plan period, rising to between 3,300 sq m and 4,800 sq m (for convenience) and between 1,300 sq m and 1,800 sq m (for comparison) by 2039.
41. However, we do not recommend any specific need for new retail (or leisure) floorspace allocations over the plan period in keeping with PPG guidance on longer-term forecasting that such assessments focus on a limited five-year period, whilst also taking account of the lifetime of the plan.
42. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such any residents' dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground from our health check work and stakeholder engagement. In convenience terms, we note that the majority of statistical capacity identified towards the end of the plan period is a result of inflow modelling assumptions from outside of the District, whilst convenience stores across both Heathfield and Crowborough were found to be under-trading indicating that those centres are potentially over-stocked in terms of convenience retail floorspace. For comparison goods, we do not identify any capacity until 2031, at which point this is once again largely driven by inflow rather than a direct result of

additional population and spending from the District's residents. Not only did local agents suggest that there was sufficient space available at present to meet current levels of operator demand, but responses from the public surveys identified that the number of vacant units, general upkeep and investment in existing units and undeveloped sites detracted from the overall appeal of Wealden's centres. Additional spending over the plan period should be used to bolster existing or proposed stores within existing centres in the retail hierarchy.

43. Outside of defined town centre boundaries, main town centre uses should be resisted unless it can be demonstrated (in accordance with the NPPF and PPG) that such proposals would be compliant with the local impact and sequential tests, undertaken proportionately and commensurate to the scale of development proposed. In terms of the retail impact test, a local threshold of 350 sq m (GIA) is recommended.
44. We also suggest a new policy that provides support for flexible working practices and new formats, as well as proportionate reductions in floorspace to allow for amalgamations, subdivisions and redevelopments, as well as meanwhile uses, click and collect hubs, and events space. We recommend that the Council considers imposing conditions on new planning permissions for new non-retail Class E uses changing to retail in out-of-centre locations.
45. Finally, we suggest that longstanding vacant units within town centres be considered for alternative uses where it can be demonstrated that the unit is no longer viable, has been proactively marketed, and an alternative use would support the vitality and viability of the centre.
46. In terms of monitoring, the Council should continue to review the health, vitality and viability of its town centres, as well as any changes through Permitted Development Rights in order to understand the potential impact on its town centres.

1 Introduction

Instruction

- 1.1 Nexus Planning (Nexus), alongside AspinallVerdi and NEMS Market Research (NEMS) were commissioned by Wealden District Council in May 2021 to produce a Town Centre Study for the District. The Council are currently preparing the Local Plan for the plan period up to 2039. As such, this 2021 Study will form part of the evidence base upon which the emerging Local Plan will be based.
- 1.2 The approach adopted by Nexus and the project team has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (July 2021), Planning Practice Guidance (PPG), and the Use Classes Order (2020 amendments).
- 1.3 Accordingly, a fundamental objective of the Study is to produce a NPPF and PPG compliant Study, which provides the Council with an up-to-date objective assessment of retail, leisure and town centre needs and provision, as well as strategic and planning policy recommendations.
- 1.4 This is informed by modelling of spending patterns and population projections, health checks and market reports of the District's main centres including Hailsham, Heathfield, Uckfield, Crowborough and Polegate, as well as health checks of Wadhurst and Forest Row. We go on to provide suggested planning policy approaches and possible strategic responses to any prevalent or emerging issues in relation to the study's centres, town centre uses and retail and leisure generally.

Scope of Works

- 1.5 The following key elements have been completed as part of the Study:
 - A review of the latest government policy on retail, leisure, other town centre uses and town centres generally;
 - Updated assessment of the latest retail, leisure and other town centre uses, trends and impacts of these;
 - Town centre needs assessment;
 - Health check assessments, in line with the requirements of the PPG;
 - Property market assessment and town centre strategy; and
 - Policy recommendations.

- 1.6 In working through the scope of works, the project team have been mindful of the impact of the Covid-19 pandemic. While the Study was undertaken and drafted subsequent to any major lockdown or restrictions, the reality is that the impacts of the pandemic were and are still materialising. References to temporary closures of various retail and commercial leisure facilities may have changed following publication, as Government legislation responds to the constantly evolving picture presented by the pandemic.

Remainder of Report

- 1.7 In addressing the above scope of works, this report is comprised of the following chapters:
- **Chapter 2** sets the policy context for the study, including providing a review of the latest government policy on retail, leisure, other town centre uses and town centres generally;
 - **Chapter 3** provides an overview of the regional context for the Study;
 - **Chapter 4** sets the scene for the study by providing a summary of the latest retail and leisure trends and implications of these in planning for the future of town centres;
 - **Chapter 5** summarises the current state of the commercial and residential property markets and sets out the regional context;
 - **Chapter 6** defines the Study Area and describes the Household Survey undertaken to inform the capacity assessments of the study;
 - **Chapter 7** provides a summary of the retail and leisure capacity assessments and need within the District;
 - **Chapter 8** sets out a health check assessment of each of the main centres within the District;
 - **Chapter 9** provides a summary of the town centre strategies completed by AspinallVerdi; and
 - **Chapter 10** sets out our policy recommendations to be considered for Wealden District's emerging Local Plan.

2 National and Local Policy Context

Introduction

- 2.1 This chapter of the Study sets out the recent updates to the planning policy context, including updates to the National Planning Policy Framework (2021), hereafter, referred to as the NPPF; the National Planning Practice Guidance (PPG), as well as the recent changes to the Town and Country Planning (Use Classes) Order and Town and Country Planning (General Permitted Development Order).

National Planning Policy Framework

- 2.2 The NPPF was initially adopted on 27 March 2012, and the Government has since published updated versions of the NPPF on 24 July 2018, 19 February 2019 and 20 July 2021.
- 2.3 The NPPF provides for a 'presumption in favour of sustainable development'. It effectively instructs decision makers to support development unless there are clear negative environmental, social and/or economic impacts. The NPPF provides the national guidance against which all planning applications should be considered.
- 2.4 At paragraph 8, the NPPF sets out its economic objective – to help build a strong, responsive and competitive economy. This overarching economic objective is supported by Chapter 6 in the NPPF, which emphasises that significant weight must be given to supporting economic growth and productivity and that local business needs and wider opportunities for development must be taken into account.
- 2.5 Chapter 7 of the NPPF seeks to ensure the ongoing vitality of town centres. In particular, within this chapter, Paragraphs 86 to 91 promote and support new development and investment within the defined boundaries of town centres, recognising that town centres are at the heart of communities. Where town centres are in decline, the NPPF directs local planning authorities to plan positively for their future to encourage economic activity. The NPPF recognises the need for local authorities to promote the vitality and viability of their towns and cities through the promotion of competition and growth management.
- 2.6 Specifically, Paragraph 87 requires Local Planning Authorities (LPAs) to enforce a sequential approach when assessing planning applications for main town centre uses located outside of existing centres or not in accordance with an up to date Local Plan. To do this, local authorities

should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out-of-centre sites be considered. When reviewing edge of centre and out-of-centre proposals, they should give preference to accessible locations well connected to the town centre.

2.7 Paragraph 90 specifies that LPAs should require an impact assessment for retail and leisure development outside of town centres that are not in accordance with an up to date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq m. The impact assessment should assess:

- i the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- ii the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.

2.8 In summary, the NPPF endorses a 'town centre first' approach to all retail activity (including leisure). It stipulates that where retail and leisure proposals cannot be accommodated within, or, adjacent to the town centre, applicants have to demonstrate, through the dual application of the impact test and the sequential test that the development will not affect negatively upon the vitality and viability of town centres.

National Planning Policy Guidance

2.9 The PPG for 'Town Centres and Retail' (last updated 18 September 2020) sets out further practical details of the Government's aspirations on town centres. Some key headlines are as follows:

- Encourages a wide range of complementary uses in town centres, such as residential, employment, entertainment/leisure, healthcare and education uses, as well as temporary activities such as 'pop ups'.
- Recognises the potential for evening and night-time activities to increase economic activity, employment, diversification and to develop the 'unique brand' of a town centre.

- Promotes stakeholder engagement and involvement in shaping town centres, including the activities of Business Improvement Districts (BIDs), Local Economic Partnerships (LEPs), landowners and private sector businesses.
- Recommends Town Centre Strategy options which are realistic and based on the likely role and function of the centre, and which identify an appropriate mix of uses, the likely scale of need, and opportunities for improvement, including to the historic and natural environment.

2.10 In July 2019, additional indicators were added to the PPG's list for planning for town centres and high streets, including balance between independent and multiple stores, barriers to new businesses opening and existing businesses expanding, and opening hours and the extent to which there is an evening and night-time economy offer.

The Town and Country Planning (Use Classes) & (General Permitted Development) Orders

- 2.11 In recent years, the Government has focussed considerable effort on trying to promote diversification in town centres through Permitted Development Rights. In addition to traditional 'rights' where you could switch between uses within Use Class A in accordance with the General Permitted Development Order 2015 (GPDO), more recent rights have been granted in order to help diversify town centres and in order to reflect changing economic pressures. These include, subject to Prior Approval, the ability to convert a large number of uses to residential. Uses can include shops, financial and professional services, amusement arcades and casinos. There is also the commonly utilised ability to change office premises to residential.
- 2.12 To support new ventures and pop-ups and avoid buildings being left empty, a separate permitted development right allows a range of uses (such as offices, shops, financial and professional services, restaurants and cafes, hot food takeaways, assembly and leisure uses) to convert temporarily to another use (such as an office, shop, financial and professional service, restaurant) for a single continuous period of up to three years. This right allows start-ups to test a new business model, and then to seek planning permission for the permanent change of use on that or another site. The same right now allows for the temporary change of use to specific community uses (health centre, art gallery, museum, public library, public hall or exhibition hall) to provide a greater mix of uses on the high street and increase footfall, and bring community uses closer to communities.

- 2.13 These permitted development rights are an important component in the re-shaping of town centres throughout the UK. In June 2020, the Government announced plans to introduce a new use class for 'commercial, service and business' in town centres. This proposal simplifies the process of switching between main town centres uses. Consequently, The Town and Country Planning (Use Classes) Order 1987 was amended on 22 July 2020, and came into force in England on 1 September 2020 as the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020. The amendments to the Use Classes Order included revoking Parts A and D and introducing three new use classes (Use Class E, F1 and F2).
- 2.14 These amendments mean that uses previously falling into Use Class A1, A2 and A3 (such as shops, estate agents and restaurants), Use Class B1 (including offices), and specific uses within Use Classes D1 and D2 (such as gyms, doctors' surgeries and nurseries) are now combined within a single Use Class (Class E: 'Commercial, Business and Service').
- 2.15 Additional Use Classes F1: 'Learning and non-residential institutions' and F2: 'Local community' have also been created, amalgamating a number of previous Use Classes. Use Class F1 covers any use for the provision of education, display of works of art, museum, public library, public reading room, public hall, exhibition hall, for or in connection with public worship or religious instruction or as a law court. New Use Class F2 covers a shop selling mostly essential goods, including food, no larger than 280 square metres (sq m) and where there is no other such facility within 1,000m radius of the shop's location; a hall or meeting place for the local community; an area or place for outdoor sport or recreation, not involving motorised vehicles or firearms; and an indoor or outdoor swimming pool or skating rink.
- 2.16 In practice, because changes within a single Use Class would not constitute development, this means a number of new changes of use can be carried out without the need for planning permission, notwithstanding any physical changes to the building that may require planning permission/advertisement consent, such as to frontages and signage. Most notably, within Use Class E, a large shop can now freely change to a gym, an office, a restaurant, a nursery and any combination thereof.
- 2.17 The amendments also took a number of uses (such as pubs and bars, takeaways, music venues and cinemas) out of the Use Class Order, categorising them as 'Sui Generis' uses. Each of these uses now need planning permission for any changes to their use, providing further protection to valued local facilities (such as pubs) and further controls for town centres against potentially unwanted uses (such as takeaways).

- 2.18 In March 2021, an update was made to the GPDO setting out the Permitted Development Rights associated with Use Class E. Class MA allows for the change of use of these Use Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses using Use Class O). This permitted development right is subject to maximum size requirements, the property having been in use as Use Class E for 2 years and vacant for 3 months, as well as an application to the Council for 'Prior Approval' for consideration of impacts relating to transport, contamination, flood risk, noise, the provision of natural light and the potential effect of providing residential accommodation within an industrial area. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where the rights do not apply.
- 2.19 Article 4 directions are issued under article 4 of the GPDO, and allow Councils to withdraw permitted development rights from defined areas. However, after notifying the Secretary of State of their intention to make an Article 4 direction, the Secretary of State can intervene and modify or cancel an Article 4 if the direction is not considered to be justified.
- 2.20 In July 2021, paragraph 53 of the NPPF was updated setting out updated limitations for the use of Article 4 directions:

The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible.*

- 2.21 It should be noted that any existing Article 4 directions that currently restrict office-to-residential changes under the old GPDO Class O will still 'bite' until July 2022, so Councils have the opportunity to propose new Article 4 directions. However, there are currently no existing

Article 4 directions adopted by Wealden District Council that restrict a change of use from an office to residential use.

Wealden District Council Development Plan

2.22 The Wealden District Statutory Development Plan is currently comprised of three main documents adopted by the Council, including:

- Affordable Housing Delivery Local Plan (2016);
- Wealden District Core Strategy Local Plan (2013); and
- Saved policies of the adopted Wealden Local Plan (1998).

2.23 These documents should be read in conjunction with each other and the supporting Proposals Maps. There has been no notable update to the Statutory Development Plan since 2013 with respect to town centre policies.

Wealden District Core Strategy Local Plan (2013)

2.24 The Wealden District Core Strategy Local Plan was adopted in February 2013. The document provides a long-term spatial vision and strategic objectives for Wealden District, including the key elements and core delivery policies for achieving development and growth targets over the period to 2027.

2.25 The Core Strategy Local Plan identifies that there are five 'main' towns in Wealden, namely Crowborough, Hailsham, Heathfield, Polegate and Uckfield, however due to their location, environmental attributes, infrastructure and close proximity to larger towns and cities including Brighton and Hove, Eastbourne, Tunbridge Wells and Crawley/Gatwick, Wealden's towns have not grown to be significant centres in the South East.

2.26 In town centre hierarchy terms, Hailsham, Uckfield and Crowborough are defined as District Centres, while Heathfield, Polegate, Wadhurst and Forest Row are defined as Service Centres. Both the District Centres and Services Centres are the subject of full health check assessments later in this Study.

2.27 The key strategic policy relevant to retail and town centres is Policy WCS3 – Distribution of Employment (B Class) and Retail (convenience and comparison). The policy allocates new convenience and comparison floorspace to Uckfield and Hailsham, including broad locations.

- 2.28 The Core Strategy Local Plan aims to focus growth where it is most accessible and sustainable, whilst maintaining the balance between rural settlements and larger service centres. In turn leaving these settlements less at threat from the neighbouring influences.
- 2.29 The growth strategy presented in the Core Strategy Local Plan is now out-of-date. As the projections were set out from 2006. Once adopted, the new Local Plan will replace the Core Strategy.

'Saved Policies' of the Adopted Wealden Local Plan (1998)

- 2.30 The Wealden Local Plan was originally adopted in 1998. Whilst this plan is now dated, in 2007 a number of policies were saved by approval of the Secretary of State and remain part of the development plan.
- 2.31 Of key relevance, the town centre related saved policies are as below;
- BS3 – Town Business Areas;
 - BS4 – Business development within towns;
 - BS5 – Retention of existing businesses within towns;
 - SH2 – Main Shopping Areas;
 - SH3 – Service uses within main shopping areas;
 - SH4 – Amusement centres in main shopping areas;
 - SH5 – Business uses in main shopping areas; and
 - SH6 – Residential uses in main shopping areas.

- 2.32 The 1998 Local Plan highlights that the town centres within Wealden, namely Crowborough, Hailsham, Heathfield, Polegate and Uckfield, tend to offer employment opportunities, while the neighbourhood centres provides for the day to day needs of residents. The larger centres outside of Wealden District including Tunbridge Wells, Eastbourne, Brighton and Hove and Horsham/ Gatwick have major influence on shopping patterns.

New Wealden Local Plan

- 2.33 Wealden District Council are currently preparing a new local plan, and this Study will form part of the evidence base for that plan. The Council adopted its timetable for the Local Plan (known as its Local Development Scheme (LDS)) in July 2020 and this outlines the Council's timetable

for adopting a new Wealden Local Plan by the end of 2023. An [initial Direction of Travel consultation](#) was carried out between 23 November 2020 and 18 January 2021 and Chapter 8 of this document considered Town and Local Centres specifically setting out issues and challenges and potential policy options.

Neighbourhood Plans

2.34 Wealden District has three adopted Neighbourhood Plans, which are as follows:

- Herstmonceux – made July 2019;
- Hailsham – made July 2021; and
- Hellingly – made July 2021.

2.35 There are a further ten other designated neighbourhood areas within Wealden. Wadhurst Parish Council consulted on a draft Wadhurst Neighbourhood Plan between 16 June and 15 August 2021. Other areas currently in the process of preparing neighbourhood plans include Maresfield, Uckfield, East Hoathly, Hartfield, Horam and Ninfield.

Herstmonceux Neighbourhood Plan

2.36 Herstmonceux Parish Council produced the Herstmonceux Neighbourhood Plan covering the period 2017-2027, which was made in 2019.

2.37 Policy 5 relates to retail development in the Parish, which seeks to ensure that change of use in the centre supports the wider vitality, viability and amenity of the local area and supports measures that will encourage sustainable travel.

Hailsham Neighbourhood Plan

2.38 The Hailsham Neighbourhood Plan was made in 2021 and provides the vision for Hailsham over the period to 2028. The Neighbourhood Plan aims to bring the residents and businesses of Hailsham together as a stronger, more inclusive community.

2.39 The NPPF encourages the use of planning to support 'strong, vibrant and healthy communities' and improve the vitality and competitiveness of town centres. This has influenced Chapter 12 of the Neighbourhood Plan: Hailsham Town Centre.

2.40 Chapter 12 details policies specific to Hailsham Town Centre. These policies comprise of;

- Policy HAIL TC1 – Hailsham Town Centre;

- Policy HAIL TC2 – Town centre design principles;
- Policy HAIL TC4 – Town centre car parking;
- Policy HAIL TC5 – Shopfronts; and
- Policy HAIL TC6 – Streets and spaces in the town centre.

2.41 Collectively, these policies seek to encourage complimentary town centre uses and community activities, set out the key local town centre design principles and shopfront design parameters, parking provision considerations as well as measures to enhance public realm in the town centre.

Local Plan Evidence Base

Wealden Town Centre and Retail Study 2016

2.42 The previous retail study, named the Wealden Town Centre and Retail Study 2016 was prepared by Carter Jonas. The Study includes health check assessments of each of the seven centres and the key, substantive takeaways for each are set out below:

2.43 Hailsham:

- Hailsham Town Centre does not benefit from good legibility and links between the main foodstores and primary shopping areas;
- The quality of the environment is poor, and would benefit from significant investment;
- The two main shopping centres, Vicarage Fields and Quintins, are dated and do not cater well for modern retailers (size, layout and visibility); and
- Relatively good mix of leisure services, but would benefit from more up-market provision.

2.44 Uckfield:

- Well served by supermarkets, and generally has a good mix of multiple and independent retailers, though lacks comparison anchors;
- The centre's overall offer is dominated by services, and there is a good mix of cafes and restaurants as well as a cinema, that helps to underpin the evening economy;
- The quality of the environment is mixed, and public realm could be improved; and

- Traffic issues are a weakness of the centre, and this can detract from the overall shopping experience.

2.45 Crowborough:

- The centre is anchored by Waitrose, Morrisons and Lidl and is complemented by smaller independent convenience stores that provide an important mix;
- Free parking is an important asset to the centre and should be retained. Whilst free parking is available across Wealden's centres, it is specifically identified as an important aspect for Crowborough;
- The centre has an important provision of independent units, which should be fostered to sustain its attractiveness and to compete with nearby centres; and
- The majority of the town has an attractive environment.

2.46 Heathfield:

- The centre has a good provision of convenience supermarkets, however the comparison goods offer is limited;
- The centre has a relatively pleasant environment, and benefits from easy pedestrian movement and free parking;
- The centre lacks a focal point, or public open space; and
- Opportunities to relocate the market to a more visible or prominent location should be explored.

2.47 Polegate

- The mix of uses adequately meets the basic needs of the local population, although there is an opportunity to improve the convenience offer; and
- The centre lacks character and identity, and would benefit from public realm improvements to make the centre more attractive.

2.48 Forest Row

- Predominantly meets the day-to-day needs of the local area;

- Mix of uses which are largely dominated by independent and specialist retailers, providing a niche offer; and
- Relatively pleasant built environment with good accessibility, although the capacity of the parking provision could be improved.

2.49 Wadhurst

- Good mix of uses that includes comparison and convenience outlets, which are popular with the local community;
- The offer is dominated by independent retailers, which are an important contributor to the centre's attraction;
- The centre has a pleasant built environment, however parking management could be improved; and
- The centre had no vacancies at the time of the surveys, indicating that the retail market was strong at the time (this has since increased to 24%, which is discussed in further detail in the following Chapters).

2.50 The Study also undertook a retail floorspace needs and demand assessment, including setting out a capacity assessment from a base year of 2016 for retail floorspace over what would have been the plan period for the now withdrawn Wealden Local Plan (2019). The capacity assessment forecasted that by 2037 there would be capacity for 4,695 sq m of convenience floorspace, and 11,231 sq m of comparison goods floorspace across the District.

2.51 The Retail Study set out the suggested options and recommendations. It sets out high level advice on how the local planning authority can effectively plan for, manage and promote the vitality and viability of both their main town and local centres over the development plan period, covering Uckfield, Hailsham, Crowborough, Heathfield, Polegate, Forest Row and Wadhurst.

2.52 The Study identified that Hailsham Town Centre was the only centre where there was a potential for pressure for retail space in the long term, which may have resulted in the need to extend the town centre boundary. In other main centres, the Study advised that their long-term futures and development potential could be secured through the preparation of a mix of planning and development briefs, masterplans/Area Action Plans (AAPs) and other initiatives to

help attract new investment and development to the right sites at the right time. This would help to manage and curate the optimum mix of new retail and town centre uses.

Wealden Economy Study Update 2013-2026 and Eastbourne and Wealden Employment and Economic Study 2019-2039

- 2.53 The Wealden Economy Study (2016) was first prepared in 2016 by Regeneris. Regeneris also prepared the Wealden Economy Study Update (2013-2028) in 2018. The Study considered different economic scenarios and provided forecasts for employment floorspace need. An updated joint Eastbourne and Wealden Employment and Economic Study has since been commissioned and issued in draft by Icení and Cambridge Econometrics.
- 2.54 The Study identified modest office market growth across the last 20-years in Wealden, whilst the industrial market has grown significantly above UK and regional averages. In terms of overall need for office floorspace to 2039, the Study identified *"a limited shortfall in office requirements of -1.5 to -5.7 ha that can be met through mixed use allocations and through encouraging conversions or developments in the town centres"*.
- 2.55 The Study also identified a significantly greater need for industrial and warehousing floorspace of -39.1 ha over the same period. Whilst the need for warehousing does relate to town centres in terms of servicing and competing out-of-town interests, it is less relevant in the context of the scope of this Town Centre Study.

3 Regional Context

Sub-Regional Centres

- 3.1 Wealden District is located nearby to a number of larger town centres that provide a broad retail offering. In this context, we have undertaken a review of the key competing centres in the region, to provide an overview of the sub-regional situation for the remainder of the Study.

Royal Tunbridge Wells

- 3.2 Royal Tunbridge Wells is a Primary Regional Centre to the north of Wealden District. The centre is generally a favoured shopping destination for those living in the north of Wealden District, having 670 retail units, and receiving an estimated 4.7m visitors per annum. The retail offer is extensive, offering a significantly broader range than any of the centres within Wealden. According to the most recent retail study, prepared in 2020¹, 34.7% of the overall retail offer is comparison goods, which is typical of a larger centre with broad range of goods.
- 3.3 Royal Tunbridge Wells Town Centre also has a thriving leisure and evening economy, with a broad range of restaurants and cafes. While the town centre does not have a dedicated cinema, there is an Odeon Cinema, Hollywood Bowl located in an out of centre location to the north of the town and longstanding plans for the provision of a cinema within the town centre.

Eastbourne

- 3.4 Eastbourne is the main shopping destination for residents living to the south of Wealden District, and it has a significantly larger retail offer than any of the centres in Wealden District, with more than 600 retail units. The two main areas for retailers are the Seafront and Terminus Road. The Seafront is a key tourist destination featuring a concentration of hotels and supporting services that serve as an important driver for the wider town economy, while Terminus Road is an important spine running broadly east to west through the Town Centre, housing the more traditional mix of town centre uses. Shopping in the centre is also focussed towards The Beacon Shopping Centre, which underwent renovations and a significant rebrand and extension adding 175,000 sq ft in 2018, including restaurants and a cinema. Further improvements including new access and all-weather doors were added in 2020.

¹ Tunbridge Wells Retail and Leisure Study Update, Nexus Planning 2020

Brighton

- 3.5 Brighton is designated as a Regional Town Centre located within Brighton and Hove City, and the largest town centre in the wider sub-region, with the most recent published retail study² identifying 1,205 retail units (this does not include Hove Town Centre, located two-miles to the west of Brighton). Of the retail offer, 48.0% were comparison retailers. While this proportion is likely to have reduced since the Retail Study update was completed in 2011, with all likelihood the revised proportion will still be relatively high.
- 3.6 Brighton receives an estimated 9.5m visitors per year, and has a high quality offer of leisure services, and food and beverage outlets. Brighton caters for a high number of tourists each year, and therefore has a range of cultural activities that also draw residents of the wider region.

Lewes

- 3.7 Lewes Town Centre is the principal shopping centre in the Lewes District, and the largest, comprising 344 units. The centre is located to the south west of Wealden District. The centre's retail offer, which features an historic and attractive shopping environment is focused around the High Street, Cliffe High Street and the Friars/Eastgate Shopping Centre. The centre's historic attractions and its setting within the South Downs National Park attracts significant visitor and tourist spend. The most recent retail study³ for Lewes District sets out that this is reflected by its retail, food and beverage offer.

East Grinstead

- 3.8 East Grinstead is a designated town centre of 229 units⁵ in Mid Sussex District, to the north of Wealden. The town is one of the oldest in the County, located within the High Weald Area of Outstanding Natural Beauty (AONB), with the majority of the High Street designated as a conservation area. Retailers are primarily located on London Road and the High Street includes historic features, such as a row of 14th century timber framed Tudor and Medieval buildings. The centre is characterised by a high proportion of independent retailers.

Bexhill

- 3.9 Bexhill Town Centre is located on the coast within Rother District, to the east of Wealden District. The centre comprises 311 retail units, a high proportion of which were made up of

² Brighton Retail Study Update, CBRE 2011

³ Lewes District Shopping and Town Centre Study, GL Hearn 2012

comparison goods retailers and services⁴. Bexhill is allocated as the location for retail growth within the Council's Development and Site Allocations Local Plan (2019).

Haywards Heath

- 3.10 Haywards Heath Town Centre is located to the west of the District and is comprised of 223 retail units, according to the most recent retail study⁵. Of that total, 37.7% were comparison retailers. The centre receives an estimated 1.2m visitors annually, according to recent footfall data. While Haywards Heath is important in the broader regional context, it does not compete with the likes of Royal Tunbridge Wells, Brighton, or Eastbourne.

Duty to Cooperate

- 3.11 In accordance with the Duty to Cooperate, as prescribed in paragraph 24 of the NPPF, Nexus has collaborated with Officers in neighbouring local planning authorities in order to identify pipeline schemes within regional centres. The pipeline schemes of interest are those of a nature and scale which could have the effect of consolidating or significantly enhancing their market share, which might in turn have the effect of drawing further trade away from Wealden. In this instance, we consider this to be developments comprising at least 1,000 sq m of retail or leisure floorspace (although the nature of the proposal will also be relevant).
- 3.12 A number of forthcoming retail and leisure developments have been highlighted in the following local authority areas.

Sevenoaks

- 3.13 Representatives of Sevenoaks have provided a list of extant permissions for retail development in the District; however, all permissions noted were small in scale, none involving new retail floorspace of more than 500 sq m that were likely to substantially alter spending patterns in Wealden District.

Tunbridge Wells

- 3.14 Representatives from Tunbridge Wells Borough Council have provided a list of extant permissions for retail development in the Borough. While the majority of applications are small in scale, officers have highlighted the extant permission at the Former ABC Cinema Site, Mount Pleasant Road in Royal Tunbridge Wells. Whilst it is unclear if the scheme will progress

⁴ Retail Capacity Study of Bexhill-on-Sea, GVA 2018

⁵ Mid Sussex Retail Study, Nexus Planning 2022

following re-marketing of the site, the permission (ref.: 19/01869/FULL) is for mixed use development comprising retail uses, restaurants, cinema, 108 dwellings, car and cycle parking, highway works, and public realm improvements. Overall, the scheme seeks to incorporate 1,389 sq m of retail floorspace.

Eastbourne

- 3.15 In Eastbourne Borough, three permissions that involve floorspace of 1,000 sq m or more were identified by representatives. Two permissions related to retail units within the Crumbles Retail Park in Eastbourne. The first (application ref.: 180666) was for a change of use at ground and first floor from a Cinema to retail floorspace (3,323 sq m), while the other (application ref.: 180667) was for an extension of the existing mezzanine floorspace for retail purposes (1,579 sq m). These schemes are unlikely to result in a marked shift in existing trading patterns, but have the potential to secure any existing leakage from the District to Eastbourne by making such trips more attractive.
- 3.16 The other permission of note (which has recently been completed) was at the Dunelm store at Hampden Park, involving internal works to create additional mezzanine floorspace of 1,433 sq m (application ref.: 200810).
- 3.17 The Langney Shopping Centre in Eastbourne has also been expanded to provide 13 additional retail and restaurant units, though the occupation of these units has been delayed as a result of reduced occupier interest during the Covid-19 pandemic.
- 3.18 In addition to the extant permission, representatives identified one current application involving retail floorspace that is yet to be determined. The relevant site is Land at Tesco Car Park, 21 Lottbridge Drove, with the application for the relocation of the Click and Collect facility from the car park to the Tesco store with associated works, re-configuration of parts of the existing store and car park to provide two coffee shops with drive-through facilities, equating to 352 sq m.

South Downs National Park

- 3.19 The South Downs National Park Authority identified only one permission of note, this being an application for the redevelopment of a retail unit at Brooks Road, Lewes, with associated parking, servicing and landscaping to include a 1,254 sq m retail space. The application reference is SDNP/18/05206/FUL.

Tandridge

- 3.20 Officers from Tandridge have not identified any relevant extant retail or commercial approvals of over 1,000 sq m.

Mid Sussex

- 3.21 Officers from Mid Sussex District Council did not identify any extant permissions comprising at least 1,000 sq m of retail or leisure floorspace.

Rother

- 3.22 Officers from Rother District Council did not identify any extant permissions comprising at least 1,000 sq m of retail or leisure floorspace.

Lewes

- 3.23 Officers from Lewes District Council did not identify any extant permissions comprising at least 1,000 sq m of retail or leisure floorspace.

4 Retail and Leisure Trends

Introduction

- 4.1 In order to set the context for this Study, we have provided an overview of the recent and current retail and leisure trends below. In reading the review below, it should be noted that the retail and leisure sectors are dynamic and, whilst recent phenomena such as the Covid-19 pandemic, and long term trends such as online shopping have impacted on the retail sector, new retailers and new formats continue to evolve to meet shoppers' needs. The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions.
- 4.2 The following sections provide commentary on the following key topics:
- The rise and fall of the retail sector in the UK;
 - Covid-19 and the current state of the UK economy;
 - The impact of the internet and special forms of trading;
 - Convenience goods trends;
 - Comparison good trends; and
 - Leisure, food and drink trends.
- 4.3 At chapter 5, we go on to provide an analysis of the commercial property market and the residential property market.

The rise and fall of the retail sector in the UK

- 4.4 Since the 1950s, the UK retail market has in general, experienced expansive growth. The rate of which the growth is occurring has increased in speed in recent years. The level of growth is resultant of several influencing factors:
- Improving standards of living;
 - A population with higher disposable incomes;
 - The popularity of obtaining fiscal credit;
 - Changes in modes of transport; and
 - New (digital) technologies, including online retailing.

- 4.5 The economic climate that prevailed following the 2008 recession had substantial impacts on the retail market; by restricting resident incomes and reducing standards of living. In consequence, the level of spending retracted. Since 2013 (recognised as being the end of the recession in the UK), the economy had slowly regained momentum and by 2016, economic activity was broadly back to pre-recession levels of economic activity.
- 4.6 The Brexit vote in 2016 and subsequent triggering of Article 50 had a negative impact on business and consumer confidence. During 2017, the consumer economy tightened, with rising inflation and slowing wage growth. Experian reported that 2017 saw the UK shift from being one of the fastest growing G7 economies to one of the slowest⁶. The combination of Brexit and the 2017 general election exacerbated the uncertain retail environment.
- 4.7 The retail property landscape in the UK has also seen dramatic changes over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, during the 1990s and 2000s, the retail landscape changed following the introduction of retail warehouse parks and large out-of-town shopping centres and retail parks. More recently, the shift to a 'town centre first' policy approach has seen a shift back to development focussed on town centre locations.
- 4.8 Consumer expectations are also continually evolving, producing a dynamic retail market. Providers operating in the market are required to evolve as a result of numerous dynamic factors, including: the characteristics of the UK population; consumer demands; popularity in private car ownership; planning policy; and digital advances. The diverse nature of factors, which form consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience.

Covid-19 and the Current State of the UK Economy

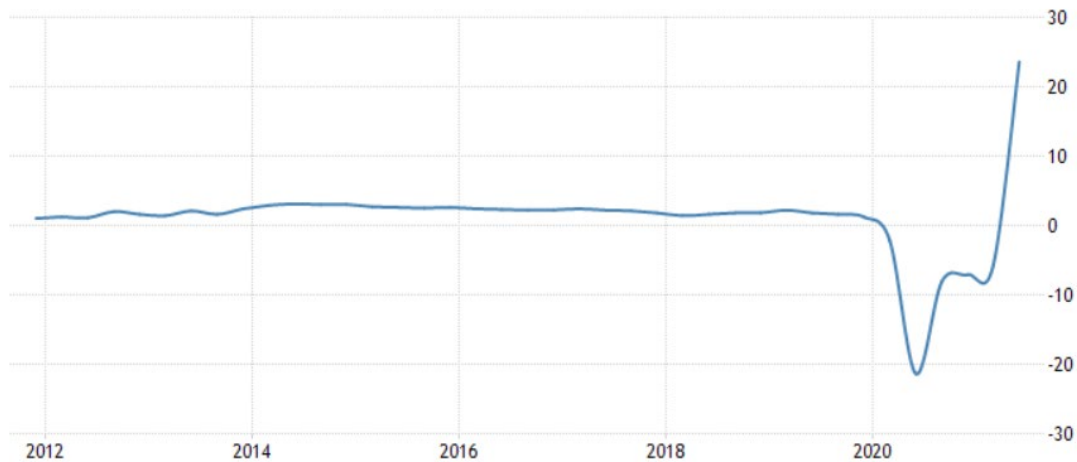
- 4.9 The UK economy has experienced a significant shock over the past 18 months as a result of the Covid-19 pandemic. Following the emergence of the virus at the beginning of 2020, the subsequent restrictions on movement and behaviour through a series of national lockdowns have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Household spending fell by over 20% for the second quarter of 2020 following the imposition of national lockdown measures, which commenced in March 2020, including the forced closure of non-essential retail, employees being asked to work from

⁶ 'Retail Planner Briefing Note 15', Experian, December 2017

their homes wherever possible, and millions of jobs being furloughed. The resulting fall in expenditure was the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 (18.1%) as all but essential stores closed during the height of the lockdown.

- 4.10 However, because of the gradual reopening of businesses over the summer of 2020, the economy returned to growth and gathered momentum as a greater number of sectors reopened, including hospitality and leisure services, followed by the full reopening of schools. However, a more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021, and this had further implications for the economy.
- 4.11 In October 2020, Experian published its Retail Planner Briefing Note 18⁷ ('ERPBN18'), which provides Experian's most recent information on retail developments and short, medium and long term forecasts for retail planning decisions.
- 4.12 ERPBN18 (December 2020) sets out Experian's best estimate of the retail sector and future changes in expenditure at the time of its publication. Experian anticipates that the post-Covid-19 recovery will be subdued and that the economy will not recover to pre-Covid levels until after 2022, depending on international economic events that could result in a wider recession. In this regard, Experian consider that due to the unprecedented nature of the global pandemic, there is great uncertainty over the scale and duration of the outbreak and the resulting economic consequences. An orderly transition and adjustment to a new trading relationship resulting from Brexit is also assumed, and any uncertainty arising from this is likely to further weigh on the economy.
- 4.13 Although the medium term outlook for Gross Domestic Product (GDP) will be shaped by the course of the pandemic, the long-term outlook for GDP remains unchanged, with growth of around 1.7% expected to remain below historic averages (2.3%) due to slower population rises and productivity. The fluctuations in GDP growth over the last 18 months demonstrate the recent volatility. Figure 1 provides a snapshot of GDP growth from 2012 to now, and shows the UK's economy expanded 23.7% year-on-year in the second quarter of 2021, a substantial rebound from the significant decline in GDP growth in 2020.

⁷ Experian, Retail Planner Briefing Note 18, October 2020

Figure 1. UK GDP Annual Growth Rate 2012-2021

Source: Trading Economics, 2021

- 4.14 Experian also provides projections for overall retail sale growth, and while these are expected to be volatile in the near term, growth is less impacted over the medium and longer terms. The outlook for special forms of trading (i.e. internet sales, mail order) has been revised upwards by Experian, while the future growth prospects for retail floorspace have been revised down. This reduction is in line with weaker projections for spending and stronger projections for internet sales.
- 4.15 In terms of inflation, Office for National Statistics (ONS) data⁸ indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 0.6% at December 2020. The rate of inflation in 2021 has then increased back up to 2.4% in June 2021. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. This has of course been pressurised further with the impact of the Covid-19 pandemic, with more people having turned to online options due to lockdown restriction periods.
- 4.16 Notwithstanding the increasing popularity of shopping online, there will always be a need and demand for physical stores. The vast majority of convenience sales are made in store, and even when groceries are purchased online and delivered, the majority of those orders are selected by staff from shelves in physical stores. For comparison goods shopping, the requirement for physical stores is expected to remain as shoppers opt to enjoy the experience of viewing items

⁸ ONS 'Consumer price inflation tables' dataset, May 2021

in person. However, this shopping experience will need to evolve and diversify, seeking to engage shoppers on an in-person basis.

- 4.17 In terms of the grocery market, the ONS⁹ reports that the food and non-alcoholic beverage inflation rate as of May 2021 was -1.3% when compared to 12 months previous. The same figure in May 2020 was 1.9%. Conversely, the inflation rate on alcoholic beverages and tobacco was 1.7% when compared to 12 months previous. The same figure in May 2020 was 2.6%.
- 4.18 The long-term impacts of the Covid-19 pandemic are ultimately, yet to be determined, and as such, it is almost impossible to predict with any meaningful certainty what effects from short-term business closures and significantly reduced levels of economic activity will continue to have.
- 4.19 However, as may be expected, the ONS¹⁰ has reported that retailers who had predominantly relied on customers visiting their stores recorded big reductions in sales after lockdown restrictions were implemented and they were required to close their doors. On the other hand, dispensing chemists have sold consistently more since the pandemic began than they did before, with their sales increasing in March 2020. Sales continued to grow in June 2020 even after restrictions were eased and other non-essential stores were allowed to reopen. Non-specialised foodstores, including supermarkets, also traded consistently above their pre-pandemic levels. Furniture retailers returned to pre-pandemic levels swiftly following the lifting of restrictions in the summer of 2020 and have continued to grow beyond pre-pandemic levels, boosted by people still spending more time at home than they used to.
- 4.20 In terms of online retailing, the ONS¹¹ has reported that online sales reached higher than usual levels over the course of the pandemic, peaking at first in May 2020 (32.8% of all sales). Although these levels dropped off after shops reopened in June 2020, the proportion of online retailing began to increase in October 2020 and continued to do so the following month, following the reintroduction of lockdown measures, peaking again in January 2021 (37.1% of all sales). However, with the gradual reopening of the economy in Spring/Summer of 2021, the ONS has reported a decrease in the overall proportion of retail spending online to 28.1% in October 2021 where it has largely levelled out, with May 2022 showing online sales as 26.6% of

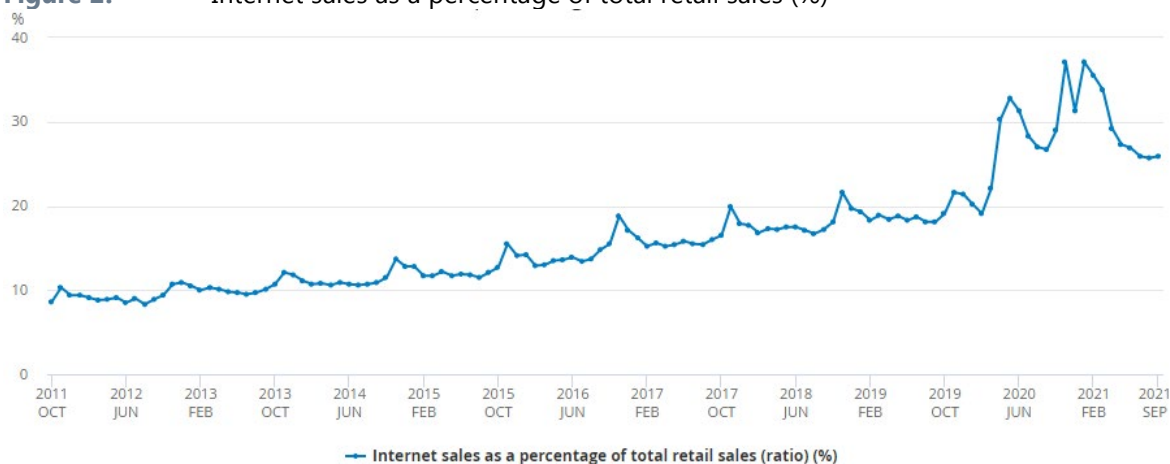
⁹ ONS 'Detailed Figures by Division' dataset, May 2021

¹⁰ ONS analysis titled 'The impact of the coronavirus so far: the industries that struggled or recovered', published on www.ons.gov.uk on 9 December 2020

¹¹ ONS, 'Retail Sales Index time series (DRSI)', October 2021

all sales. Figure 2 graphs the growth of internet sales as a percentage of total retail sales between October 2011 and September 2021.

Figure 2. Internet sales as a percentage of total retail sales (%)



Source: ONS, Retail Sales Index time series (DRSI), October 2021

Available Expenditure and the Impact of the Internet

- 4.21 Experian forecasts have reported fairly turbulent growth in per capita convenience and comparison goods expenditure over the next two years. In this regard, Experian forecasts that per capita expenditure growth in the convenience goods sector will increase substantially to 8.4% at 2020 (from -0.9% at 2019), with this growth largely attributed to consumers spending more on such goods as a result of lockdown measures. However, as shown in Figure 3 (see below), Experian forecasts a 6.2% decrease in per capita expenditure growth in 2021 for convenience goods, with very limited forecast growth thereafter to 2039.
- 4.22 As Figure 3 below indicates, forecast increases in comparison goods spending will increase following a substantial decrease of 8.5% in 2020, but it is evident that per capita comparison goods expenditure increases going forward will be below the level apparent at the turn of the millennium (the average annual growth rate between 1997 and 2007 was 8.5% for comparison goods). Experian identifies that per capita comparison goods expenditure growth dropped from 5.4% at 2017 to 3.4% at 2018, and forecasts that it will remain between 2.9% to 3.0% per annum in the medium to long term. The exception to this is the decrease noted above in 2020, which is largely a result of lockdown measures closing all but essential stores. There was an anticipated growth of 6.5% in per capita expenditure in 2021 and 3.8% in 2022 under the expectation that lockdown measures will be limited and expenditure will pick up, though recent data releases suggest that this may have been optimistic in light of wider global economic events.

Figure 3. Experian's Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2022	2023-27	2028-40
Convenience goods	3.3	1.9	1.0	-0.9	8.4	-6.2	0.2	0.0	0.1
Comparison goods	4.8	5.4	3.4	4.3	-8.5	6.5	3.8	3.0	2.9

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 18

- 4.23 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation for high street stores is exacerbated through the increasing amount of expenditure, which is committed through special forms of trading¹² and, in particular, online trading.
- 4.24 In this regard, Appendix 3 of ERPBN18 indicates that special forms of trading accounted for just under 27% of total retail sales at 2020 as a consequence of Covid-19 and subsequent to very strong growth in online retailing over the past decade. Although the growth in special forms of trading is anticipated to drop back slightly in 2021, Experian believes that special forms of trading will account for almost 30% of retail sales by 2026, increasing to around 32% by 2031.
- 4.25 Figure 4 below sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for over a third of comparison goods expenditure and over a fifth of convenience goods expenditure by 2031.

Figure 4. Experian's Identified and Forecast Market Share of Special Forms of Trading for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2026	2031
Convenience goods	10.0	11.6	12.8	14.1	21.1	18.1	21.2	22.8
Comparison goods	18.5	20.8	22.4	23.4	30.6	29.1	33.7	36.2

Source: Figure 5 of Experian Retail Planner Briefing Note 18

- 4.26 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some physical store retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online, but fulfil orders from regular stores rather than warehouses¹³, with purchases therefore helping to sustain tangible retail floorspace. As a

¹² Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

¹³ This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

Convenience Goods

- 4.27 Even prior to the Covid-19 pandemic, socio-economic conditions had led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel¹⁴ finds that the decline of the food superstore is well established and that this can be attributed to two issues.
- 4.28 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have a need to undertake a 'main food shop'.
- 4.29 Secondly, general uncertainty in the economy, even prior to Covid-19, has made hard discounters (namely Aldi and Lidl) a more attractive proposition, and are particularly thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods and premium products becoming increasingly prevalent. It is clear that the likes of Aldi and Lidl are no longer 'discount retailers' as they once were, and have better met a wider range of customers' needs through the increase in a supply of more premium products.
- 4.30 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.
- 4.31 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Figure 5 below.

¹⁴ 'UK Retail Rankings', Mintel, April 2018

Figure 5. Market Share of convenience goods operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020
Tesco	28.4	28.1	27.8	27.4	27.3
Sainsbury's	16.5	16.5	16.1	16.0	15.9
Asda	15.3	15.3	15.2	14.8	14.3
Morrisons	10.8	10.8	10.6	10.3	10.4
Aldi	6.2	6.8	7.4	7.8	7.4
Co-op	6.3	5.8	5.9	6.1	6.0
Lidl	4.6	5.0	5.3	5.9	6.1
Waitrose	5.1	5.2	5.0	5.0	5.0
Iceland	2.2	2.2	2.2	2.3	2.5
Symbols & Independent ¹⁵	1.8	1.7	1.5	1.6	1.7
Other Outlets	1.7	1.6	1.7	1.6	1.8
Ocado	1.1	1.1	1.2	1.3	1.6

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year. Data for M&S is not provided.

- 4.32 Over the past couple of years, the market has witnessed the closure of unprofitable foodstores, particularly operated by Tesco and Morrisons. Conversely, discount retailers including Aldi and Lidl are planning substantial investment over the coming years, which will likely further shift the grocery market in the short and medium term.

Comparison Goods

- 4.33 The comparison goods sector is currently being squeezed by a number of factors including reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes. The effects of Covid-19 recently and the efforts to contain it, have accelerated those issues.
- 4.34 This 'perfect storm' has resulted in changes to traditional retailing on the UK high street and generally a lesser reliance on comparison goods retail. To underscore this, the Centre for Retail Research reported that 2020 was the worst year for retail job losses in more than 25 years. Around 180,000 retail jobs were lost in total, with this figure representing a rise of almost a quarter on 2019¹⁶.
- 4.35 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focussed on failing retailers and store closures. Marks & Spencer announced in 2016 that they would be

¹⁵ Symbols includes convenience outlets such as Nisa, Spar, Londis and Centra.

¹⁶ Article headlined 'Retail sales in 2020 'worst for 25 years'', BBC, 12 January 2021

closing 110 stores by 2022. A high profile retailer named the Arcadia Group, who owned Topshop, Topman and Dorothy Perkins, announced the closure of around 500 stores in February 2021¹⁷. Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors¹⁸. These announcements are the most recent in a raft of notable closures including Debenhams, which announced the closure of all 124 stores in December 2020¹⁹, and House of Fraser's widely publicised battle to retain as many stores as possible.

- 4.36 Whilst the loss of some of the above retailers from High Streets will have significant repercussions for certain towns (particularly those that lose a Debenhams, Marks & Spencer and/or House of Fraser from their high street), this is partly due to these well-known retailers having failed to 'move with the times' and update their offer, accommodation and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).
- 4.37 As a result of the Covid-19 pandemic, many offices/workplaces were closed during the various lockdowns that took place in 2020 and 2021 and many workers therefore worked from home for significant periods during this time. It will be interesting to see whether any permanent change in working from home may act to counterbalance the polarisation trend, given the prospect of fewer commuters in larger centres and greater numbers of people spending the working day in and around their home, and the associated increase in spending across these smaller local centres.
- 4.38 On average, British shoppers spent an extra 63% at local specialist stores such as butchers, bakeries and greengrocers in February 2021 compared to February 2020²⁰. Prevailing market sentiment is that the willingness to support local businesses in small towns will continue post-Covid-19²¹. This could have a significant positive impact on Wealden's town and local centres post-lockdown as demand for locally sourced goods and services could remain higher than pre-Covid-19 levels.
- 4.39 The impact on larger centres may be a reduced footfall, particularly within the week days, and result in the shift in expenditure being directed to the smaller town, district and local centres.

¹⁷ Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021

¹⁸ Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020

¹⁹ Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020

²⁰ Speciality Food Magazine, 2021. *Why the local shopping boom will continue post-COVID*.

²¹ Ibid

Whilst this will be a positive for the smaller centres in Wealden, larger centres that rely on commuter spend may suffer as a result.

- 4.40 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M, Home Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld, there is some evidence that this market may be approaching capacity.
- 4.41 It remains to be seen what additional long-term impacts will eventuate from the most recent retail closures that occurred during the Covid-19 pandemic. However, prior to the implementation of lockdown measures, trading conditions for retailers were challenging and many retailers were struggling to meet costs, including rents, resulting in a higher proportion of retailers restructuring or entering administration. As has been seen throughout 2020 and 2021, the conditions have only become more challenging.

Leisure and Food & Drink

- 4.42 The greater availability of high street units for leisure purposes appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent leisure, and food and drink retailers and also modern markets, which are frequently focussed around food and drink operators.
- 4.43 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples such as Wagamama and Giggling Squid, which expanded quickly across the UK. However, there are signs that the market is becoming saturated in some locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result.
- 4.44 Concurrently, the sector at the national level has seen a rise in experience-seeking consumers with diners favouring innovative independent restaurants over larger, chain-style operators. The cultivation of new and inventive dining environments is now considered pivotal in ensuring repeat business and maintaining customer bases.²² This increased diversity of restaurant

²² Legal & General, 2018. *2018 The Future of Leisure*. (p. 25)

operators has led to more competition in the market, which provides some explanation into the difficulties faced by larger operators.

- 4.45 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core, and other 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing and other seemingly niche pursuits.
- 4.46 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.
- 4.47 More generally, the gym market continues to perform well, with the Leisure Database Company identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.
- 4.48 There is a concern that the implications of the pandemic will be particularly felt on the leisure sector in the longer term. The full impact on the leisure sector as a whole will really evolve throughout the remainder of 2022, and it is clear that the industry is not 'in the clear' yet.

Summary

- 4.49 This chapter has provided an overview of the recent and current retail and leisure trends that form the backdrop for retail, leisure and town centre activity at the current time at the national level. There is no denying that town centres are still feeling the impacts of the Covid-19 pandemic.
- 4.50 Consumer expectations are also continuing to evolve, producing a dynamic retail market. Providers operating in the market are required to evolve as a result of numerous factors, and the diverse nature of consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience, and

notwithstanding the increasing popularity of shopping online, there will always be a need and demand for physical stores. The vast majority of convenience sales are made in store, and even when groceries are purchased online and delivered, the majority of orders are selected by staff from shelves in physical stores.

- 4.51 Leisure uses have seen a resurgence in town centres in recent years with a greater focus on independent leisure, and food and drink retailers, and also modern markets, which are frequently focussed around food and drink operators. Cinemas and other ‘competitive socialising’ concepts have also been seen to be successful. The gym market is also continuing to do well. However, the full impact of the Covid-19 pandemic and the changes to town centres and shopping habits is yet to fully be understood—especially in the context of wider economic struggles that may further delay recovery—and town centre retailers, businesses and stakeholders will need to continue to be resilient to find success.

5 National & Regional Property Market Analysis

- 5.1 This chapter provides a national overview of the different commercial and residential property sectors and how they have adapted and performed in recent years. Continuing on from the commentary provided in Chapter 4, we identify how this commercial activity measures against nationally observed trends across the relevant market sectors as well as providing an analysis of the regional Wealden context.

Commercial Sector – National Context

- 5.2 The national commercial market is currently in a period of decline. Gross Domestic Product (GDP) fell by 0.3% in April 2022, following a decline of 0.1% in March 2022. Manufacturing, services and production have all shrunk since January 2021²³.
- 5.3 After the strong rebound for the UK economy in 2021, supply chain problems and elevated geo-political risks appear to be having a detrimental effect on commercial growth. The Bank of England raising interest rates in June 2022 will inevitably slow economic growth. As of Q1 2022, the economy was 0.7% above its pre-Covid level²⁴.
- 5.4 Manufacturing activity has slowed to its lowest rate since January 2021. The latest UK Services Purchasing Manager's Index (PMI) has also fallen to its lowest level since February 2021. On a slightly positive note, those in the leisure, travel and events industries noted that post-pandemic demand is leading to strong recovery in these sectors²⁵.
- 5.5 Recent increases in the price of oil and gas, as well as many other commodities, are compounding challenges facing consumers, who are already dealing with the knock-on effects of increases in National Insurance contributions and rising interest rates. Given the inflationary shock, historically low levels of consumer confidence, ongoing supply chain disruptions, and slower global growth, forecasts for UK growth in 2022 are being revised downwards²⁶.

²³ Carter Jones, June 2022. 'Commercial Market Outlook – June 2022'.

²⁴ Avison Young, June 2022 'Commercial Real Estate Market Review – June 2022'.

²⁵ Carter Jones, June 2022. 'Commercial Market Outlook – June 2022'.

²⁶ *Ibid*

- 5.6 The UK employment rate decreased very slightly in the three months to April 2022, to 75.6% from 75.7% the previous month, still lower than pre-pandemic. The unemployment figure meanwhile increased to 3.8% over the period, again up slightly from last month's 50-year low²⁷.
- 5.7 Inflation is now a primary concern for the commercial sector. UK consumer price inflation reached 9.0% in the 12 months to April 2022. This is the highest rate in over 40 years. The primary factor is the recent spike in energy prices, The recent depreciation of the Sterling against other major currencies has further increased the cost of imported goods²⁸.

Commercial Sector – Wealden Context

- 5.8 Wealden's commercial property market varies distinctly across the district. North Wealden's commercial property market has been quoted by Locate East Sussex as being a 'separate commercial property market entity from the south of the district'²⁹ due to the split of workforce and values across the district. Prominent locations such as Uckfield in the centre of the district are seen as a good staging post by developers and occupiers between coastal locations like Eastbourne and significant trading locations like Gatwick and Crawley. One market report noted the reluctance of employees in Uckfield to drive south for new employment, noting that the commercial hubs to the north offer more floorspace options and business opportunities. Conversely, locations in the south of Wealden like Polegate and Hailsham, which are typically more industrial (B2/B8) locations than Uckfield, are seen as interchangeable with Eastbourne due to their proximity³⁰. This results in a demand for floorspace from business occupiers in Eastbourne looking for more commercial floorspace in close proximity to Eastbourne at affordable rates.
- 5.9 A significant portion of Wealden's economic activity comes from industrial estates. There are larger-scale storage/manufacturing facilities typically located on the outskirts of existing market towns. There are currently concerns that the district's industrial estates need investment to ensure that they remain 'fit for purpose'³¹. These industrial park locations tend to generate a significant portion of the economic activity in the major towns in Wealden. The industrial market has held up well post-Brexit and demand has remained steady in Wealden and throughout East Sussex.

²⁷ *Ibid*

²⁸ *Ibid*

²⁹ Locate East Sussex, May 2020. *Land and Premises Supply – Market Assessment*.

³⁰ *Ibid*

³¹ *Ibid*

- 5.10 The UK's referendum and subsequent decision to leave the EU led to a national standstill in terms of new investment. This trend was observed to an extent in Wealden, however demand in the district has remained strong and the slowdown in demand and investment for commercial floorspace has been characterised as a 'blip'³² rather than a significant downturn.
- 5.11 One of the biggest issues that has been identified in Wealden and within the wider East Sussex market is deliverability. There has been a historic supply-side problem where insufficient value generated by business class uses (formerly use classes A & B) has resulted in a failure of the market mechanism to bring forward sites for commercial floorspace development. The lack of financial incentive for national developers to develop sites in Wealden has resulted in a lack of supply of employment floorspace. There has also been a lack of prime sites in suitable strategic locations, which has contributed to the lack of delivered supply in Wealden. One national developer is quoted as saying 'East Sussex's profile as a business location is clearly not high enough to be on their radar'³³.

Retail

National Retail Market Overview

- 5.12 As described in Chapter 4, the UK retail market was experiencing significant structural change prior to the coronavirus outbreak in early 2020. This was primarily caused by the increase in online shopping and e-commerce, as well as a concurrent decrease of footfall in retail locations (i.e. town centres, shopping centres, retail parks). The effects were of particular significance to the high street, where the sector struggled to maintain performance as consumer confidence fell.
- 5.13 As a result of the subdued performance throughout the pandemic, many comparison / non-essential retailers have been unable to meet rent and service charge obligations. CBRE reported that retail rent collection was at 43% nationally in late June 2020 – a decrease of 25% against the same period in 2019. Landlords with tight covenants and limited liquidity struggled to facilitate debt repayment which resulted in a default increase in the availability of stock. While the Coronavirus Act 2020 provided a moratorium on commercial lease forfeiture for non-payment of rent, it is reported that two-thirds of retailers nationally face legal action once the rent moratorium ends in July 2021, over an estimated £2.9 billion of unpaid rent³⁴.

³² Ibid

³³ Locate East Sussex, May 2020. *Land and Premises Supply – Market Assessment*.

³⁴ Retail Gazette, 2021. *2/3rd of retailers face legal action in July over £2.9bn unpaid rent*.

- 5.14 As a result of the continued uncertainty, landlords' portfolios have seen a reduction in average lease lengths with a threefold increase in leases less than 2-years between 2018 and 2020. Savills estimated that leases over 5-years would amount to just 25% of overall take-up in 2020 – a decrease of 45% from 2016 – demonstrating the desire for occupiers to agree more flexible terms in uncertain times.³⁵
- 5.15 Conversely, convenience retail has performed well in recent months and remains buoyant against fading interest in comparison operators. As such, it is anticipated that essential retail investments with long leases on FRI (Full Repair & Insuring) terms and RPI (Retail Price Index) increases could prove more resilient in town centre / high street locations. National occupiers such as Co-op and One Stop are actively looking for new sites, whilst ALDI and Lidl continue their expansion across the country³⁶.

Wealden's Retail Market Overview

- 5.16 Prior to the Covid-19 pandemic, retail on high streets in smaller towns struggled as an increasing share of retail revenue moved online³⁷. However, when the Covid-19 pandemic related lockdowns forced non-essential shops to close, this had a harsher impact on more established major retail hubs such as Royal Tunbridge Wells and Eastbourne, where large-scale shopping centres are designed to provide an all-round shopping experience. These hubs were forced to close which meant retail revenue in these areas decreased significantly. Meanwhile, small-town high streets that make up Wealden's high-order town centres benefitted in some ways from these lockdowns. Towns such as Polegate and Hailsham, where the majority of retail offering is focused on servicing local needs, suddenly became extremely viable options for shoppers. Consumer habits shifted and a new locally-focused approach to shopping emerged during the pandemic.
- 5.17 One issue that has significantly impacted the retail offering in Wealden is the impact that e-commerce has had on retail parks. The aggressive expansion of online companies like Amazon has significantly increased the portion of overall shopping that is undertaken online. Demand for industrial floorspace is now so high that due to a lack of adequate supply, occupiers of retail parks have had to 'make do with space that is available' and repackage space in retail parks into warehousing space³⁸.

³⁵ Savills, 2020. *What impact has Covid-19 had on retail & leisure lease structures in the UK market?*

³⁶ SMC Chartered Surveyors, 2020. *How will Coronavirus impact the Commercial Property Market?*

³⁷ National Law Review, 2021. *E-Commerce's Impact on Small Business in the Age of COVID.*

³⁸ Locate East Sussex, May 2020. *Land and Premises Supply – Market Assessment.*

Office (Sub 5,000 sq ft)

National Office Market Overview

- 5.18 Like most other commercial sectors, the UK office market experienced a turbulent 2020. As office demand is intrinsically linked to employment growth, it is not expected that 2022 office activity will return to typical levels seen prior to the Covid-19 pandemic. Office take-up across the nine largest cities outside London in Q1 2021 was down 41% on the 10-year average³⁹. In the longer-term, it is not expected that homeworking will continue to be as dominant as it was through 2021. Major companies like Goldman Sachs have already rejected the idea that work-from-home will replace in-person office attendance⁴⁰, although the majority of major companies are instead employing a hybrid model. This will include a mix of office and homeworking and is likely to become more prevalent as companies reconsider space requirements and optimise expenditure through operational adjustments.⁴¹
- 5.19 Before the Covid-19 pandemic, national demand for office floorspace was being driven by flexible workspace providers who increased their take-up by 25% in 2018; a similar rate to the preceding year. This sector is expected to continue to grow, with flexible space predicted to account for 8.5% of total office stock by 2023⁴². Pre-pandemic, market commentators reported a noticeable increase in requirements for fitted office space as occupiers looked to avoid initial capital expenses on fitting out spaces when entering new leases.⁴³
- 5.20 As such, landlords and tenants will be encouraged to work together, taking a more flexible approach to lease starts and commencement dates. Some tenants are also protecting interests by extending current leases on a flexible and short-term basis. JLL expects that four key factors will have a major role in shaping the future of office demand in both the short and longer-term:
- **Remote working** – lifestyle flexibility vs. appropriateness of working environment at home.
 - **Office design** – suitable occupational densities and safe workspaces.

³⁹ North West Place, 2021. *Regional office market continue to toil on COVID*.

⁴⁰ BBC, 2021. *Goldman Sachs boss rejects work from home as the 'new normal'*

⁴¹ Ibid.

⁴² JLL, 2019. *Disruption or Distraction, Flex Space*.

⁴³ Colliers International, 2020. *South East Offices*.

- **Technology** – smart office buildings, which support companies' social and wellness initiatives.
- **Commuting patterns** – current concerns with public transport due to the Covid-19 pandemic are preventing office re-entry for many⁴⁴. This factor has proved less important in recent months as wider commuting patterns have shifted towards flexible working weeks with some days spent in the office and some at home.

Wealden Office Market Overview

- 5.21 Wealden is located within a commutable distance of significant office hubs on the outskirts of its administrative area. The surrounding major towns/cities of Crawley, Royal Tunbridge Wells, Eastbourne and Brighton all provide more established and better-connected strategic locations for large-scale office occupation than the towns of Wealden. This has resulted in the majority of large office occupiers in Wealden being local, public sector bodies.
- 5.22 Commercial agents have also noted a shortfall in demand for office space from private sector start-up businesses. These types of businesses have previously accounted for a significant portion of office floorspace take-up in the district in the absence of large-scale private sector occupiers. Historically, smaller start-up companies would occupy smaller office floorspace above retail units. However, many of these smaller office spaces have been converted to residential flats in recent years under new permitted development rights. The office stock available in Wealden was previously described as being of 'indifferent quality' and agents agreed that this stock was not worth keeping⁴⁵. The smaller businesses that would previously have occupied this office stock are now being run from home and the level of floorspace take-up from this sector has subsequently decreased.
- 5.23 In general, the majority of commercial floorspace take up in Wealden over the past 6 years has been dominated by industrial warehousing (Use Class B8)⁴⁶. The regional office market has faded, with less occupiers taking on office space under traditional leases. Changing work practices have meant a shift in Wealden towards more flexible office arrangements with occupiers favouring smaller suites inside larger, high quality properties. The Covid-19 pandemic and subsequent work-from-home guidelines have accelerated this trend and the long-term effects of the pandemic on demand for flexible office workspace remains to be seen. There is

⁴⁴ JLL, 2020. *The future of global office demand*.

⁴⁵ Locate East Sussex, May 2020. *Land and Premises Supply – Market Assessment*.

⁴⁶ Ibid

now also co-working space available in North Wealden where demand was high pre-pandemic and it is anticipated that the aforementioned changing workspace practices are likely to increase demand for these types of facilities. There has been an increase in the number of incubation facilities in nearby locations like Eastbourne where micro-businesses can be accommodated and demand for these facilities may soon extend into the south of Wealden⁴⁷.

Food and Beverage

National Food & Beverage (F&B) Market Overview

- 5.24 In a similar trend to retail, the F&B sector nationally has experienced difficulties over the past few years with several high-profile Company Voluntary Arrangements (CVAs) and closures. PWC reported that there were 7 CVAs for 'large companies' across the retail, consumer, hospitality and leisure (RCHL) sector in 2019 whereas there were 19 from January to November 2020⁴⁸. They also speculate that the number of CVAs in the RCHL sector in 2020 would have been higher were it not for government interventions, such as the furlough scheme.
- 5.25 Market conditions have become increasingly challenging throughout the Brexit and Covid-19 issues. The uncertainty for both consumers and investors has led to decreased demand for F&B premises, alongside further considerations of increased import costs, rises in the Living Wage and reliance on EU workforces. These factors may potentially lead to a slowing in acquisitions and are expected to be felt most strongly in secondary markets⁴⁹.
- 5.26 As a result, some operators are moving towards smaller spaces to minimise their capital expenditure, rent and rates liabilities, and backing up sales through takeaway and delivery supported by companies such as Deliveroo and Uber Eats⁵⁰. In addition, market commentators suggest there may be opportunities for innovative operators who can secure sites on favourable terms from landlords looking to occupiers. Whilst these alternative income streams may provide solutions for both occupiers and landlords, flexible arrangements offer little security or stability over the longer term⁵¹,

⁴⁷ Locate East Sussex, May 2020. *Land and Premises Supply – Market Assessment*.

⁴⁸ PWC, 2020. *CVAs: 2020 and beyond*.

⁴⁹ Savills, 2017. *UK Commercial Leisure: Q1 2017*.

⁵⁰ Property Week, 2019. *Fluid opportunities on the horizon for casual dining in 2019*.

⁵¹ Property Week, 2020. *Coronavirus adds to restaurant industry's woes*.

Wealden Food & Beverage (F&B) Market Overview

- 5.27 Wealden's previous Town Centre Retail Study in 2016 concluded that whilst there was some F&B offering across the higher order town centres, a significant proportion of this offering was made up of takeaway shops and there was a lack of high-quality F&B establishments. The recommendations included trying to attract more branded F&B outlets to town centres⁵².
- 5.28 Providing higher quality daytime F&B offering, alongside other leisure provisions such as cinemas, can encourage subsequent investment into evening economy provisions. A large-scale anchor leisure facility was identified as a potential kick-starter to the evening economy investment, however such a facility has yet to materialise in any of Wealden's higher order town centres.

Cinema & Theatre

National Cinema & Theatre Market Overview

- 5.29 The cinema market is highly concentrated, with the top three multiplex operators accounting for 68.5% of schemes in the UK (Vue, ODEON & Cineworld). Such operators have typically favoured out-of-town locations where larger units and cheaper rents have meant that cinemas can act as anchor tenants for larger leisure complexes. Further, with typical floorspace requirements of 30,000 – 45,000 sq ft, the contracted rent obligations for cinema operators are significant, making both the spatial and financial prospects of most town centre sites unfeasible⁵³.
- 5.30 However, as the commercial leisure market continues to be driven by the prioritisation of consumer experience, there has been a concurrent rise in smaller, boutique cinema operators such as Everyman, Curzon and Picturehouse. By contrast, these schemes can operate on significantly smaller floorplates (some as small as c. 8,000 sq ft) and the prospect of occupying town centre locations therefore becomes spatially and financially feasible⁵⁴.
- 5.31 The market for theatres and performing arts venues is considerably more unknown, with information notably scarcer when compared to conventional leisure facilities. As a result, the limited availability and quality of transactional evidence make for a restricted insight into how the sector operates and the typical requirements sought by operators. However, town centre

⁵² Carter Jonas, 2016. *Wealden Town Centre and Retail Study*.

⁵³ Legal & General, 2018. *The Future of Leisure*.

⁵⁴ Ibid.

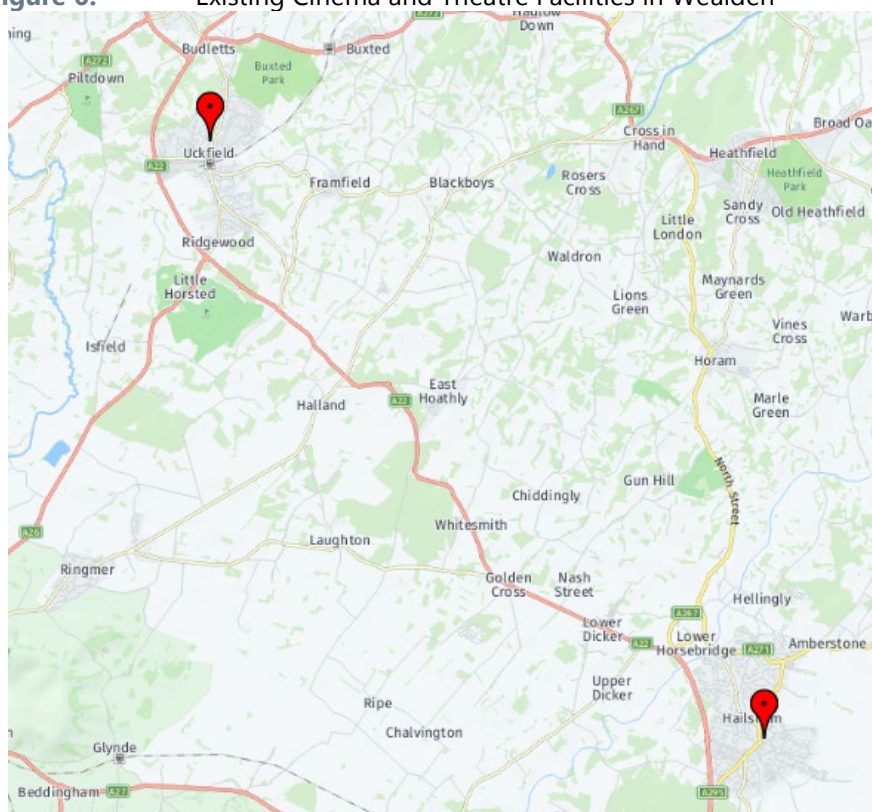
locations are usually favoured, with size requirements in suburban centres influenced by the catchment population.

- 5.32 The emergence of both uses in town centres has meant that leisure concepts are becoming increasingly common anchor tenants for retail districts and commercial promenades. This encourages consumers to combine activities in a single town centre trip (e.g. eating out before a cinema / theatre booking, food shopping after a workout/fitness class), leading to increased footfall, consumer spend and longer dwell times.⁵⁵

Wealden Cinema & Theatre Market Overview

- 5.33 There are currently two operational cinema and theatre facilities in Wealden; the Hailsham Pavilion and The Picture House, Uckfield. The location of these two facilities is provided in Figure 6 below.

Figure 6. Existing Cinema and Theatre Facilities in Wealden



Source: Doogal Geocode, 2021.

- 5.34 Hailsham Pavilion is the smaller of the two facilities. This 203-seat cinema was erected in 1921 but closed its doors in 1965. It was re-opened as a bingo hall between 1967-1987, after which it

⁵⁵ Ibid.

lay vacant until community funding led to its refurbishment and re-opening as a cinema in 2000.

- 5.35 The second existing cinema facility is The Picture House, Uckfield (not to be confused with boutique cinema operator Picturehouse). This cinema was originally constructed in 1916 and has a capacity of 236 seats. It also includes a restaurant as part of the existing facilities. In April 2021, it was announced that both of these facilities would receive investment funding as part of the second round of the Culture Recovery Fund⁵⁶.
- 5.36 Recent investment in the Hailsham Pavilion has positively impacted the town's evening economy; however, the qualitative potential for a larger and more modern facility was raised in the previous Wealden Town Centre Retail Study 2016 as a way to attract name-brand restaurants and evening drinking establishments. We go on to test the population spending capacity for additional facilities later in the study (see Chapter 7).

Health & Fitness

National Health & Fitness Market Overview

- 5.37 Demand for health and fitness operations in the UK has increased significantly over the past decade, with a number of gym chains expanding across the country to service emerging fitness concepts. This trend of expansion has also been shared with smaller, boutique operators who offer specific services or types of training in more urban locations. Units of this nature can be a quarter to a tenth of the size of typical gym footprints, with premises of c. 2,000 sq ft appearing in High Street locations. This again supports the underlying prioritisation of experience in the commercial leisure sector, as consumers seek new and innovative lifestyle concepts, which are convenient and accessible.

Wealden Health & Fitness Market Overview

- 5.38 All of the high order town centres in Wealden benefit from a leisure centre apart from Polegate. The previous Wealden Town Centre Retail Study 2016 reported that the leisure centres in these town centres provide significant appeal to the public and draw footfall to these locations. Crowborough, Uckfield and Hailsham have leisure centres that are generally located in or near the town centre. Heathfield Leisure Centre is less centrally located and therefore does not attract footfall into the town centre.

⁵⁶ In Your Area, 2021. *Wealden MP welcomes funding for arts and entertainment.*

- 5.39 The emerging Hailsham Aspires Masterplan has recently completed public consultation in 2021 and the Council are currently reviewing different options for the layout of the area. Amongst the proposals is the replacement of the existing leisure centre with a more modern facility. The provision of a more modern facility could assist in attracting more people to Hailsham Town centre.

Residential Market Analysis

National Context

- 5.40 Since the Global Financial Crisis, the national housing market has generally been in a period of growth. Demand has been driven by owner-occupiers and investors but has led to a market imbalance with demand significantly outstripping supply. The supply constraints have led to average house prices rising at significant rates. Figure 7 shows the average prices for all residential property types (new-build and re-sales) in England since January 2007.

Figure 7. England's Average All Residential Property Types Price



Source: Land Registry, 2021.

- 5.41 England has seen an average house price rise of 68% since March 2009. Values rapidly increased across the country between 2013–2018; however, after this period, the rate of growth has slowed. This is likely due to the political and economic uncertainty at the time surrounding the UK's Brexit referendum and the subsequent decision to leave the EU. The uncertainty

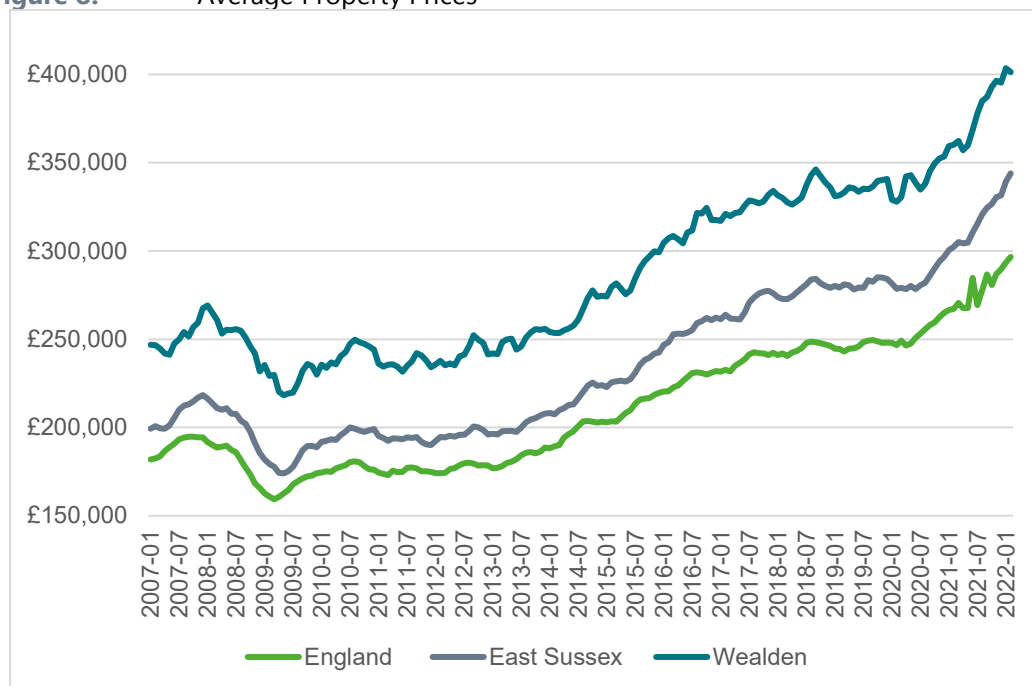
resulting from this vote caused demand for housing in England to fall, hence the decreased rate of price growth. Despite this, values still increased between 2017 and 2020.

- 5.42 Notably, values have improved significantly since mid-2020. This increase in values could be attributed to the Stamp Duty Holiday, which has bolstered housing market activity during a time of economic uncertainty. Potential future buyers accelerated their decision to purchase property in order to make use of this tax relief, which led to a significant increase in demand. This could explain the sharp average price rise seen in Figure 7 after June 2020.

Wealden Residential Market Overview

- 5.43 Figure 8 shows the average prices for all residential property types (new-build and re-sales) in England, East Sussex and Wealden. Since the lowest point in the market in July 2009, Wealden has seen average prices rise by 43%. However, in recent years, the market in East Sussex and Wealden has slowed. Values in Wealden and East Sussex are only marginally higher than they were at their peak in 2017 and early 2018.

Figure 8. Average Property Prices



Source: Land Registry, 2021.

- 5.44 Values in Wealden have been consistently higher than the East Sussex and national average since 2007. They have all typically followed a similar trend. As of February 2022, the average price of £401,331 (new-build and resale) for all accommodation in Wealden is 17% higher than the average in East Sussex (£343,929). Average prices in Wealden are also 35% higher than the

national average (£296,612). Notably, values in all locations have improved since mid-2020. This increase in values could be attributed to the Stamp Duty Holiday, which has bolstered market activity during a time of economic uncertainty.

- 5.45 As displayed in Figure 8, prices in Wealden have increased significantly since the lowest point in the market in 2009. However, average sales data for the district masks a disparity across residential sub-markets in the district. The Local Housing Needs Assessment (LHNA) 2021 identifies that northern submarket, that includes Crowborough and Wadhurst consistently achieves significantly higher property values than southern submarkets that includes Hailsham and Polegate. A value heatmap of Wealden is provided in Figure 9 to demonstrate this disparity.

Figure 9. Wealden Property Value Heatmap



Source: Prime Location, 2021.

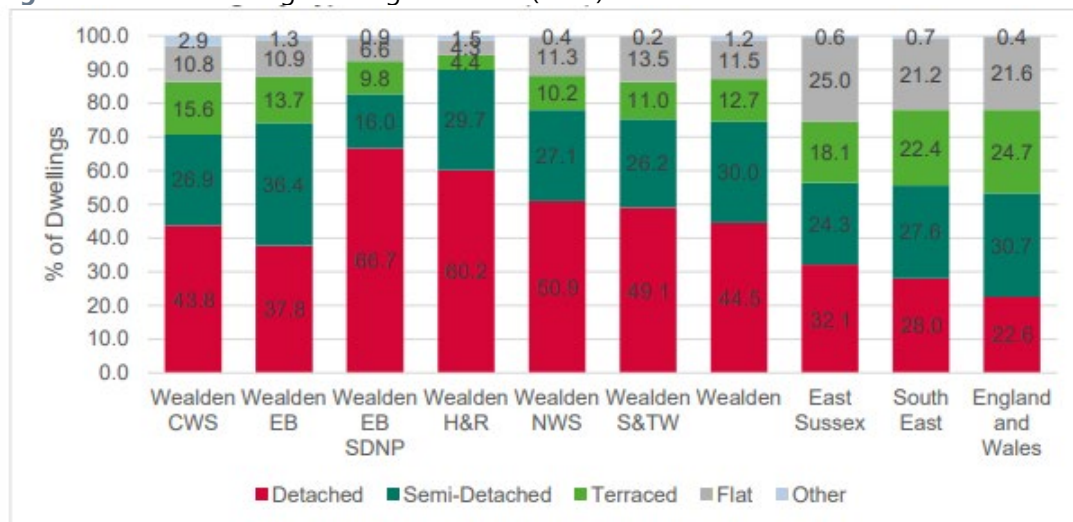
- 5.46 Red colouring in Figure 9 indicates that an area is of higher value. Green indicates medium-level value and blue indicates lower-value area. In 2016, there was a £241,239 price differential between the highest sub-market value of Mayfield (£454,795) in the north of Wealden, when compared with lowest value sub-market of Hailsham (£213,556) in the south. The LHNA 2021 suggests that the reason for this disparity could be that the north of the district is better connected to nearby employment markets such as Crawley, Gatwick and Tunbridge Wells. The north is also nearer to the Gatwick Diamond and in close proximity to London. There are also no rail links from the south of the district that go directly to the north which results in lengthy

journey times. The north therefore presents a more viable option for commuters looking to move out of London and commute in for work, hence the increased demand for properties in the north and higher achieved values.

5.47 The LHNA 2021 also indicates that there is a difference in stock size between the north and south of Wealden. The assessment states that there is a greater concentration of larger housing stock in the north of the district, whilst the south is characterised by smaller homes. The 2011 census indicates that there is a greater elderly population in the south of the district, which could mean an increase in demand for smaller properties amongst the elderly-downsizer demographic. The size of housing stock across the district may also contribute to the price disparity displayed in Figure 9, as larger properties would generally be expected to achieve a higher value at sale.

5.48 Between the 2001 and 2011 Census, Wealden saw a 7.6% stock increase of dwellings (4,585)⁵⁷. During this period, there was an average annual delivery rate of 628 dwellings between 2008–2013. Figure 10 shows the property type mix of stock in 2011 according to the LHNA 2021.

Figure 10. Existing Housing Stock Mix (2016)



Source: LHNA, 2021.

5.49 In 2011, 44.5% of dwellings in the district were detached, 30.0% semi-detached, 12.7% terraced and 11.5% flats. The percentage of detached dwellings in Wealden was significantly higher than across East Sussex (32.1%), the South East (28.0%) and England and Wales (22.6%). Similarly, the percentage of semi-detached dwellings in Wealden (30.0%) was also higher than across East

⁵⁷ ONS, 2011. *2011 Census*.

Sussex (24.3%) and the South East (27.6%), but similar to the percentage across England and Wales (30.7%). Conversely, the percentage of terraced dwellings in Wealden (12.7%) was significantly lower than across East Sussex (18.1%), the South East (22.4%) and England and Wales (24.7%). Similarly, the percentage of flats in Wealden (11.5%) was significantly lower than across East Sussex (25.0%), the South East (21.2%) and England and Wales (21.6%).

Summary

5.50 This chapter has provided an overview of the national picture for both the commercial and residential property sectors and how they have adapted and performed in recent years. We have also provided analysis on the state of these property markets at the regional level, and have considered the challenges that face the town centres within Wealden District. A summary of the key takeaways is provided below:

Retail

- The UK retail market has experienced significant structural changes due to the coronavirus outbreak and the increase in online shopping and e-commerce, as well as a concurrent decrease of footfall in retail locations (i.e. town centres, shopping centres, retail parks). As a result of the subdued performance throughout the pandemic, many comparison / non-essential retailers have been unable to meet rent and service charge obligations.
- As a result of the continued uncertainty in the retail market, landlords' portfolios have seen a reduction in average lease lengths with a threefold increase in leases less than 2-years between 2018 and 2020. Conversely, convenience retail has performed well in recent months and remains buoyant against fading interest in comparison operators.
- The lockdowns associated with the Covid-19 pandemic had a harsher impact on major retail hubs such as Royal Tunbridge Wells and Eastbourne, where large-scale shopping centres are designed to provide an all-round shopping experience. Meanwhile, small-town high streets such as Polegate and Hailsham, where the majority of retail offering is focused on servicing local needs, suddenly became extremely viable options for shoppers. Consumer habits shifted and a new locally-focused approach to shopping emerged during the pandemic. The long-term effects of the pandemic on consumer habits remain to be seen.

- Wealden has also been impacted by the effect that e-commerce has had on retail parks. The aggressive expansion of online companies like Amazon has significantly increased online shopping and the increased demand for industrial logistics space has led to retail parks in Wealden being redeveloped into industrial warehousing floorspace.

Office

- The UK office market experienced a turbulent 2020. Office take-up across the nine largest cities outside London in Q1 2021 was down 41% on the 10-year average. Longer-term it is not expected that homeworking will continue to be as dominant as it was through 2021. The majority of companies are instead employing a hybrid model that will include a mix of office and homeworking and is likely to become more prevalent as companies reconsider space requirements and optimise expenditure through operational adjustments⁵⁸.
- Wealden is located within close proximity to a number of significant office hubs. The surrounding locations of Crawley, Royal Tunbridge Wells, Eastbourne and Brighton all provide more established and better-connected strategic locations for large-scale office occupation than the towns within Wealden. This has resulted in the majority of large office occupiers in Wealden being local, public sector bodies.
- The majority of employment floorspace take-up in Wealden over the past 6 years has been dominated by industrial warehousing (Use Class B8). The regional office market has faded, with fewer occupiers taking on space under traditional leases. Changing work practices have meant a shift in Wealden towards more flexible office arrangements with occupiers favouring smaller suites inside larger, high-quality properties. The Covid-19 pandemic and subsequent work-from-home guidelines have accelerated this trend. This has also resulted in the emergence of designated flexible workspace facilities where single desks can be booked on a day-to-day basis.

Food & Beverage (F&B)

- The F&B sector nationally has experienced difficulties over the past few years with several high-profile Company Voluntary Arrangements (CVAs) and closures. Market conditions have become increasingly challenging through the Brexit vote and Covid-19. The uncertainty for both consumers and investors has led to a decreased demand for F&B

⁵⁸ Ibid.

premises. This may potentially lead to a slowing in acquisitions and is expected to be felt most strongly in secondary markets, such as Wealden.

- Providing higher quality daytime F&B offering, alongside other leisure provisions such as cinemas, can encourage subsequent investment into evening economy provisions. In previous retail studies, a large-scale anchor leisure facility was identified as a potential kick-starter to the evening economy investment; however, such a facility has yet to materialise in any of Wealden's high order town centres.

Cinema & Theatre

- The cinema market is highly concentrated, with the top three multiplex operators accounting for 68.5% of all schemes in the UK (Vue, ODEON & Cineworld). Such operators have typically favoured out-of-town locations where larger units and cheaper rents have meant that cinemas can act as anchor tenants for larger leisure complexes.
- As the commercial leisure market continues to be driven by the prioritisation of consumer experience, there has been a concurrent rise in smaller, boutique cinema operators such as Everyman, Curzon and Picturehouse.
- There are currently two operational cinema and theatre facilities in Wealden; the Hailsham Pavilion and The Picture House, Uckfield. Recent investment in the Hailsham Pavilion has positively influenced the town's evening economy; however, the qualitative potential for a larger and more modern facility was raised in the previous Wealden Town Centre Retail Study 2016 as a way to attract name-brand restaurants and evening drinking establishments.

Health & Fitness

- Demand for health and fitness operations in the UK has increased significantly over the past decade, with a number of gym chains expanding across the country. Smaller, boutique operators have also seen expansion, with their required units often being a fraction of the size of typical gym footprints.
- All high order town centres in Wealden benefit from a public leisure centre apart from Polegate. Crowborough, Uckfield and Hailsham have leisure centres that are generally located in or near the town centre. Heathfield Leisure Centre is less centrally located and therefore does not attract footfall into the town centre.

- The emerging Hailsham Aspires Masterplan has recently completed public consultation in 2021. Amongst the proposals is the replacement of the existing leisure centre with a more modern facility. This provides an opportunity for this use to support the town centre.

Residential Market

- Since the Global Financial Crisis, the national housing market has generally been in a period of growth. Demand has been driven by owner-occupiers and investors but has led to a market imbalance with demand significantly outstripping supply. The supply constraints have led to average prices rising at significant rates.
- Since July 2009, Wealden has seen average prices rise by 43%. However, in recent years, the market in East Sussex and Wealden has slowed. Values in Wealden and East Sussex are only marginally higher than they were at their peak in 2017 and early 2018.
- Values in Wealden have been consistently higher than the East Sussex and national average since 2007. Wealden is regarded as a higher-value area in East Sussex.
- Notably, values in all locations have improved since mid-2020. This increase in values could be attributed to the Stamp Duty Holiday, which bolstered market activity during a time of economic uncertainty.
- The LHNA 2021 identifies that northern submarkets in Wealden that includes Crowborough and Wadhurst for example, are consistently achieve significantly higher property values than southern submarkets that includes Hailsham and Polegate.
- The LHNA 2021 also indicates that there is a difference in stock size between the north and south of the district. The assessment states that there is a greater concentration of larger housing stock in the north of the district whilst the south is more characterised by smaller homes. It also shows that detached housing is the most popular property type in Wealden generally.
- There has been a general shift in buyer preference towards larger accommodation sizes⁵⁹. Due to the Covid-19 imposed lockdowns, people have found themselves spending more time at home and have re-evaluated their priorities for housing features. There has been a noticeable increase in demand for properties with gardens and other

⁵⁹ BBC, *How Covid changed where we want to live*, March 2021.

forms of outdoor space. This has had a negative impact on town centre living as housing with gardens does not tend to be readily available. If it is available, it tends to be priced highly as demand for this product is high.

6 Population and Expenditure Patterns

Introduction

- 6.1 This chapter defines the Study Area and describes the Household Survey undertaken to inform this study. It identifies the current population and available convenience and comparison retail expenditure within the Study Area, as well as the key findings on the survey-derived market share analysis for convenience and comparison goods spending at physical retail locations and internet shopping patterns.
- 6.2 This chapter also looks at the existing patterns of participation in various leisure activities (namely indoor health & fitness, cinema, restaurant, pubs/bars/nightclubs, ten-pin bowling, casino, and cultural facilities).

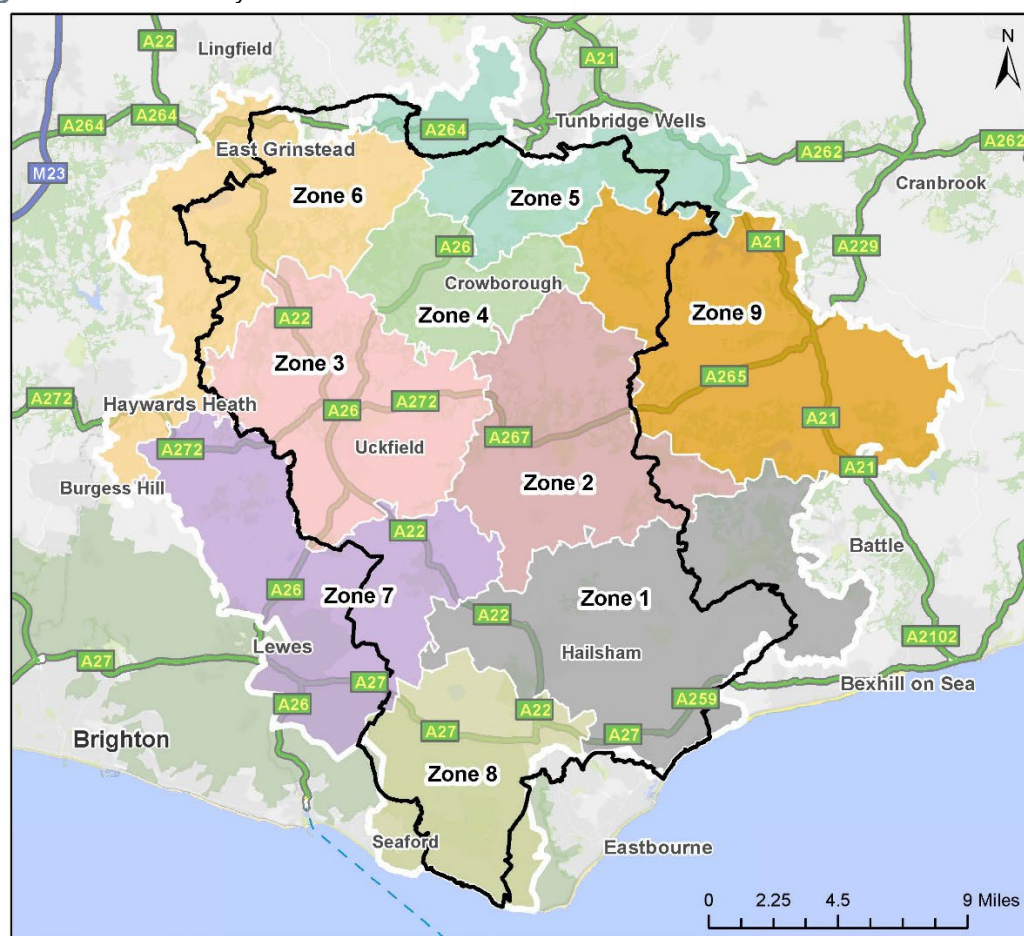
Household Telephone Survey & Study Area

- 6.3 Household Surveys are recognised across the retail industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure.
- 6.4 In carrying out this Study, Nexus has partnered with specialist consultancy NEMS Market Research Ltd (NEMS) in order to identify shopping and leisure patterns, preferences and trends through a comprehensive household telephone survey of residents across the Study Area.
- 6.5 We have gathered empirical evidence through undertaking a household telephone survey of 1,001 respondents in July 2021 in order to provide up-to-date information on local shopping patterns across the Survey Area, including the trade draws of particular town centres, leisure destinations and markets.
- 6.6 This data provides the underlying structure of our quantitative retail capacity modelling, which is used to calculate the capacity for new retail floorspace across the Study Area over the plan period that is discussed in Chapter 7 of this report.
- 6.7 It is important to identify a Study Area that covers the key area of interest. It is common practice for this to be the area within, which you would expect the resident population of the District to carry out the majority of its retail and leisure spending.
- 6.8 This Study Area is shown at Figure 11 below, and in **Appendix A**. The Study Area is defined by postal sector geography in order to allow analysis by sub-areas (or 'Zones') and this allows

NEMS to obtain accurate samples.

- 6.9 The 2016 Wealden Town Centre and Retail Study had previously defined a study area. Having reviewed this study area, we consider that it is still representative of Wealden resident's retail and leisure catchment area. Using the previous study area provides an additional benefit because it enables a direct comparison between this studies' survey results against those obtained in 2016.

Figure 11. Study Area Zonal Plan



Legend

Zone 1	Zone 4	Zone 7	Wealden District
Zone 2	Zone 5	Zone 8	
Zone 3	Zone 6	Zone 9	

N.B. Study Area zonal definitions derived from Wealden Town Centre and Retail Study, 2016

- 6.10 The Study Area comprises 9 Zones across which the 1,001 household telephone survey interviews were undertaken. This is considered a robust representation and is corroborated for

its statistical accuracy, relative to population, by NEMS in their report in **Appendix B**.

6.11 Figure 12 below sets out the postcode sectors, which comprise each Zone.

Figure 12. Study Area Postal Sectors

Zone	Postal Sectors	Household Survey Interviews
1 Hailsham	BN27 2, BN27 3, BN27 4, TN33 9, TN39 5	175
2 Heathfield	TN20 6, TN21 0, TN21 8, TN21 9	100
3 Uckfield	TN22 1, TN22 2, TN22 3, TN22 4, TN22 5	100
4 Crowborough	TN6 1, TN6 2, TN6 3	100
5 Crowborough/Royal Tunbridge Wells	TN3 0, TN3 8, TN3 9	100
6 East Grinstead	RH17 7, RH18 5, RH19 3, RH19 4, TN7 4	125
7 Lewes	BN8 4, BN8 5, BN8 6	100
8 Polegate/Eastbourne	BN20 0, BN25 3, BN25 4, BN26 5, BN26 6	100
9 Edge of Royal Tunbridge Wells	TN5 6, TN5 7, TN19 7, TN32 5	101

Source: Appendix B

6.12 The full questionnaire and results of the survey are presented in **Appendix B**.

6.13 In confirming the wording of the interview questions, we were cognisant of the potential implications on shopping and visiting patterns as a result of changes to habits from the Covid-19 pandemic. Respondents were asked where they 'usually' shop to avoid, as far as possible, the recording of any unusual travel patterns, and a number of additional questions were asked about how people changed their shopping and leisure patterns as a result of Covid-19.

6.14 A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report at **Appendix B**. NEMS quote their work as being within a 95% confidence range.

6.15 An additional In-Centre Survey was also undertaken by NEMS, who conducted 500 interviews across the centres of Hailsham, Uckfield, Crowborough, Polegate and Heathfield in order to establish more qualitative views on the reasons for visiting individual centres.

6.16 Whilst these surveys were self-selecting to a degree, the interview responses were weighted by the demographic of the respondent in order to provide more a more statistically robust dataset. The data is used to inform our health check assessments in Chapter 8 and the in-centre survey questionnaire and results of the survey are presented in full at **Appendix C**.

Study Area Population

- 6.17 Having defined an appropriate Study Area, Nexus has utilised in-house data sourced from the Experian MicroMarketer G3 system (MMG3) to calculate the baseline population data (2019 estimates).
- 6.18 Experian's population dataset utilises the 2011 Census release and the latest mid-year estimates, which are then projected forwards using growth rates derived from ONS population projections and current age and gender estimates. These estimates are accepted as the industry standard basis for long term retail planning.
- 6.19 We have taken a base date of 2021 (the year of the Study), calculating population and retail expenditure forward in 5 year increments to 2026, 2031, 2036 and beyond to 2039 (being the furthest that we can project using Experian MMG3 population trends).
- 6.20 We present the population projections on a Zone-by-Zone basis in Figure 13 below.

Figure 13. Population Projections

Zone	2021	2026	2031	2036	2040	Growth 2021-2039
Zone 1	54,139	56,546	58,735	60,651	61,643	13.9%
Zone 2	21,439	22,498	23,391	24,080	24,525	14.4%
Zone 3	29,293	30,787	32,179	33,488	34,215	16.8%
Zone 4	26,092	27,290	28,325	29,239	29,688	13.8%
Zone 5	12,192	12,603	12,943	13,256	13,425	10.1%
Zone 6	35,387	36,786	37,997	39,089	39,742	12.3%
Zone 7	17,254	18,091	18,810	19,459	19,837	15.0%
Zone 8	27,460	28,289	29,000	29,521	29,679	8.1%
Zone 9	20,246	21,441	22,539	23,572	24,186	19.5%
Total Study Area	243,502	254,331	263,919	272,355	276,940	13.7%

Source: Table 1, Appendix D

Retail Expenditure Forecasts

- 6.21 Retail expenditure data has also been sourced from our in-house Experian MicroMarketer G3 system. We obtain separate data for convenience and comparison goods, which in turn are broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix D**.
- 6.22 Convenience spending is categorised by Experian as everyday food, beverages and perishable items that consumers are unlikely to be willing to travel far to buy. Convenience shopping trips are then divided into two sub-categories, referred to as 'main food shopping' and 'top-up

- shopping', which is more likely to be sourced locally to resident's homes or place of work.
- 6.23 Comparison goods expenditure is divided into eight sub-categories to allow for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.
- 6.24 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 6.25 Expenditure data from Experian is provided per capita in 2019 prices (as is every subsequent monetary value). Using the growth rates presented in Table 6 of the Experian Retail Planner Briefing Note 18 (October 2020), which are reproduced in Figure 14 below, the per capita expenditure is then projected forward to the base year (2021) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).
- 6.26 As identified in Figure 14 below, Experian forecasts suggest that convenience goods expenditure has fallen significantly in 2021. A minor uptick, followed by negligible reductions are now anticipated in the convenience goods sector to 2031, before levelling off with a consistent growth per annum forecast of between 0.0% and 0.1% from 2032 to 2039.
- 6.27 This is largely seen to be as a result of reductions in household spending and shorter term stock shortages as a result of supply chain issues and a response to social distancing measures, as well as a trend towards more price conscious shopping patterns over the long term.
- 6.28 Comparison expenditure is shown to have risen by 8.1% in 2021, responding to pent up demand following extended periods of lockdown in 2020 and 2021, with home-based activities such as DIY and gardening purchases particularly popular.
- 6.29 However, looking ahead, spending growth is expected to level off from 2022 onwards as Experian forecasts a steady growth of between 1.9% and 2.9% per annum to 2039 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect').

Figure 14. 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience growth rates (%)	Comparison growth rates (%)
2016	2.9	3.1
2017	1.4	3.3
2018	0.6	2.0
2019	-1.3	3.4
2020	6.1	-14.5
2021	-5.3	8.1
2022	0.2	2.9
2023	-0.3	2.7
2024	-0.2	2.0
2025	-0.1	1.9
2026	-0.2	2.0
2027	-0.2	2.1
2028	-0.1	2.3
2029	-0.1	2.4
2030	-0.2	2.5
2031	-0.1	2.5
2032	0.0	2.5
2033	0.0	2.6
2034	0.0	2.6
2035	0.1	2.7
2036	0.0	2.7
2037	0.0	2.7
2038	0.1	2.8
2039	0.1	2.7

Source: Figure 6, Experian Retail Planner Briefing Note 18, October 2020

6.30 There are two elements that should be noted here in relation to the forecasts above:

- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect the short-term nature of forecasts and the need to revisit longer-term projections in order to establish the accuracy of economic assumptions.
- Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. As we have mentioned previously, Experian Retail Planner Briefing Note 18 (October 2020) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing

deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales, but source the goods from their own stores' shelves. This is often the case for foodstores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to allow for this aspect of spending to be stripped out.

- 6.31 The growth rates are applied to the expenditure per capita figures, which are then multiplied by the population of each zone at each of the assessment years. Figure 15 below sets out the resultant outcome of the total physical store comparison and convenience expenditure in the Study Area at the base and assessment years.

Figure 15. Retail Expenditure Forecasts in the Study Area (£m)

Zone	2021	2026	2031	2036	2039	Growth 2021-2039
Convenience	599.3	622.2	641.2	662.4	675.0	12.6%
Comparison	864.2	1,011.5	1,179.5	1,385.4	1,527.6	76.8%

Source: Tables 2a & 8, Appendix D

- 6.32 Convenience goods expenditure across the study area is forecast to grow by 12.6% over the period to 2039, reflecting the growing resident population and relative reduction in spending per capita over the period. Comparison goods estimates show a far greater growth of 76.8% over the plan period as a result of sustained increases in spending growth rates in addition to population growth. We go on to consider the implications of this spending growth based on the identified market shares in terms of capacity for stores across Wealden and beyond.

Convenience Goods Market Share

- 6.33 Having examined population and expenditure base data, we go on to examine the spatial distribution of convenience goods spend by residents across the Study Area. Figure 16 specifically examines where Study Area residents are spending their money.
- 6.34 The results show that destinations in Wealden District account for 55.4% (£332.1m) of convenience goods spending of all Study Area residents in 2021 (£599.3 m per annum).
- 6.35 Whilst the majority of this spend is focussed in and around the 'higher order' centres that are the primary focus of this study, almost 2% of spend (equating to over £10.3m) is carried out across local centres and villages. In our experience, this is a healthy sign, particularly given that such facilities often serve more of a day-to-day, top-up function for local residents.

6.36 The remaining 44.6% (£267.1m) of spending carried out by residents of the Study Area, or 'leakage', takes place at destinations beyond Wealden District that includes East Grinstead (9.6%), Eastbourne (8.0%), Royal Tunbridge Wells (5.5%) and Lewes (4.8%).

Figure 16. Convenience Goods Market Share by Destination

Destination	Total Market Share Convenience (%)	Total Market Share Convenience (£m at 2021)
Study Area	61.9%	£371.1m
Wealden District	55.4%	£332.1m
In-Centre (in Wealden District)	45.0%	£269.4m
Hailsham Town Centre	17.6%	£105.7m
Heathfield Town Centre	3.9%	£23.4m
Uckfield Town Centre	9.6%	£57.8m
Crowborough Town Centre	9.6%	£57.4m
Forest Row District Centre	1.2%	£7.1m
Polegate District Centre	0.7%	£4.2m
Wadhurst District Centre	0.6%	£3.6m
Local Centres / Villages	1.7%	£10.3m
Out of Centre (in Wealden District)	10.5%	£62.7m
Leakage (out of Wealden District)	44.6%	£267.1m
Outside of Wealden District (in Study Area)	6.5%	£39.0m
Outside of Wealden District (out of Study Area)	38.1%	£228.2m
Total	100.0%	£599.3m

Source: Figure 6, Experian Retail Planner Briefing Note 18, October 2020

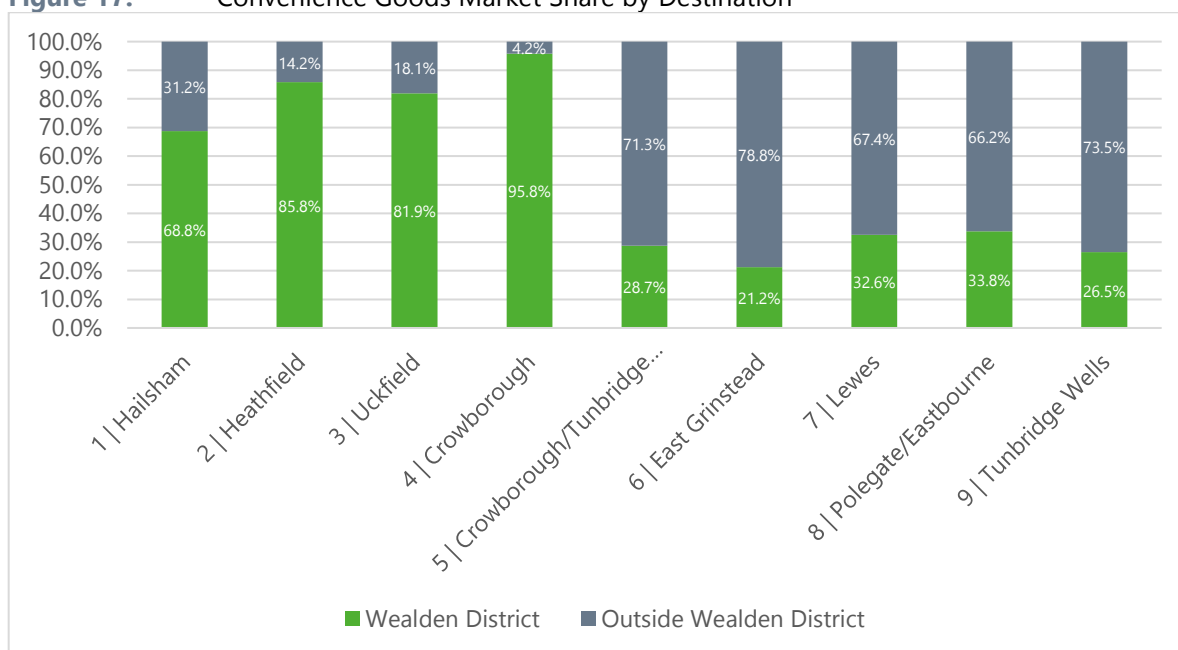
6.37 The vast majority of convenience goods spending retained within Wealden is to in-centre retailers (within designated town centre boundaries), equating to 45.0%, significantly outperforming the out-of-centre offer (10.5%). The following specific findings for town centres in Wealden are detailed below.

- The most popular destination in Hailsham is the Tesco Superstore on North Street (9.6%), followed by Asda (3.8%) and Waitrose (3.8%), whilst the out-of-centre Tesco Express attracts 0.6%.
- In Uckfield, the town centre Tesco Superstore at Bell Farm Road dominates the convenience food market with 8.2% market share, whilst the Waitrose on the High Street accounts for just 1.3% of all convenience shopping.
- The Co-op on the High Street is the most popular store in Heathfield (2.2%), whilst Sainsbury's attracts 1.4% and the out-of-centre Waitrose accounts for 1.0% of convenience spending across the Study Area.
- Crowborough's Morrisons on Pine Grove attracts 6.6% of trade, whilst the Waitrose on Croft Road takes 2.8%. However, the out-of-centre Tesco Superstore at Sybron Way accounts for 3.4% of spending with the Lidl at Beacon Road also attracting 1.5%.

- Notably, the out-of-centre Lidl at Dittons Drive is the most popular destination in Polegate with 2.1% of trade, compared to 0.7% from local stores (including a Co-op) within the designated centre.

6.38 We are also able to examine the destination of convenience goods spend within each Zone of Wealden District. Figure 17 below examines the amount of convenience goods spending undertaken inside Wealden District by residents of each Zone.

Figure 17. Convenience Goods Market Share by Destination



Source: Appendix D

6.39 The survey findings for convenience goods show that residents of Zones 1-4 (which include the larger town centres of Hailsham, Heathfield, Uckfield and Crowborough) are those who predominantly look towards Wealden District, with the District retaining between 68.8% and 95.8% of residents spending. This is unsurprising given the significant provision of national multiple convenience retailers in each centre.

6.40 Given the attraction of the centres' respective grocery shopping provision, it is also expected that there would be a degree of inflow of trade from outside of the Study Area based on the findings of recent studies in the adjoining authorities. The Tunbridge Wells Retail and Leisure Study, 2017 and its subsequent 2021 update (both prepared by Nexus) incorporated an extensive household survey (undertaken in 2016) that covered a significant area (reflecting the draw of Royal Tunbridge Wells). Not including zones that covered Wealden itself, residents from beyond the District were found to account for approximately £4m of expenditure in Hailsham,

£5m in Heathfield, £1m in Uckfield and £8m in Crowborough. It is worth highlighting that the above inflow figures are an estimation based on previously published data across a study area that does not extend the same distance in all directions, but this is nonetheless useful as a point of reference.

- 6.41 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading over or below expectations. This is summarised at Figure 18 below, including assumptions for the inflow of trade.

Figure 18. Convenience Goods Turnover Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover inc. inflow (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Hailsham Town Centre	£77.6m	£111.0	£28.1m	36.2%
Heathfield Town Centre	£35.3m	£24.5	-£12.0m	-33.9%
Uckfield Town Centre	£55.3m	£60.7	£2.5m	4.5%
Crowborough Town Centre	£87.4m	£60.2	-£30.0m	-34.3%
Hailsham (Out of Centre)	£2.6m	£3.9	£1.1m	41.3%
Heathfield (Out of Centre)	£7.2m	£6.1	-£1.4m	-19.0%
Crowborough (Out of Centre)	£32.8m	£31.9	-£2.4m	-7.3%
Polegate (Out of Centre)	£13.4m	£14.3	£0.9m	7.0%
Wealden District	£345.3m	£346.3	-£13.1m	-4.0%

Source: Table 5, Appendix D

- 6.42 The results show that the convenience floorspace in Wealden District is underperforming when considered cumulatively. Facilities across Heathfield and Crowborough are performing below benchmark levels, a pattern that follows across both in-centre and out-of-centre destinations. This suggests that these areas are potentially over-stocked in terms of convenience retail floorspace. Nonetheless, stores in Hailsham and Uckfield are performing above benchmark levels, with the Tesco Superstore at North Street almost entirely responsible for the over-performance in Hailsham, a pattern that is not replicated to the same degree for out-of-town facilities.
- 6.43 We have also looked at the performance of the individual stores in Wealden, with Figure 19 below setting out the 'Top 5' best and worst performing stores.

Figure 19. Best and Worst Performance Benchmarking

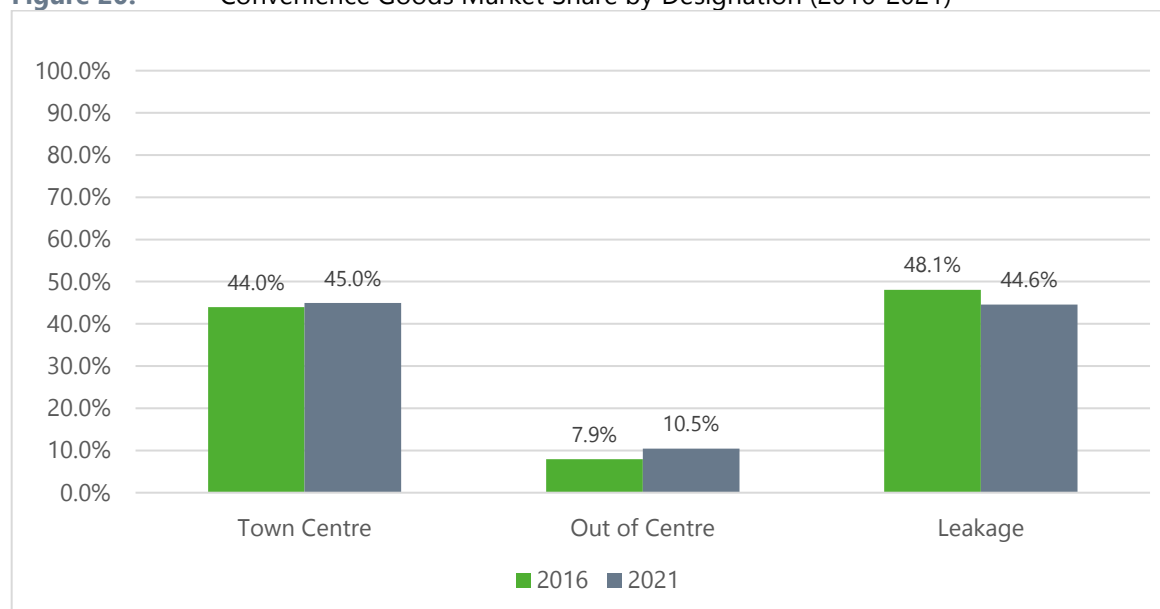
Destination	Benchmark Turnover (£m)	Survey Turnover inc. inflow (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Best Performing				
Tesco Superstore, North Street, Hailsham	£33.0m	£57.4m	£24.4m	74.0%
<i>Tesco Express, South Road, Hailsham</i>	<i>£2.6m</i>	<i>£3.7m</i>	<i>£1.1m</i>	<i>41.3%</i>
Tesco Superstore, Bell Farm Road, Uckfield	£35.6m	£49.1m	£13.5m	37.9%
<i>Lidl, Dittons Drive, Polegate</i>	<i>£9.9m</i>	<i>£12.8m</i>	<i>£2.9m</i>	<i>29.0%</i>
Asda, The Quintins, North Street, Hailsham	£19.0m	£23.0m	£4.0m	21.0%
Worst Performing				
Waitrose, High Street, Uckfield	£18.9m	£7.9m	-£11.0m	-58.2%
Iceland, High Street, Hailsham	£4.9m	£2.1m	-£2.8m	-56.9%
<i>Tesco Express, Eastbourne Road, Polegate</i>	<i>£3.5m</i>	<i>£1.5m</i>	<i>-£1.9m</i>	<i>-55.7%</i>
Waitrose, Croft Road, Crowborough	£34.2m	£16.8m	-£17.4m	-50.8%
Co-op, High Street, Heathfield	£23.8m	£13.0m	-£10.8m	-45.3%

Note: Out-of-centre destinations in *italics*

Source: Table 5, Appendix D

Local Market Share Trends

6.44 We set out below a comparison of 2021 market share data for convenience goods against the findings of the previous 2016 Wealden Town Centre and Retail Study.

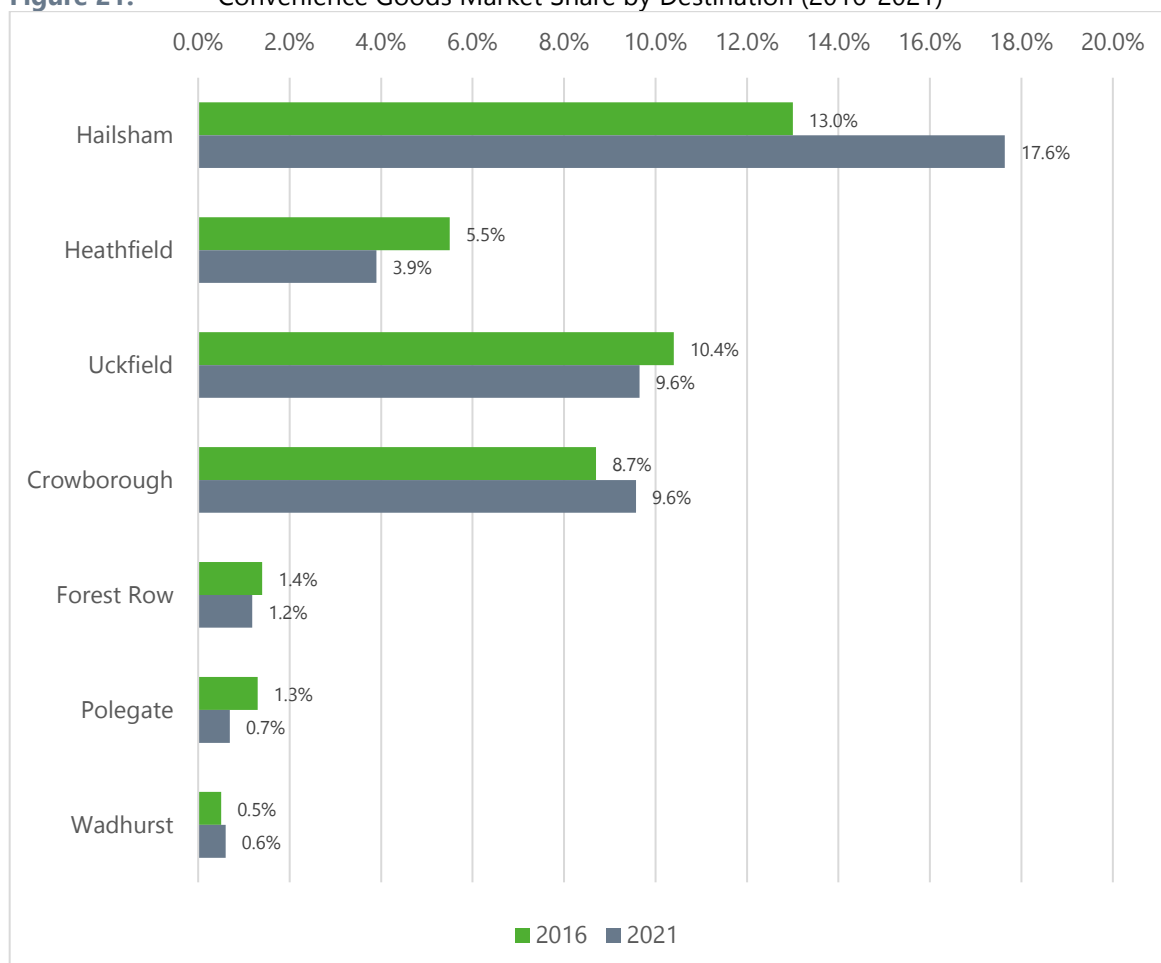
Figure 20. Convenience Goods Market Share by Designation (2016-2021)


Source: Appendix D & Wealden Town Centre and Retail Study 2016

6.45 Notably, leakage to facilities outside of the District has fallen by four percentage points (with the majority of 'clawed-back' trade directed towards out-of-centre locations).

- 6.46 An assessment of the 2016 data (reweighted to strip out internet shopping) identifies both growth and reductions in the level of leakage from individual locations with rising convenience spending to East Grinstead (from 8.8% to 9.6%), whilst convenience leakage has fallen in Eastbourne (10.6% to 8.0%), Royal Tunbridge Wells (6.1% to 5.5%) and Lewes (5.0% and 4.8%). Whilst these are somewhat marginal changes in context, the cumulative reduction of convenience spending outside of the District is a positive development.
- 6.47 Overall though, we identify a relatively consistent position over the past 5 years, with Wealden's town centres cumulatively attracting just one percentage point greater proportion of trade. There is a similar degree of consistency when considering the draw of each town centre on an individual basis.
- 6.48 Hailsham Town Centre has increased its market share from 13.0% to 17.6% since 2016, which may have come through the 'claw-back' of trade from Eastbourne. The other centres have remained within two percentage points of their 2016 position.

Figure 21. Convenience Goods Market Share by Destination (2016-2021)



Source: Appendix D & Wealden Town Centre and Retail Study 2016

Comparison Goods Findings

Market Shares

- 6.49 Turning to comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 7-18 of **Appendix D**.
- 6.50 To begin with, we look at the overall comparison goods spend by residents across the Study Area. The results show that destinations in Wealden District account for 24.2% (£209.4m) of the spending of all Study Area residents in 2021 (£864.3m per annum). The remaining 75.8% (£654.8m) of spending carried out by residents of the Study Area is spent at destinations beyond Wealden District. Figure 22 below specifically examines where Study Area residents are spending their money.

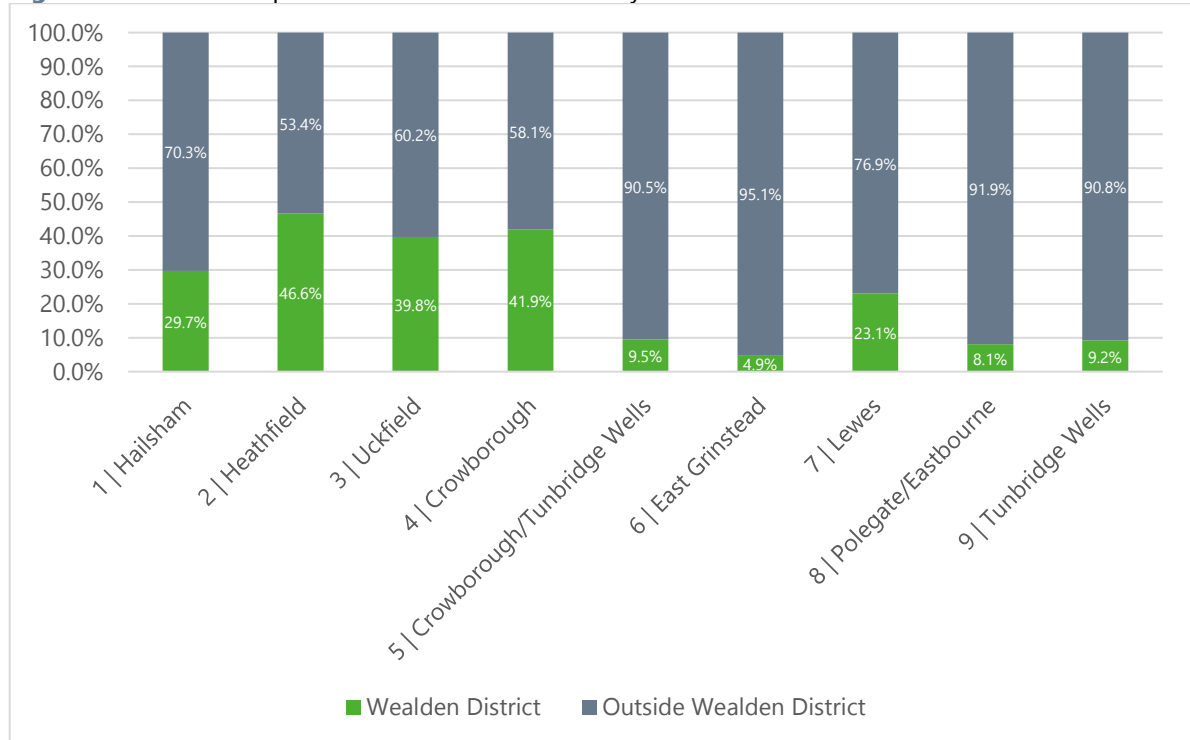
Figure 22. Comparison Goods Market Share by Destination

Destination	Total Market Share Convenience (%)	Total Market Share Convenience (£m at 2021)
Study Area	29.1%	£251.8m
Wealden District	24.2%	£209.4m
In-Centre (in Wealden District)	19.9%	£172.1m
Hailsham Town Centre	5.9%	£51.3m
Heathfield Town Centre	2.9%	£25.0m
Uckfield Town Centre	5.3%	£46.1m
Crowborough Town Centre	4.1%	£35.6m
Forest Row District Centre	0.2%	£1.7m
Polegate District Centre	0.4%	£3.9m
Wadhurst District Centre	0.4%	£3.7m
Local Centres / Villages	0.6%	£4.8m
Out of Centre (in Wealden District)	4.3%	£37.3m
Leakage (out of Wealden District)	75.8%	£654.8m
Outside of Wealden District (in Study Area)	4.9%	£42.3m
Outside of Wealden District (out of Study Area)	70.9%	£612.5m
Eastbourne	21.3%	£183.8m
Royal Tunbridge Wells	20.4%	£176.5m
Brighton	6.1%	£52.3m
East Grinstead	5.3%	£46.2m
Crawley	4.2%	£36.7m
Bexhill-on-Sea	2.7%	£23.6m
Lewes	2.6%	£22.2m
Seaford	1.6%	£13.6m
Haywards Heath	1.3%	£11.2m
St Leonards	1.1%	£9.1m
Hastings	1.0%	£8.9m
Others	7.6%	£65.9m
Total	100.0%	£864.3m

Source: Tables 25a & 25b, Appendix D

- 6.51 The results above show that town centre locations are the most popular destinations in Wealden (19.9% of the 24.2% market share). Within that grouping, Hailsham (5.9%) and Uckfield (5.3%) are the most popular comparison goods destinations for Study Area residents. Hailsham Retail Park is the most popular of the out of centre facilities within the District, attracting over half (2.3%) of comparison goods spending (4.3%) in this category.
- 6.52 Whilst local centres and villages do not typically provide a 'destination' comparison goods function, they do serve more of a day-to-day function supporting the greater range of provision across higher order centres. In this context, the almost £5m of trade across the local and village centres demonstrates a healthy level of local comparison goods retail provision to support the local convenience and service offer.
- 6.53 In contrast, 75.8% of Study Area resident's comparison goods spending is spent outside of the District. The most popular destinations, by some margin, are Eastbourne (21.3%) and Royal Tunbridge Wells (20.4%). Otherwise, spending is spread across a wide range of surrounding towns with Brighton, East Grinstead and Crawley attracting 6.1%, 5.3% and 4.2% respectively.
- 6.54 A number of other smaller centres also attract spending, which is likely due to trips to specialised stores or destinations linked with other reasons for travelling (such as work, or family visits). Whilst this out-of-district spending is not necessarily at a level that raises any cause for concern, it is a notable feature of the spending habits of the study area's residents.
- 6.55 As with our previous assessment of convenience goods, we are also able to examine the degree of comparison goods spend within each Zone.
- 6.56 Figure 23 examines the amount of comparison goods spending carried out inside Wealden District by residents of each Zone. For reference, Zones 4, 5 and 6 cover the north of the District, Zones 2 and 3 cover the east and west of the centre of Wealden (respective), whilst Zones 1 and 8 are located to the southern boundaries of the District. Zone 7 partly covers the area outside of Wealden to the west and Zone 9 partly covers hinterland outside of the District to the east.

Figure 23. Comparison Goods Market Share by Destination



Source: Appendix D

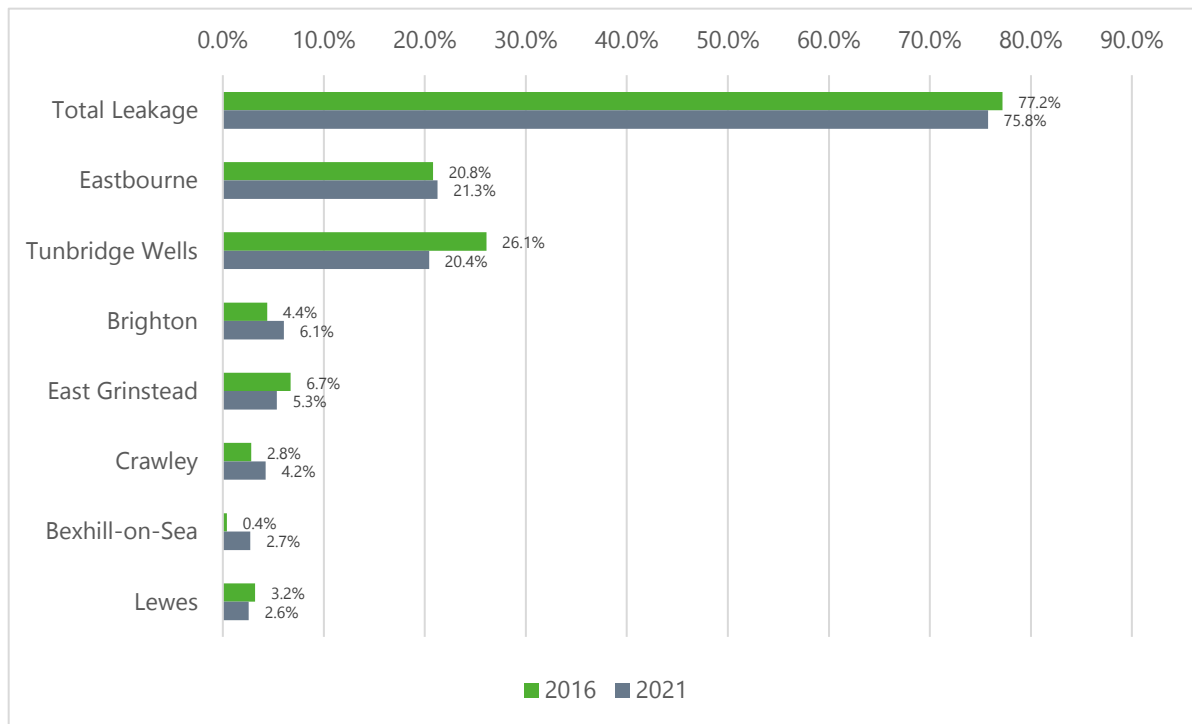
- 6.57 The survey findings for comparison goods show that, whilst the majority of trade across all Zones has leakage outside of the District, residents of Zones 1-4 have a noticeably higher proportion of spending within Wealden District (ranging from 29.7% in Zone 1 to 46.6% in Zone 2). This is a similar market share pattern to that found for convenience goods. Interestingly, Zone 7 (Lewes) residents also spend a notable proportion (23.1%) of comparison goods spending within Wealden, and in particular in Uckfield (12.1%)
- 6.58 In terms of spending outside the District, Table 25a of **Appendix D** shows that residents in Zones 1 and 8 tend to gravitate towards Eastbourne, whilst residents in Zones 2, 3, 4, 5 and 9 lean towards Royal Tunbridge Wells.
- 6.59 Residents in Zone 6 largely gravitate towards Crawley, whilst residents in Zone 7 gravitate towards Lewes. These results strongly skew in favour of geographic hubs and do not present any significantly surprising results.
- 6.60 In Figure 24, we also analyse the market share of different types of comparison goods, considering which items are purchased from stores and centres inside Wealden District, and what the propensity is to travel further afield for certain items.

Figure 24. Comparison Goods Market Share by Destination

Destination	Wealden District Market Share (%)	Leakage Market Share (%)
Non-Bulky Goods	22.4%	77.6%
Clothing & Footwear	5.9%	94.1%
Media	37.1%	62.9%
Small Household Goods	16.2%	83.8%
Recreation Goods	33.0%	67.0%
Chemist Goods	50.2%	49.8%
Bulky Goods	29.0%	71.0%
Electrical Goods	24.1%	75.9%
DIY & Gardening	41.0%	59.0%
Furniture Goods	25.7%	74.3%
All Comparison Goods Average	24.2%	75.8%

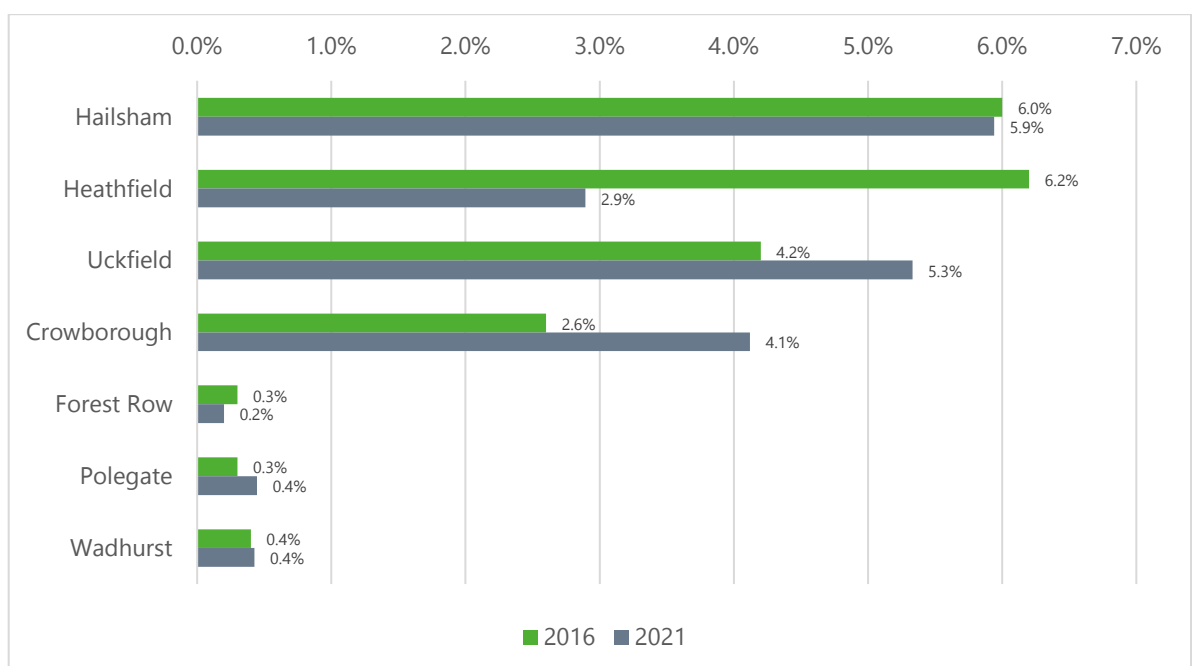
Source: Tables 25a & 25b, Appendix D

- 6.61 The results show that 24.2% of the comparison goods spending of residents living in the Study Area is carried out in Wealden District. Generally speaking, there is broad conformity to the market shares across the broader non-bulky and bulky goods categories.
- 6.62 Across the individual categories, leakage is significantly higher for clothing and small household goods, whilst residents spend more locally on Chemist, DIY and gardening goods categories.
- 6.63 In Figures 25 and 26 below, we examine the market share attracted to Wealden District from each of the Study Area Zones in both 2016 and 2020. The 2016 data is taken from the Council's previous Retail Study, produced using identical Study Area Zones, and so a like-for-like analysis is possible.
- 6.64 Overall, Figure 25 paints a relatively consistent picture, with total comparison goods market share leakage falling marginally from 77.2% to 75.8%. There are nonetheless a few notable trends with leakage to Tunbridge Wells falling from 26.1% to 20.4%, whilst we find small increases across Eastbourne, Brighton, Crawley and Bexhill-on-Sea.

Figure 25. Comparison Goods Market Share Leakage (2016-2021)

Source: Appendix D & Wealden Town Centre and Retail Study 2016

6.65 Hailsham, Forest Row, Polegate and Wadhurst show remarkably consistent comparison goods market shares over the last five years, whilst comparison goods spending in Heathfield has halved since 2016 and spending has risen across both Uckfield and Crowborough.

Figure 26. Comparison Goods Market Share by Destination (2016-2021)

Source: Appendix D & Wealden Town Centre and Retail Study 2016

- 6.66 In light of the foregoing, our market share analysis shows that the District has, overall, fared reasonably well over the period 2016-2021. The District has retained its market share of comparison goods over the period, even in light of sizable regional competitors, with minimal internal competition from out-of-centre destinations within Wealden District.
- 6.67 However, the findings clearly identify that the centres do not provide significant comparison goods destinations in their own rights and that alternative uses will be required to support those centres. This presents a challenge to overcome when it comes to providing for future land uses in town centres.

Internet and 'Special Forms of Trading'

- 6.68 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Convenience Goods Online Shopping

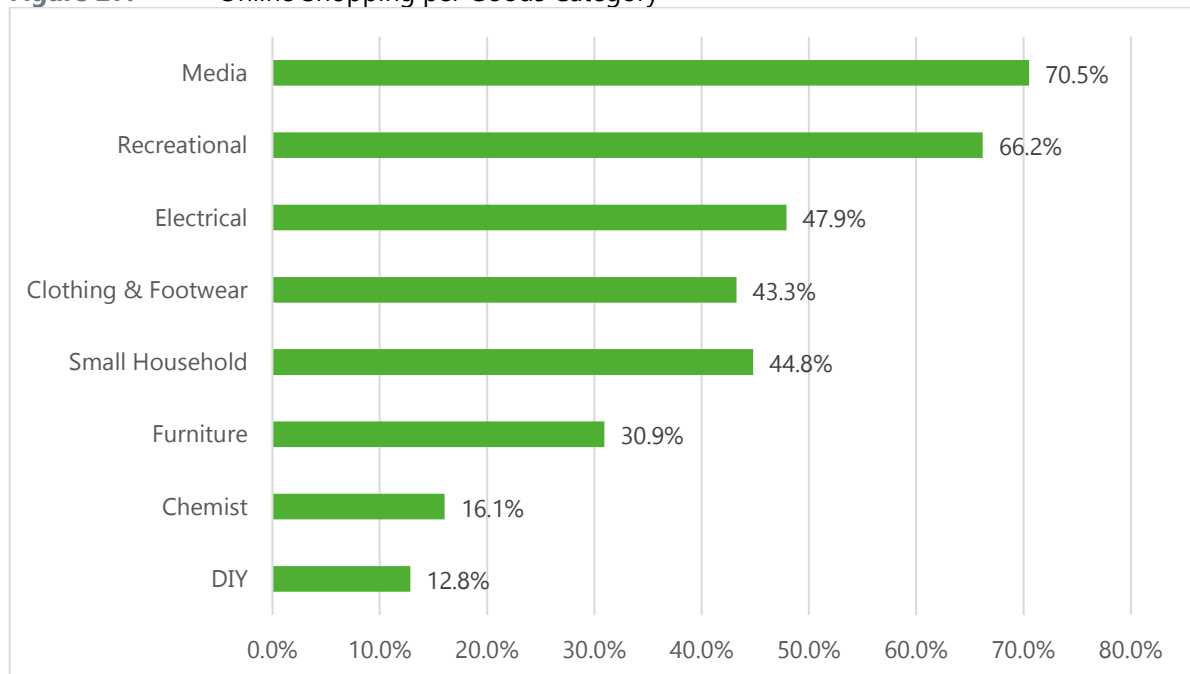
- 6.69 As discussed earlier in this chapter, the household survey conducted by NEMS asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 6.70 Across the Study Area, 18.4% of respondents shop online for their main food shop. As set out in Chapter 4, the UK average for online convenience shopping in 2021 is 18.1%. As such, the take-up of online convenience shopping in the Study Area is broadly in line with the UK average. The online trade across the Study Area is dominated by Tesco (35.7%), Sainsbury's (23.3%), and Ocado (22.9%).
- 6.71 The household survey also asked residents of the Study Area about how their online convenience shopping habits have been affected by Covid-19. Before the Covid-19 pandemic and first lockdown, 28.5% of the Study Area residents had shopped for groceries online at some point. During the lockdowns, this number increased to 43.3%. Since the lockdown restrictions have been lifted, this figure has decreased somewhat to 39.7%, but remains significantly higher than before Covid-19 pandemic and lockdowns, a trend reflected in Experian's own forecasts.
- 6.72 This suggests that the Covid-19 pandemic, and in particular the lockdowns, had resulted in a habitual change in the Study Area, whereby the overall preference for online groceries shopping has increased. Given the relatively short amount of time that has passed since the lockdowns, we would caution that it is difficult to establish the lasting impacts of such changes,

although it is clear that in the short-term, such changes have remained.

Comparison Goods Online Shopping

- 6.73 The household survey conducted by NEMS also asked where respondents usually shop for different types of comparison goods. The findings are presented in Figure 27, which shows the take-up for online shopping varying across the different categories. This ranges from 12.8% for DIY goods to 70.5% for media (such as books, CDs, DVDs, etc.) On average, within the Study Area, 40.4% of respondents shop online for comparison goods, compared with a lower UK average of 29.1%.

Figure 27. Online Shopping per Goods Category



Source: NEMS Household Survey

- 6.74 The household survey also asked residents of the Study Area about how their online comparison-shopping habits have been affected by Covid-19.
- 6.75 Before the first lockdown, 81.0% of the Study Area had previously shopped for comparison goods online. During the lockdowns, this number rose to 85.7%. Since the lockdown restrictions have been lifted, this figure dropped slightly to 85.2%. Whilst this is somewhat of a 'jump'; overall, this change is not considered significant in the context of wider long-term trends and demonstrates the continued strength of the internet in meeting resident's comparison goods needs.
- 6.76 Equally, when comparing pre-lockdown and post-lockdown frequency of online shopping,

21.1% of the Study Area residents now shop online more often; 62.6% shop with the same frequency; and 9.3% shop online less often than before the pandemic (the remaining 7.1% were not able to give an answer).

Leisure Facilities

- 6.77 The results of the NEMS Household Telephone survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the survey enables us to analyse quantitative participation rates and patterns of travel alongside qualitative responses on potential deficiencies within the District.

Existing Market Shares

- 6.78 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 33-43) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full within Appendix D and we extrapolate the key results here.
- 6.79 It is important to acknowledge that residents outside the District may visit facilities within the District for leisure, recreation and cultural activities, as well as vice-versa. However, whilst we are cognisant of inflows and outflows of residents, the purpose of this section is to review the leisure patterns of District residents in order to assist the Council in planning for residents' requirements and identify any distinct 'need' over the plan period. Leisure developers and occupiers are unlikely to express interest in delivering new leisure opportunities unless there is strong evidence of local demand for such facilities, which is why such developments are largely market-led. Nonetheless, strong local demand can still demonstrate capacity and even need (in NPPF terms) for such facilities. Therefore, whilst we focus our review of the results of the household survey across the full Study Area, we undertake our benchmark analysis on the basis of the District's population.
- 6.80 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities for those who were interviewed across the Study Area. In Question 33 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results in Figure 28 below.

Figure 28. Participation in Leisure Activities (%)

Activity	Study Area Participation (%)
Restaurant	73.7%
Pub / bars / nightclubs	60.4%
Cinema	52.5%
Theatres / concert halls / museums / art galleries and other cultural facilities	50.2%
Indoor sports or health and fitness activity	30.9%
Ten pin bowling	19.6%
Bingo	2.6%
(None mentioned)	11.9%

Source: Q33, Appendix C

6.81 From the survey, the most popular leisure activity for those interviewed was to visit a restaurant, of which 73.7% of respondents indicated they do at least occasionally. The second most popular activity is going to pubs/bars/nightclubs (60.4%), closely followed by cinema trips (52.5%) and visits to cultural facilities such as theatres'/museums/art galleries (50.2%). Playing bingo (2.6%) is the least popular activity, followed by ten-pin bowling (19.6%). Generally speaking, these visitation rates are similar to those we have experienced in most parts of the UK.

6.82 NEMS also asked a series of questions to understand where residents of each zone usually undertake their chosen leisure activity. We examine the most popular destinations for Study Area residents in Figure 29.

Figure 29. Most Popular Leisure Destinations (%)

Activity	1 st choice	2 nd choice	3 rd choice
Indoor health & fitness	Freedom Leisure, Hailsham (12.5%)	Crowborough Leisure Centre (9.2%)	Uckfield Leisure Centre (9.0%)
Cinema	<i>Cineworld, Eastbourne (22.9%)</i>	Picture House Cinema, Uckfield (22.3%)	<i>Odeon, Tunbridge Wells (19.5%)</i>
Restaurant	<i>Eastbourne Town Centre (12.5%)</i>	<i>Tunbridge Wells Town Centre (11.3%)</i>	Uckfield Town Centre (7.7%)
Pub / bars / nightclubs	Uckfield Town Centre (7.7%)	Hailsham Town Centre (6.7%)	<i>Eastbourne Town Centre (6.5%)</i>
Ten pin bowling	<i>Hollywood Bowl, Tunbridge Wells (31.9%)</i>	<i>Tenpin, Eastbourne (27.6%)</i>	<i>Hollywood Bowl, Brighton (16.0%)</i>
Bingo	<i>Leo Leisure, Eastbourne (17.4%)</i>	<i>Bingo at the Deluxe, Hastings (11.1%)</i>	<i>Bexhill Comrades Club, Bexhill-on-Sea (9.3%)</i>
Cultural facilities	<i>West End, London (43.2%)</i>	<i>Eastbourne Town Centre (11.6%)</i>	<i>Congress Theatre, Eastbourne (6.8%)</i>

Note: Facilities outside of the District in grey *italics*; facilities in the District in green

Source: Q34-40, Appendix C

6.83 Figure 29 generally highlights that Study Area residents will typically travel outside of the District for their leisure and cultural trips, with the exception of indoor health & fitness and pubs / bars / nightclubs. These are the activities that benefit from being closer to home and it is indicative of the overall offer that the first two choices for restaurant destinations (another

activity that suits shorter travel times) are outside of the District. Whilst the top three responses for bowling were all located outside of Wealden, it is worth noting that the Freedom Leisure Centre in Hailsham also serves as a ten pin bowling destination for 13.6% of Study Area residents.

- 6.84 Eastbourne (cinema, restaurants and bingo), Tunbridge Wells (bowling) and London (cultural facilities) were the most popular destinations for leisure facilities in the Study Area. Only health & fitness facilities, and pubs, bars & nightlife, were residents more likely to visit destinations in Wealden.

7 Retail and Leisure Capacity Assessment

Introduction

- 7.1 One of the key aims of this Study is to provide recommendations on the capacity for new retail and leisure floorspace to meet any identified need in Wealden over the plan period to 2039. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Chapter 4, one such example has been the economic implications of the United Kingdom leaving the European Union and the social distancing and lockdown measures necessitated by the Covid-19 pandemic.
- 7.2 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to a justification for new retail floorspace in itself (especially in out-of-centre locations). Any such development would be required to be assessed in line with the NPPF and Local Plan policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.
- 7.3 Detailed quantitative retail capacity tables are enclosed at **Appendix D**.

Convenience Goods Capacity

- 7.4 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

$$\text{Available Expenditure (£m)} - \text{Turnover of existing \& proposed (£m)} = \text{Surplus or Deficit (£m)}$$

- 7.5 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.
- 7.6 The turnover of existing retailers across the Study Area is calculated based on average sales

- densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.
- 7.7 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 7.8 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.
- 7.9 As discussed in detail at Chapter 6, the NEMS household survey results show that facilities within the District have a 55.4% convenience goods market share of all spending carried out by residents of this Study Area.
- 7.10 When assessing the capacity for new convenience retail floorspace, we adopt a constant market share in line with findings of the latest household survey (i.e. that stores within the District will continue to draw 55.4% of all convenience goods spending from the Study Area). We consider that maintaining a constant market share is a sensible basis for the analysis given the relative lack of planned developments across the Study Area (see Chapter 3).
- 7.11 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2039, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 18, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.

7.12 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of

Appendix D and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publically available databases or, where data is not available, Nexus' professional judgement based on site visits.
- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, having reviewed market share patterns into Wealden as identified in other studies across the region, we agree with the assumptions made in the previous Wealden Retail and Town Centre Study (2016) and adopt similar figures of an additional 5% inflow to both in and out-of-centre facilities across Hailsham, Heathfield, Uckfield and Crowborough.

7.13 We then calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading), or below (under-trading) company averages.

7.14 Based on the NEMS household survey, we identify in Table 4 of **Appendix D** that Wealden's convenience retailers within the Study Area turnover an estimated £332.1m of Study Area residents spend at 2021.

7.15 Accounting for inflow in terms of convenience spending, this equates to an initial surplus of £1.1m (see Table 5, **Appendix D**). In essence, this 'surplus' is additional spending by residents

over and above the level that would be expected when we account for the average performance of stores (against benchmark levels) and anticipated natural growth in turnover (as set out by Experian, through efficiencies and new technologies). This 'surplus' is considered to be money that is theoretically available to support new retail floorspace (capacity).

- 7.16 Figure 30 sets out the resultant surplus convenience goods expenditure at each assessment date, rising to £42.0m by 2039 (see Table 6a).

Figure 30. Gross Convenience Goods Surplus Expenditure in Wealden

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2021	345.3	332.1	14.2	1.1
2026	348.1	344.9	14.8	11.6
2031	348.1	355.4	15.2	22.5
2036	348.1	367.1	15.7	34.8
2039	348.1	374.1	16.0	42.0

Source: Table 6a, Appendix D

Figure 31. Gross 'capacity' for new convenience goods facilities in Wealden

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2021	1.1	100	100
2026	11.6	1,000	1,500
2031	22.5	2,000	2,900
2036	34.8	3,000	4,400
2039	42.0	3,700	5,300

Source: Table 6b, Appendix D

- 7.17 We then go on to consider committed and extant permissions for new convenience retail floorspace. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace, but consider development proposals for which a formal planning application has either been submitted or approved.
- 7.18 A complete list of the commitments considered in our capacity assessment is provided at Table 6c of the statistical tables presented at **Appendix D**. In total, these committed developments equate to a net convenience floorspace of 565 sq m and an estimated turnover of £4.5m across developments at The Crèche in Hellingly, and the retail provision with the allocation at land east of Park Road, Hailsham.
- 7.19 Taking account of committed turnover, we identify a negative residual expenditure of -£3.5m at

2021, rising to £37.5m by 2039. A significant proportion of this residual expenditure is made up from inflow to facilities in the District in the earlier years of the assessment, though over time, population and expenditure growth become more of a factor.

- 7.20 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for Wealden District.

Figure 32. Net quantitative 'capacity' for new convenience goods facilities in Wealden

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2021	1.1	4.5	-3.5	-300	-400
2026	11.6	4.6	7.0	600	900
2031	22.5	4.6	18.0	1,600	2,300
2036	34.8	4.6	30.2	2,600	3,800
2039	42.0	4.6	37.5	3,300	4,800

Source: Table 6d, Appendix D

- 7.21 This quantitative capacity is calculated to grow from a negative capacity at 2021 to a positive capacity of between 600 sq m and 900 sq m by 2026. Over the plan period, this capacity continues to rise to between 1,600 sq m and 2,300 sq m by 2031, between 2,600 sq m and 3,800 sq m by 2036 and between 3,300 sq m and 4,800 sq m by 2039.

Convenience Capacity Summary

- 7.22 In purely quantitative terms, the convenience goods spending capacity identified is considered to be sufficient to support the provision of new convenience retail floorspace over the plan period.
- 7.23 However, we would caution proposing new convenience retail allocations purely on the basis of the quantitative capacity assessment. In the current retail landscape, and given the need to support existing convenience retailers in the town centres, we would suggest that any evidence for new allocation are also supported by a qualitative need (such as demonstrable underprovision or lack of choice) or spatial planning considerations (such as an urban expansion or a significant housing development in the local area).
- 7.24 Given current economic uncertainties and, more relevantly, pressures on the retail sector, we would stress the need to treat long-term forecasts with caution. As highlighted within the

PPG60: *"Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed."* (our emphasis)

- 7.25 Additionally, as referenced above, capacity does not equate to need. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such as any residents' dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground from our health check work. Fundamentally, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.
- 7.26 Notably, we have identified a significant overprovision of convenience goods floorspace across both Heathfield and Crowborough, and would consider that any allocations for new retail floorspace should take into account an assessment of the performance and vitality and viability of a centre (as we go on to assess in the following chapter) in order to ensure that any identified capacity meets both a quantitative and qualitative need, and does not harm existing businesses.
- 7.27 Additionally, as previously noted, assumptions of inflow spending of residents from beyond Wealden's boundaries alone equates to between 1,300 sq m and 1,900 sq m of capacity by 2031, rising to between 1,400 sq m and 2,000 sq m in 2039. This is a significant proportion of the forecast capacity and we would therefore query whether the modelled capacity truly equates to a need and whether it is desirable to bring forward new convenience goods floorspace within the Plan period.
- 7.28 In the circumstances, we consider that the limited convenience goods floorspace capacity identified over the plan period (and over the next five years in particular) should be used to bolster existing or proposed stores within existing centres in the retail hierarchy and would not recommend seeking new convenience retail allocations.

Comparison Goods Capacity

- 7.29 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of

⁶⁰ (Town Centres and Retail) Planning Practice Guidance, Paragraph: 004, Reference ID: 2b-004-20190722

town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate depending on a number of local variables, most notably the location relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity).

- 7.30 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2021, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2039.
- 7.31 For the purposes of our assessment, we have assumed that the District's attraction to Study Area residents will remain constant at 24.2% of all spending proportionate to population growth (Table 26a of **Appendix D**). Based on the scale of planned developments in the District and through discussions with neighbouring authorities, we consider this a robust basis for analysis. This equates to a total turnover of £370.1m by 2039. We also make the assumption that some facilities in Wealden will attract additional turnover from tourists, commuters and other visitors from outside of the surveyed Study Area. This additional expenditure, or 'inflow', equates to £9.4m of turnover, or 4.5% of additional expenditure.
- 7.32 Taking account of population and expenditure growth and forecast floorspace efficiencies, as detailed in Chapter 6, including more efficient reconfigurations to store layouts, improvements in stores supply chains and the incorporation of new technologies (such as self-scan checkouts) in retailers over the plan period, we identify an initial negative surplus expenditure of -£2.8m in 2026, rising to £26.1m by 2039.
- 7.33 Figures 33 and 34 below set out the resultant gross comparison goods capacity forecast for both surplus expenditure and gross 'capacity' for new comparison good facilities over the Plan period.

Figure 33. Gross Comparison Goods Surplus Expenditure in Wealden

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2021	218.8	209.4	9.4	0.0
2026	257.3	245.1	11.0	-1.3
2031	293.7	285.8	12.8	4.9
2036	333.9	335.7	15.0	16.8
2039	360.7	370.1	16.6	26.1

Source: Table 26a, Appendix D

Figure 34. Gross 'capacity' for new comparison goods facilities in Wealden

Year	Surplus Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2021	-	-	-
2026	-1.3	-200	-200
2031	4.9	500	700
2036	16.8	1,600	2,200
2039	26.1	2,300	3,200

Source: Table 26b, Appendix D

7.34 We then considered committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace that are not likely to come forward over the plan period.

7.35 In total, these committed developments equate to a net 1,133 sq m of comparison goods floorspace and an estimated turnover of £6.8m (see Table 26c at Appendix D), primarily arising from the Dittons Nursery redevelopment at Stone Cross. The assessment also takes account of applications that will result in the significant loss of retail floorspace, including Kensington Appliances in Heathfield and The Old Loom Mill in Hailsham. These commitments are then projected forwards and deducted from the surplus expenditure set out in Figure 35. Once accounted for, we are able to calculate the net comparison goods capacity.

Figure 35. Net quantitative 'capacity' for new comparison goods facilities in Wealden

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2021	-	-	-	-	-
2026	-1.3	8.0	-9.3	-1,100	-1,600
2031	4.9	9.1	-4.2	-500	-600
2036	16.8	10.4	6.4	600	800
2039	26.1	11.5	14.8	1,300	1,800

Source: Table 26d, Appendix D

7.36 A negative capacity denotes that projected increases in overall spending (through population growth) will not keep up with increases in turnover (through sales efficiencies) and further turnover at commitments. As such, there is no extra money forecast to provide capacity to support new forecast and meet any identified needs. Taking account of committed turnover, we identify an initial negative residual expenditure of -£9.3m at 2021, rising to £14.8m by 2039.

Comparison Capacity Summary

- 7.37 As with our convenience goods assessment, we would stress that these figures should be considered in context.
- 7.38 It is evident that macro-economic conditions in general, and retail trends towards online shopping, have re-shaped the viability of the sector. As a result, our forecasts do not identify any capacity for new comparison goods floorspace over the next decade to 2031.
- 7.39 Notably, almost all of the identified capacity for new comparison goods floorspace is derived from our calculations of inflow from residents outside of Wealden, and the Council may not see this as a 'need' to be met through specific allocations for new comparison goods floorspace without further justification.

Need for Additional Leisure Facilities

- 7.40 Chapter 6 included an assessment of the NEMS household telephone survey findings on participation and visitation rates for various leisure facilities, in addition to identifying the most popular locations for leisure trips by those questioned.
- 7.41 Building on this initial overview of the market, the modelling of future commercial leisure needs differs from the approach used to estimate retail need, to reflect the fact that the leisure spending is often less routine and trips to facilities can be spread across a number of different locations for each household, often influenced by cultural shifts and technological advances. This has resulted in the significant reduction in participation rates for bingo and bowling alleys, whilst participation rates for cinemas have also gradually fallen over the last decade as home streaming services have entered the mainstream (not accounting for any reductions associated with Covid-19 lockdowns).
- 7.42 We therefore adopt an industry standard approach to appraising the proportion of residents spending at leisure facilities across the District, and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.
- 7.43 Before undertaking the benchmarking analysis, we first consider Questions 42 and 43 of the household survey, which asked 'intention' or 'self-prediction' questions for residents of the Study Area to identify what leisure and community facilities or businesses they would like to see more of.

- 7.44 Whilst there are potential flaws in the nature of these 'intention' questions, which may not accurately reflect future behaviours, they are nonetheless a useful tool for understanding the perception of weaknesses in the provision of leisure and community facilities across an area. It should also be noted that residents do not often consider boundaries between authority areas and as such, would not necessarily be referring to a lack of facilities in Wealden alone.
- 7.45 Over half of respondents across the Study Area (58.6%) did not identify any leisure facilities, which they wished to see more of, and over three quarters (84.2%) did not have any suggestions for additional cultural facilities. Such responses are typical of our surveys across the UK.
- 7.46 In Figures 36 and 37 below, we isolate the responses in order to identify the main requests for new facilities and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed.

Figure 36. Leisure Facilities residents wish to see more of (%)

Facilities	Study Area Desires (%)
None	49.9%
Don't know	8.6%
Swimming pool	9.0%
Restaurants	8.4%
More children's facilities / activities	7.4%
Bars/Pubs	7.2%
Cinema	6.8%
Better shopping facilities	4.4%
Leisure Centre	4.2%
Bowling Alley	3.8%
Play Spaces/Park Facilities	3.2%

Source: Q42, Appendix C

Figure 37. Community Facilities and Businesses residents wish to see more of (%)

Facilities	Study Area Desires (%)
None	70.8%
Don't know	13.4%
Hotels	6.2%
Tourist Attractions	5.4%
Cultural Centres	5.3%
Religious Institutions	1.2%
Youth centre / more for younger people to do	1.1%
Doctors Surgery	0.5%
Other	0.5%

Source: Q43, Appendix C

- 7.47 There were modest requests for a swimming pool (9.0% of the 1,000 survey respondents) and

more hotels (6.2%) as the two largest responses, respectively. We would consider that this points towards a general satisfaction with local provision, but note that there is a degree of latent local demand for these specific facilities.

- 7.48 That does not mean though, that qualitative or quantitative improvements might be welcome, or required over time due to a growing population, and we examine below the capacity that might be needed towards the end of the Study period at 2039.

Capacity for Additional Leisure Facilities

- 7.49 Having identified participation rates, as well as the most visited facilities and examined the responses requesting new facilities from the District's residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the likelihood that the population could support the provision of new facilities.
- 7.50 The findings of the NEMS household survey allow us to assess market shares within the District for a variety of leisure sectors, as summarised in Chapter 6. We have gone on to apply an industry standard 'benchmarking' exercise by referencing the estimated increases in the District population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities. It is worth noting that the Council has also commissioned an Indoor Built Facilities Study, which will provide a more granular assessment of the need for such facilities across the District. Our benchmarking assessment has been undertaken to establish the likely support for various leisure facilities in the context of the wider Town Centre Study.

Health and Fitness Capacity

- 7.51 The Leisure Database Company⁶¹ (May 2019) identify that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym.

⁶¹ State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

- 7.52 In 2019, there were in the region of 7,239 health and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low-cost gyms, which account for over 35% of memberships in the private sector.
- 7.53 In 2016, Statista⁶² reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club.
- 7.54 Our survey results showed there to be four large publicly owned leisure centres within Wealden District at Hailsham (Freedom Leisure), Heathfield Leisure Centre, Uckfield Leisure Centre and Crowborough Leisure Centre. There are also a number of commercial gymnasiums and health clubs at Cross in Hand (Isenhurst Health Club), Uckfield (Anytime Fitness and Isenhurst Health Club) and Wadhurst (Uplands Sports Centre). Beyond that, provision is made up of a number of smaller facilities across the District that attract a smaller market share from the resident population (e.g. village halls, hotels, sports clubs etc.). Whilst the most popular facilities for Wealden residents were unsurprisingly based in Wealden as set out in Chapter 6, it is also worth noting the availability of upmarket facilities (such as David Lloyd and Bannatyne Health Club in Eastbourne), as well as ancillary facilities at golf clubs (such as Chartham Park in East Grinstead) that are more likely to attract users further distances and across authority areas.
- 7.55 Building on this, our household survey results showed that approximately 30.9% of Study Area residents participate in health and fitness activities (Q33). Of those, the survey results suggest that around 50.4% of residents currently carry out their health & fitness activities within the District itself (Q34). We term this as the 'District attraction rate', and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the District over time.
- 7.56 Experian MMG3 data identifies that Wealden District has an estimated population of 165,237 at 2021, increasing to 187,913 by 2039.
- 7.57 Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate in Figure 38 below that the District's residents could support 5 to 6 health and fitness centres over the plan period.

Figure 38. Health and fitness centre capacity

⁶² [Statista. Average number of members per gym](#), February 2018

Year	District Population	Regular Participants @ 30.9%	District Attraction Rate @ 50.4%	Average Membership	No. of Clubs Supported
2021	165,237	51,058	25,733	5,250	4.9
2026	172,768	53,385	26,906	5,250	5.1
2031	179,345	55,418	27,930	5,250	5.3
2036	184,964	57,154	28,806	5,250	5.5
2040	187,913	58,065	29,265	5,250	5.6

Source: Typical population to support a health and fitness club derived from the Leisure Database Company Research (2019)

7.58 Comparing capacity to supply, we consider that there is only likely to be limited opportunity to expand supply over the plan period. It should also be noted that the benchmarking exercise is just one way of measuring the capacity for new facilities, and that the findings should be considered in the context of the Council's emerging Indoor Built Facilities Study, which will consider existing and future supply and demand for indoor services including sports halls, swimming pools and health and fitness facilities. Moreover, the qualitative results of our survey (Figure 36) did not point to any significant degree of concern over a perceived lack of health and fitness facilities in Wealden. Whilst 9.0% of respondents did request additional swimming pool facilities, there were no requests for health and fitness clubs, and only 4.2% of respondents mentioned leisure centres.

7.59 This does not necessary preclude the improvement or extension of existing facilities, and we recommend that the Council remains supportive of commercial competition in general and such schemes in suitable town centre locations, not least because of the health and well-being benefits for residents and the sustainability advantages of high-quality locally-accessible facilities.

Cinema Capacity

7.60 The District has two mainstream cinemas, providing a total of 4 screens (439 seats), at an average of 110 seats per screen:

- Pavilion Theatre & Cinema, Hailsham – one screen (203 seats)
- Picture House Cinema, Uckfield – three screens (236 seats)

7.61 The NEMS Household Survey outlines that cinemas across Wealden attract 29.8% of all cinema trips made by those residents surveyed in the Study Area (Q35). In the 2019 calendar year, the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person for the year. The Cinema Advertising Association identified 788 cinema facilities with 4,194 screens in the UK and Cinescope database identified approximately 800,000

cinema seats in the UK. In 2016 (the most recently available public data) the UK yearly average was 40,000 cinema trips per screen.

- 7.62 As shown in Figure 39 below, in order to gauge the number of cinema screens that can be supported in the District over the plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person). We also account for the District's current cinema trip attraction rate and assume that this will persist over the plan period (i.e. 29.8% of all cinema trips). Our benchmarking exercise suggests that the current provision of four screens is adequate to serve the needs of the resident population to the end of the study period.

Figure 39. Cinema screen capacity

Year	District Population	No. of Cinema Visits Per Person	Total Cinema Attendance	District Attraction Rate @ 29.8%	Trips per Screen	Cinema Screens Supported
2021	165,237	2.7	446,140	132,950	40,000	3.3
2026	172,768	2.7	466,474	139,009	40,000	3.5
2031	179,345	2.7	484,232	144,301	40,000	3.6
2036	184,964	2.7	499,403	148,822	40,000	3.7
2039	187,913	2.7	507,365	151,195	40,000	3.8

Source: Nexus analysis

- 7.63 We are mindful though that screens in the District are below the UK average size in terms of seat numbers – 110 seats in Wealden, as opposed to 205 across the UK⁶³. As such, should a new cinema operator express an interest in a suitable town centre location, the Council may wish to consider the potential to attract residents from beyond their own boundaries (and to 'claw-back' residents who currently travel beyond Wealden for cinema trips) when assessing the suitability of such uses. Nonetheless, coupled with our qualitative findings, we would not recommend the Council actively seek a further major cinema facility in the District.

Ten-Pin Bowling Capacity

- 7.64 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes⁶⁴, a decrease since 2011 where 5,773 bowling lanes were identified⁶⁵. Taking into account the UK population at the time this data was produced (64.6 million⁶⁶), this equates to one lane for every 11,500 persons. There is one ten-pin bowling facility in Wealden District, the 8-lane

⁶³ Approximately 205 as per UK Cinema Association Findings, 2019

⁶⁴ Ten-pin Bowling – UK' Mintel, May 2014

⁶⁵ 'Ten-pin Bowling – UK', Mintel, November 2011

⁶⁶ As identified by the Office for National Statistics' Population Estimates for the UK 2014

bowling alley at Freedom Leisure Centre in Hailsham with Study Area residents predominantly travelling to facilities in other authority areas, as summarised in Chapter 6. The District attraction rate for Study Area residents' trips to ten-pin bowling facilities has been taken into account (13.6% of all trips) in order to calculate the number of additional lanes that could be supported in the District.

Figure 40. Ten-Pin bowling capacity

Year	District Population	District Attraction Rate @ 13.6%	Typical Population Required to Support a Ten-Pin Bowling Lane	No. of Lanes Supported
2021	165,237	22,472	11,500	2.0
2026	172,768	23,496	11,500	2.0
2031	179,345	24,391	11,500	2.1
2036	184,964	25,155	11,500	2.2
2039	187,913	25,556	11,500	2.2

Source: Nexus analysis

- 7.65 Figure 40 above indicates that, based on the assumed benchmark, the District's population supports just two lanes, rising to 2.2 lanes in 2039. On this basis, the current level of provision is sufficient for the plan period given the limited interest in such facilities. This should not necessarily discount extensions or developments of new facilities, but suggests that there is not a pressing need that would justify a specific allocation.

Restaurants, Pubs, Bars and Café Capacity

- 7.66 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the District, utilising current market shares as identified through the household survey, population and spending growth rates and benchmarking against current levels of provision.
- 7.67 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the study period to 2039. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 7.68 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £1,572 per annum for residents in the District (2019 prices). Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 18, Figure 1a⁶⁷), we calculate in Figure 41 a total spend across the District of £259.7m at

⁶⁷ Note that this accounts for a substantial short-term decline in leisure spending as a result of the Covid-19 pandemic

2021, increasing to £356.8m by 2039.

7.69 This spending is then attributed to the restaurant, café and bar facilities across the District. The household survey results (Q36 and Q37) showed that restaurants, cafés etc. in Wealden attracted 37.3% of total food spending, whilst the District's pubs and bars attracted 44.8% of beverage spending. Accordingly, it is reasonable to assume that around 40% of all food and beverage spending by residents is currently spent in the District itself.

7.70 Growing the 'benchmark' turnover of facilities from current levels on the basis of 1% per annum⁶⁸ to account for growth through extensions and trading efficiencies over the plan period, we find the anticipated spending surplus (or deficit) are as follows.

⁶⁸ We are not aware of any published data for restaurant, pub, bar and café sales efficiency growth and so have assumed a figure of 1%.

Figure 41. Restaurants, Pubs, Bars and Café Spending

Year	District Population	Spend Per Capita	Total Spend (£m)	Retention Rate @ 40%	Growth in Spending (£m)	Benchmark Turnover (£m)	Benchmark Growth (£m)	Residual Spending (£m)
2021	165,237	£1,572	£259.7m	£103.9m	-	£103.9	-	-
2026	172,768	£1,652	£285.4m	£114.2m	£10.3	£109.2	£5.3	£5.0
2031	179,345	£1,736	£311.4m	£124.6m	£20.7	£114.8	£10.9	£9.8
2036	184,964	£1,825	£337.5m	£135.0m	£31.1	£120.6	£16.7	£14.4
2039	187,913	£1,899	£356.8m	£142.7m	£38.8	£125.5	£21.6	£17.2

Source: Nexus analysis

Figure 42. Restaurants, Pubs, Bars and Café Capacity

Year	Residual Spending	Sales Density	Floorspace (sq m)
2026	£5.0m	£5,255	900
2031	£9.8m	£5,523	1,800
2036	£14.4m	£5,805	2,500
2039	£17.2m	£6,041	2,900

Source: Nexus analysis

- 7.71 We find a total food and beverage spending surplus across Wealden District of £17.2m by 2039. Adopting an average sales density of £5,000 per sq m at 2021 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant, pub and café floorspace that could be supported by the identified surplus expenditure. This is shown as being up to 2,900 sq m by 2039. This should be treated only as a rough guide.
- 7.72 We are also highly cognisant of the fact that the recent Covid-19 pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the District, increasing the availability of town centre opportunities. Whilst our figures show that there is likely to be capacity for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be considered in the first instance, in accordance with the sequential test.

Other Leisure Uses

- 7.73 Turning to cultural uses (primarily comprised of theatres / museums / art galleries), the Hailsham Pavilion Theatre is the most prominent town centre based facility within Wealden, whilst Uckfield also hosts a variety of cultural events and exhibitions within the medieval Bridge Cottage heritage Centre. The District also features a number of rural attractions including Knockhatch Adventure Park, Sheffield Park, the Seven Sisters chalk coastline at Birling Gap and links to Sir Arthur Conan Doyle at Crowborough and AA Milne (as well as Winnie the Pooh) in Ashdown Forest.
- 7.74 The NEMS household survey suggested that the majority of residents looked towards either

London (43.2% of trips) or Eastbourne (11.6%) for their cultural activities. This is not surprising due to their relative proximity, as well as the relatively low-level of mainstream cultural provision in Wealden.

- 7.75 Notwithstanding this, the survey established that a small proportion of respondents would like to see new facilities in Wealden, with a combined 10.7% of respondents suggesting that they would like to see additional tourist attractions or cultural facilities come forward in the future. Cultural facilities tend to either be market-driven, or publically funded as part of a wider strategy that recognises the wider community benefits and local draws that such facilities can offer as summarised at paragraph 4.25 of this report.
- 7.76 Whilst our findings alone would not lead us to recommend that the Council specifically allocates any specific sites to meet any perceived need for a new cultural facility, the Council may wish to consider market testing the potential for such facilities in the future.

Leisure Capacity Summary

- 7.77 The above findings present the quantitative and qualitative capacity for new leisure development in Wealden District. However, as we noted earlier in this Study, leisure spending is not undertaken as consistently as retail spending (in terms of both the frequency of spending and the breadth of locations) and residents will often visit a variety of different facilities depending on a number of factors.
- 7.78 Nevertheless, on the basis of current economic spending forecasts, our benchmarking assessment does not identify any significant gaps in the provision of existing facilities. The provision of leisure facilities within the District is seemingly in line with resident expectations and viable operating capacities. However, the Council's emerging Indoor Built Facilities Study will provide further consideration of specific supply and demand characteristics across the local area for sports halls, swimming pools and health and fitness facilities.
- 7.79 Whilst the potential for additional capacity is shown to exist in terms of restaurants, bars and cafés, the presence of a number of popular destinations across Wealden and the potential to re-occupy floorspace vacated during the Covid-19 pandemic, is likely to satisfy demand.

8 Town Centre Health Check Assessments

- 8.1 This chapter of the report sets out our health check assessment to assess the vitality and viability of Wealden's Centres including: Hailsham, Uckfield, Crowborough District Centres and the Service Centres of Heathfield, Polegate, Wadhurst and Forest Row as defined in the Council's adopted statutory development plan.
- 8.2 The health check assessments of the centres have been determined by the extent of Experian Goad Plans (where available), in order to provide consistency and allow for comparison against national averages and the findings of the previous Wealden Retail and Town Centre Study (2016). Where Goad Plans are not available, the Council's base mapping has been used. Full sized composition plans are contained at Appendix E.

Methodology

- 8.3 This town centre assessment builds on the analysis of market trends as outlined in Chapter 4. We supplement this analysis with two sources of new empirical evidence; consultation and stakeholder engagement, and our town centre health checks. By combining the findings of our engagement with local groups, residents and businesses, and our on-the-ground observations, we are able to build a picture of the current health of the centres, based on performance against the range of health check indicators set out in the NPPF / PPG.
- 8.4 We describe our methodology for the health check exercise below, before going on to examine each of the District and Service Centres in Wealden. We utilise the categorisations employed by Experian. These are mostly commonplace, but for the avoidance of doubt, 'Retail Services' include the likes of dry cleaners, health & beauty, opticians and travel agents, whilst 'Leisure Services' include bars, cafes, fast-food, nightclubs and cinemas.
- 8.5 Nexus carried out the town centre health check survey exercises in June 2021, which were completed after the resumption of trading for retail stores following the third Covid-19 'lockdown' and the resumption of in-store trading from April 2021, and trading for the hospitality industry in May 2021.
- 8.6 Health checks are both a physical exercise in walking the town centres to understand their make-up, constraints, and opportunities, as well as an exercise in understanding the views of local stakeholders.

8.7 While the NPPF does not provide a precise list of criteria to be used to assess the health of a centre, the Government's 'Town Centres and Retail' National Planning Practice Guidance (PPG) of March 2014, updated in September 2020, offers a helpful set of indicators. The PPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time:

- **Diversity of Uses** | Data on the diversity of uses in Wealden's centres was collated during the health check completed by Nexus in June 2021. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** | Vacant properties were also identified during the 2021 health check. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some churn is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor.
- **Commercial Yields on Non-Domestic Property** | Whilst this can be an indicator of town centre performance over time, data on commercial yields for Wealden's centres is not publically available at this time, as it is now only produced by ONS for major cities. Commercial rents (as considered in detail in Chapter 9: Property Market Assessment and Town Centre Strategies) provide a suitable alternative indication of the relative attractiveness of the area.
- **Customers' Views and Behaviour** | Information on customers' views is based on a combination of the results of a series of consultation and engagement exercises including targeted stakeholder workshops, and household/in-centre survey data. These results provide an indication of how a centre is both used and viewed by local residents, businesses and visitors. Importantly, and as described at Chapter 6, the household survey undertaken by NEMS represents a demographically accurate sample of the population. Conversely, the in-centre surveys, also undertaken by NEMS, do not seek to provide a representative sample, but instead provide a snapshot of the views and experiences of those visiting the centre at the time the surveys were carried out. While the results are valuable in providing an analysis of those experiences, the in-centre survey results

referenced in the following section should be considered as indicative only. The full household survey results are contained at **Appendix B**, while the complete in-centre survey results are contained at **Appendix C**.

- **Retailer Representation and Intentions to Change Representation** | Information on the current strength of centres and retailer representation have been derived from Experian Goad Category Reports and other published sources.
- **Commercial Rents** | An examination of average prime rents to facilitate an understanding of shopping rents and investment yields, as previously reviewed.
- **Pedestrian Flows** | General footfall and pedestrian flows were observed by Nexus during site visits to the Centres. Nexus was able to obtain a comprehensive understanding of pedestrian flows through observation at varying times.
- **Accessibility** | Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities. The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means including pedestrians, cyclists and disabled people.
- **Perceptions of Safety and Occurrence of Crime** | General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data.
- **State of Town Centre Environmental Quality** | Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus' site visits to the centres.
- **Balance between independent and multiple stores** | Consideration of the balance of retailer representation was informed by Nexus' site visits to the centres, as well as Goad mapping.
- **Barriers to Entry** | Consideration of the extent to which there is evidence of barriers to new businesses opening and existing businesses expanding. Attention was given to the length of unit vacancies as per Goad Reports, as well as the size of units available to let, and insights provided through engagement with relevant stakeholders operating businesses within the centres.

- **Opening Hours / Availability / Evening Economy** | General understanding of the night time economy was informed by Nexus' site visits to the centres, stakeholder engagement, and a desktop review of various local businesses' opening hours.

Uckfield District Centre

Description

- 8.8 Uckfield is one of the primary retail and leisure destinations in the District, providing a range of services and amenities that are not widely available within the smaller settlements.
- 8.9 The centre is broadly linear in nature, running the length of the High Street, with the Bell Walk shopping centre towards the southern end of the centre leading to the Bell Lane Industrial Estate, which comprises of several bulky goods units. The centre's anchor Tesco store can be accessed via Bellfarm Lane and sits to the west of High Street, while Waitrose is located on the east side of the High Street. Figures 43-44 provide some photographs of the centre.
- 8.10 Uckfield was classed as a 'District Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 43. View east from High Street towards Grange Road



Figure 44. Retail units in the Bellbrook Retail Park



Figure 45. Retail units northern end of High Street



Overall Composition

- 8.11 Figure 46 provides an overview of Uckfield's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to previous health checks carried out in July 2015. Figure 47 provides the composition map. A full sized composition plan with details on individual occupiers can be viewed at **Appendix E**.

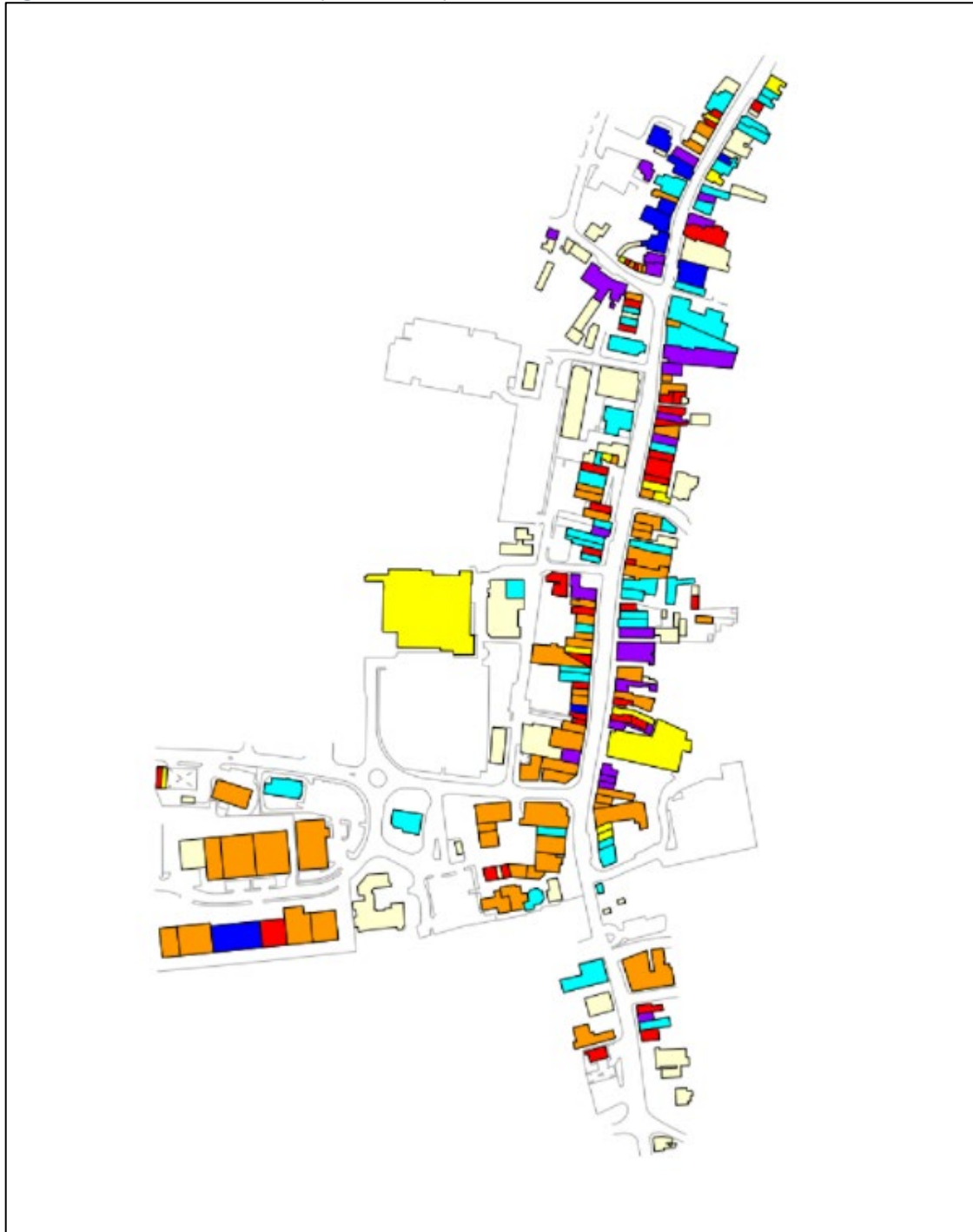
Figure 46. Uckfield Town Centre Composition

Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun-21 Units (#)	Jun-21 Units (%)	Jun-21 Fl'rspace (%)	UK Average Jun-21 Units (%)	UK Average Jun-21 Fl'rspace (%)
Convenience	11	5.5	17	8.8	17.3	8.3	15.3
Comparison	63	36.5	63	32.6	33.8	29.1	33.4
Retail Services	36	19.9	37	19.2	18.8	16.2	7.1
Leisure Services	36	19.3	39	20.2	14.0	24.7	25.7
Fin. / Bus. Services	21	10.7	26	13.5	9.9	8.7	7.3
Vacant	9	7.2	11	5.7	6.2	12.0	10.7
Total	175	100	193	100	100	100	100

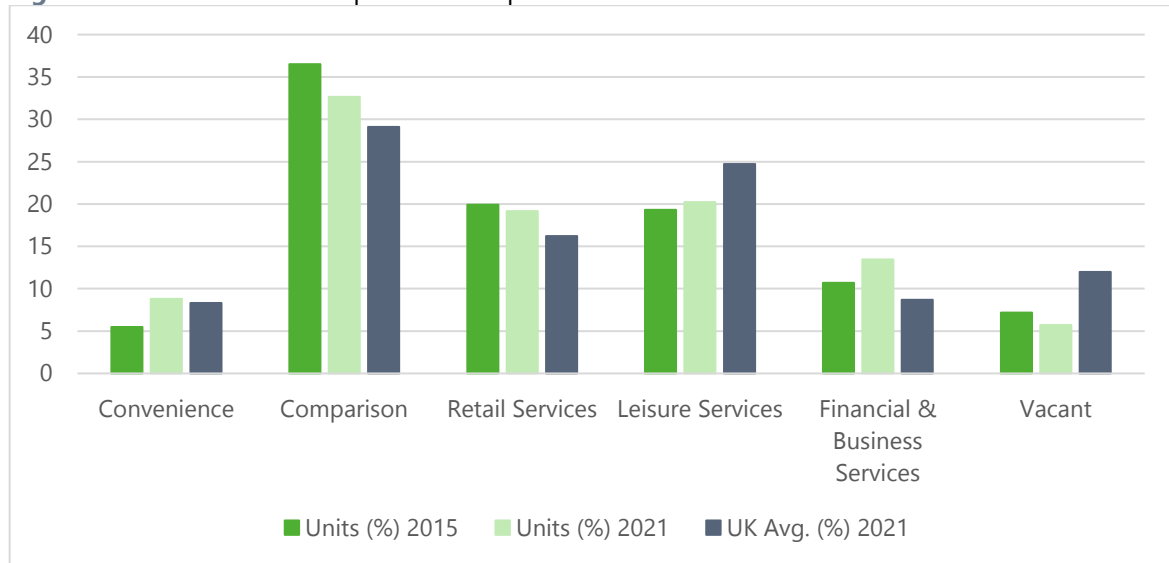
Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

- 8.12 Uckfield is the largest centre in the District comprising of 193 units. The centre has a good mix of uses with similar proportions of convenience, comparison, retail, financial and business services to UK averages.
- 8.13 The centre largely comprises independent retailers with a limited number of national multiples including Boots, WHSmith, Peacocks, Millets and Superdrug. The centre lacks strong comparison anchors, and fashion retailers, which is not unexpected given Uckfield's proximity to Royal Tunbridge Wells, Lewes, Eastbourne and Brighton. The centre has a low proportion of vacant units compared to the UK average, which points to the vitality of Uckfield.

Figure 47. Uckfield Composition Map



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

Figure 48. Centre composition comparison chart

8.14 The remainder of the health check indicators for Uckfield are set out below.

Health Check Indicator	Summary
Convenience	The centre is slightly above the UK average of 8.3%, with 8.8% of the units in convenience use. The centre also has a higher proportion of convenience floorspace (17.3%) compared to the UK average of 15.3%. Qualitatively, the centre has a wide range of convenience units including butchers, fishmongers, and health food shops. The majority of these units are independent stores. The centre also features major retailers with Tesco and Waitrose as anchor stores. It was noted that the Tesco store was disjointed from the rest of the centre and the pedestrian route back to the High Street not conducive to linked shopping trips.
Comparison	Despite lacking strong comparison goods anchors, comparison units account for the largest proportion of the stores within Uckfield, with 63 units (32.6%), which exceeds the UK average of 29.1%. However, the centre has seen a decrease in the number of comparison retailers since 2015, when they accounted for 36.5% of the centre. The proportion of comparison floorspace in the centre is 33.8%, which is a comparable to the UK average of 33.4%. The centre comprises largely of independent stores with limited national comparison retailers, including Boots, Superdrug, Millets, Peacocks and WHSmith. The lack of fashion multiples is expected

Health Check Indicator	Summary
	when considering the centre's proximity to larger centres including Royal Tunbridge Wells, Lewes, Eastbourne and Brighton. The centre features a range of different comparison units, including furniture shops, jewellers and sports goods. As part of the in-centre surveys undertaken by NEMS, participants were asked 'what kind of changes would you like to see to shops or markets?' The most common responses were 'more shops selling clothing or footwear' (38 responses) and 'more or new national retailers' (24 responses).
Services	The services (retail, leisure, financial and business services) have remained broadly the same in presence since 2015, with the exception of financial and business services, which has increased by 2.8%. Overall, services account for 52.9% of units within the centre, compared to 49.9% in 2015. Since 2015, when the previous survey was carried out, retail service units have seen a marginal decrease of 0.7 percentage points to 19.2%, whilst comprising 18.8% of the floorspace within the centre. Both the percentage of units and floorspace are in excess of the UK average, which stands at 16.2% (units) and 7.1% (floorspace). A high proportion of the retail services provide 'Health and Beauty' services, which account for 56.7% of all the retail service providers in the centre. Leisure service units have seen a moderate increase of 0.9 percentage points to 20.2%, compared to 19.3% of units in 2015. Despite the slight rise in leisure services, the centre still features a lower proportion of leisure units compared to the UK average of 24.7%. The leisure services currently present in the centre are predominantly cafes and takeaway units. Uckfield's evening economy is underpinned by a cinema and nightclub. However, other evening leisure activities are somewhat limited in terms of restaurants and public houses. When respondents were asked in the NEMS in-centre survey what kind of changes they would like to see to places to eat and drink, the most common responses 'better range of restaurants or cafes' (11), 'better range of pubs and bars' (6), and 'more opportunities to eat or drink outside' (5). Financial and business services account for 13.5% of the centre's units and 9.9% of the floorspace. These figures are above the UK

Health Check Indicator	Summary
	average of 8.7% of units and 7.3% floorspace. The centre's offer includes a wide range of banking options, as well as a notable number of estate agents, which specifically account for 46.7% of the financial and business services.
Vacancies	At the time of the site visits in June 2021, there were 11 vacant units (5.7%), a significantly lower proportion than the UK average (12.0%), which demonstrates the success of the large number of independent retailers and services available in the centre. The majority of the vacant units were located at the northern end of the High Street and a distance away from the retail anchors of Tesco and Waitrose that are located at the southern end of the High Street.
Markets	There is a farmers' market held in Luxfords Car Park on the first Saturday of every month.
Pedestrian Flows	During the site visits, high pedestrian flows were observed throughout the centre. This was particularly noticeable given the ongoing social distancing rules at the time. The south of the centre towards Bell Lane was observed to be noticeably busier. A pedestrian count on the west side of the High Street near Grange Road was undertaken and noted 64 passers-by in a 20 minute period, accounting for a steady flow.
Accessibility	Uckfield Train Station is located in the centre of the town, and offers direct services to London Bridge via East Croydon. The station is served by Southern. A bus station is located in close proximity to the train station and includes a number of regional bus routes including to Brighton, Royal Tunbridge Wells, Haywards Heath and East Grinstead. It also serves as a hub for surrounding towns and villages. There is a good provision of car parking in Uckfield. Car parking is free, with the exception of the car park at the rail station. Available spaces include: • Regency Close North – 16 spaces • Regency Close South – 22 spaces • Luxford Fields – 295 spaces • Bell Walk – 81 spaces • Uckfield Station – 171 spaces (£4.50 for 2 hours)

Health Check Indicator	Summary
	Tesco and Waitrose also have car parking available for its customers (260 and 118 spaces respectively). Heavy congestion was witnessed at the junction of High Street and Bell Lane at the time of the Nexus site visits. Limited cycle parking was observe along the High Street. The in-centre survey carried out in Uckfield found that 67 of the 100 respondents travelled to the centre by private vehicle as either the driver or a passenger, while 29 of the participants walked to the centre. The results of the household survey had a higher proportion of people travelling by private vehicle (> 80%), and just under 13% who had walked to the centre.
Perception of Safety	The centre was relatively busy at the time of the site visit, providing significant natural surveillance across the centre. Stakeholders also identified that formal CCTV has been an important deterrent for petty crime and anti-social behaviour. The perception of crime in Uckfield was low.
Opening Hours and the Evening Economy	Uckfield benefits from a cinema and associated bar/restaurant to the northern end of the centre. The Broadway nightclub is also located nearby. Other evening economy activities include some restaurants and public houses. When asked how they would rate the evening and night time economy in Uckfield, only 2.8% of respondents to the NEMS Household Survey stated 'plentiful', while 20.8% stated 'good', 25.4% stated 'average' and 19.9% stated either 'poor' or 'severely lacking'.
Environmental Quality and Public Realm	Uckfield is a pleasant centre, which appears to be well maintained and there was no litter evident at the time of the site visits. Hanging baskets, some public art to the south of the centre and heritage signage were visible. Attractive shopfronts and buildings were noted throughout the visit, in particular the Picture House and the historic Bridge Cottage Heritage Centre (which is open part-time, but hosts a number of cultural events and exhibitions). In contrast, a number of buildings of poor architectural quality were also noted and some parts of the town centre would benefit from improvements to increase the attractiveness particularly on the edges of the centre. A more consistent approach to shop frontages would be beneficial

Health Check Indicator	Summary
	throughout the centre, as would more vegetation and planting. The street furniture was largely uncluttered and the pavements were in relatively good condition.
Barriers to Entry	The majority of the centre is designated as a conservation area (the existing boundaries of the conservation area were designated in 2017) and includes a number of listed buildings. Therefore, a potential barrier to entry for new businesses could be that alterations to buildings, shop frontages and advertisements would have to demonstrate no harmful impacts to the historic environment. There are few vacancies within the centre and these units are usually small in scale. This may deter some larger retailers coming into Uckfield Town Centre.
Customer Views & Behaviour	Key points raised during stakeholder consultation included: • Uckfield is a unique centre with a good range of independent stores; • Shared surfaces might create a nicer environment for pedestrians; • Good evening economy including the cinema, nightclub, public houses and restaurants; • Car charging points required; • Low vacancy rate within the centre, which is positive, but also a barrier for new traders; • Uckfield is perceived as safe with CCTV being a good deterrent. When respondents were asked what they currently disliked about Uckfield Town Centre, the most common responses from the NEMS in-centre survey (Appendix C) were 'poor range of shops' (26%), 'congestion' (21%) and 'too many of the same type of shop' (12%). When asked how the town centre could be improved, the most common responses from the in-centre survey were 'different or better shops or markets' (48%), 'different or better places to eat and drink' (17%) and 'nothing in particular' (17%). The household survey (Appendix B) reaffirmed these preferences, with the top three responses to what would encourage respondents to visit the centre more often being 'increased general choice and range of shops

Health Check Indicator	Summary
	(30.1%), 'improved non-food shops' (9.0%) and 'improved food shops' (5.9%).
Key Takeaways	In summary, the key takeaways from this health check assessment include: • The centre has a significantly lower number of vacant units (5.7%) compared to the UK average (12.0%), which is positive, particularly in light of the impact of the Covid-19 pandemic; • The Tesco store is separated from the town centre to the west, potentially reducing the likelihood of linked trips, and could be better connected; • Availability of parking was found to be sufficient and easily accessible, with just shy of 1,000 parking spaces available in car parks within and around the centre; • Improvements to the public realm across the centre, including increasing the amount of planting and larger trees would make for a more pleasant environment for both traders and consumers. This is likely to assist both in increasing the amount of dwell time customers spend within the centre, and promoting potential investment; and • A shopfront strategy could be considered to assist in improving some poor quality shop frontages in the centre.

Hailsham District Centre

Description

- 8.15 Hailsham is a market town located six miles north of Eastbourne. The retail provision in the centre is primarily located along High Street, George Street and within the two shopping centres named The Quintin (anchored by Asda) and Vicarage Fields (anchored by Waitrose). The shopping centres are located on opposite sides of High Street in the heart of Hailsham. Figures 49-50 provide some photographs of the centre.
- 8.16 Hailsham is classed as a 'District Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 49. St Mary's Walk



Figure 50. The Homely Maid, High Street



Figure 51. Hailsham Street Market site

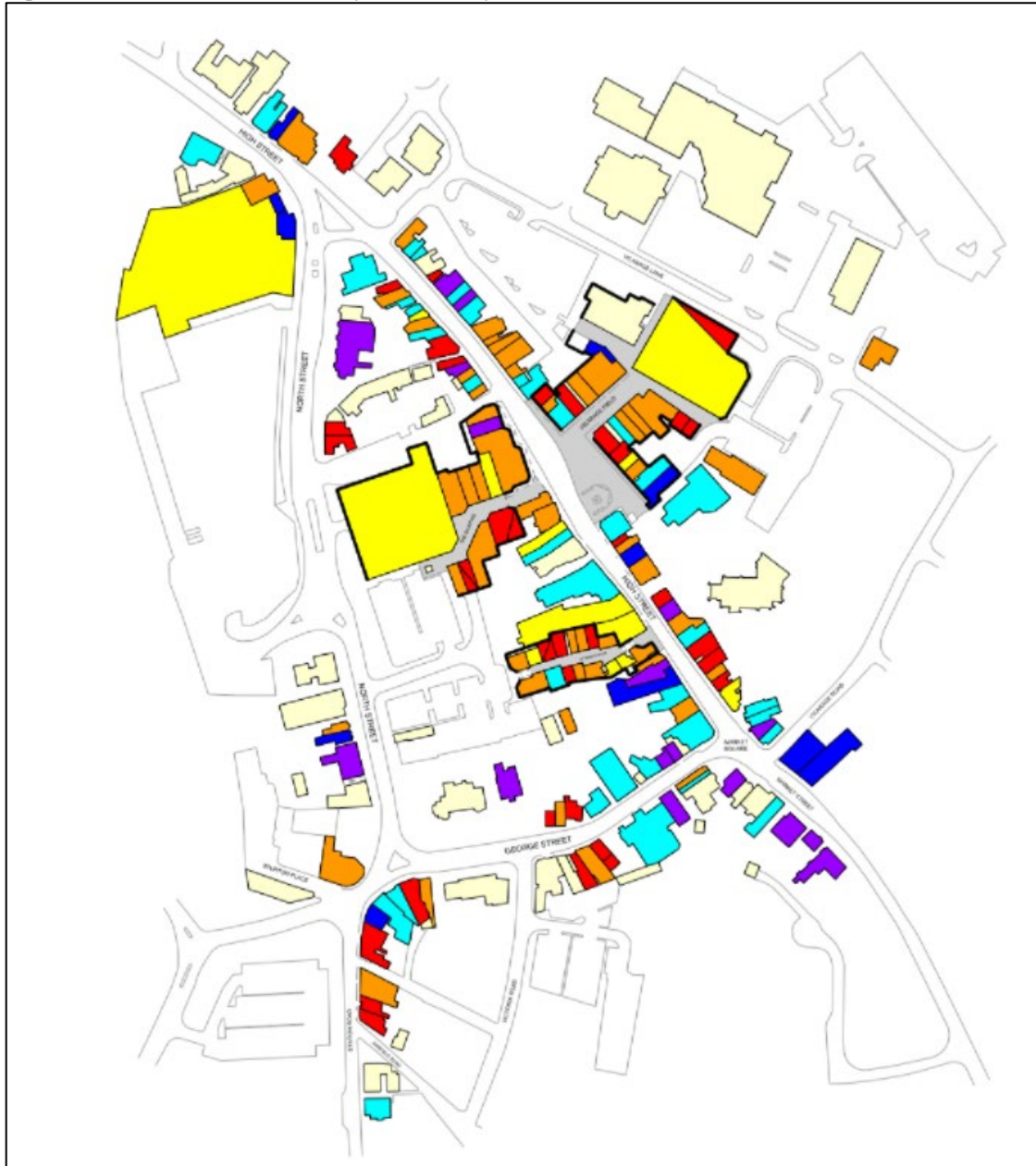
Overall Composition

- 8.17 Figure 52 provides an overview of Hailsham's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to the previous centre survey undertaken in July 2015. Figure 53 provides the composition map. A full sized composition plan can be viewed at **Appendix E**.

Figure 52. Hailsham District Centre Composition

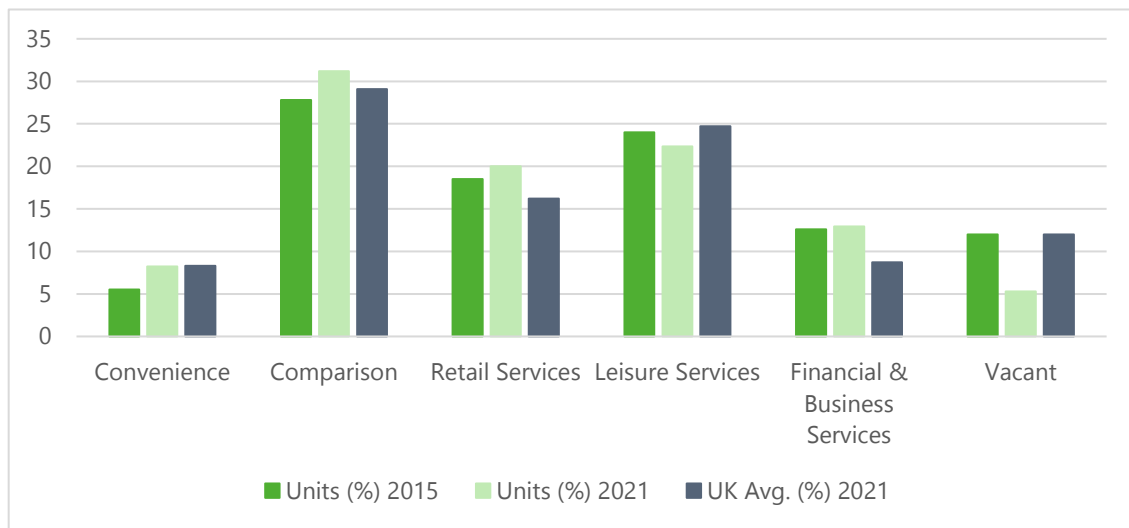
Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun-21 Units (#)	Jun-21 Units (%)	Jun-21 Fl'rspace (%)	UK Average Jun-21 Units (%)	UK Average Jun-21 Fl'rspace (%)
Convenience	10	5.5	14	8.2	31.8	8.3	15.3
Comparison	51	27.8	53	31.2	21.0	29.1	33.4
Retail Services	34	18.5	34	20.0	8.7	16.2	7.1
Leisure Services	44	24.0	38	22.4	25.2	24.7	25.7
Fin. / Bus. Services	23	12.6	22	12.9	9.7	8.7	7.3
Vacant	13	12.0	9	5.3	3.6	12	10.7
Total	183	100	170	100	100	100	100

Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 53. Hailsham Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

- 8.18 The centre is comprised of 170 units, and is the second largest centre in the District. The composition of Hailsham is broadly in line with UK averages, and serves the area well in terms of convenience stores and services. As with Uckfield, the centre largely comprises independent retailers with a limited number of national multiples including Boots, WH Smith and Superdrug. Retail services accounts for more than half the units in the centre. Figure 54 below provides a breakdown of the centre's composition compared to the previous survey undertaken in 2015 and the UK averages.

Figure 54. Centre Composition Comparison Chart

8.19 The remainder of the health check indicators for Hailsham Town Centre are set out below.

Health Check Indicator	Summary
Convenience	Hailsham has seen an increase in convenience units since 2015, from 5.5% (10 units) to 8.2% (14 units), an increase of 2.7 percentage points and is in line with the UK average of 8.3%. However, due to the large Asda, Tesco and Waitrose stores, the floorspace far exceeds the UK average of 15.3% at 31.8%, over the double the average. Further larger convenience units include Iceland and Costcutter, while other smaller, usually independent convenience units include a butcher, bakeries and health foodstores.
Comparison	The centre has also seen an increase in comparison units since 2015, at which point, there were 51 units (27.8%). In 2021, comparison units accounted for 53 units (31.2%), exceeding the UK average of 29.1%. The majority of the comparison retail units are independent retailers offering a range of goods. The comparison offer comprises a mix of charity shops, sports goods, chemists, carpet and flooring shops, as well as more specialist shops including bridal, antiques and a weapons store. However, the centre lacks fashion and footwear stores, and this was confirmed through the stakeholder consultation sessions.

Health Check Indicator	Summary
	The NEMS in-centre survey asked respondents 'what kind of changes would you like to see to shops or markets? The most common responses were 'more shops selling clothing/footwear' (34), 'more or new independent shops' (21) and 'better quality shops' (13), indicating a general dissatisfaction with the current provision of shops.
Services	Services account for 55.3% of units within Hailsham, which is higher than the UK average of 49.6%. The services provision for the centre remains broadly the same as 2015, when they accounted for 55.1% of the centre. Retail services make up 20.0% (34) of the units, higher than the UK average of 16.2%. The majority of the retail services are made up of the 'health and beauty sector', which accounts for 64.7% of the retail services. The number of leisure services within the centre has decreased since 2015, at 38 units (22.4%). This is lower than the UK average of 24.7%. The leisure services within the centre comprise cafes, fast food and takeaway restaurants, as well as sit-in restaurants, including a Prezzo in a converted church hall, public houses, hotels and the Hailsham Pavilion. Financial and business services have remained consistent since 2015, with the centre having 22 units compared to 23 units previously. The centre has a higher percentage of financial and business services compared to the UK average, or 12.9% compared with 8.7%. The financial and business services include estate agents, financial advisors and banks.
Vacancies	The number of vacant units within the centre has decreased by 6.7 percentage points since 2015 with a vacancy rate of only 5.3%. This is significantly lower than the UK average of 12.0% and is positive in terms of the vitality and viability of this centre. The vacancies are spread throughout the centre, and as a result, there are no particular areas of concern in Hailsham.
Markets	Hailsham Farmers' Markets are held on the second Saturday of every month at Hailsham Cattle Market. A street market is also held every Saturday at Vicarage Field.

Health Check Indicator	Summary
Pedestrian Flows	During the Nexus site visits it was identified that the pedestrian hotspots were broadly located in the centre of Hailsham outside the shopping centres. Pedestrian counts were undertaken outside each shopping centre for 20 minutes. During that time 172 passers-by were observed entering/leaving The Quintin centre, whilst 184 pedestrians were noted passing Vicarage Fields. Footfall was witnessed to be far less at Market Square and on George Street.
Accessibility	Hailsham District Centre does not benefit from a dedicated train station; the nearest station is in Polegate around 5km away. There is a good provision of car parking in Hailsham, which are free of charge. • Vicarage Field West – 90 spaces • Vicarage Lane – 286 spaces • Vicarage Field East – 94 spaces • Victoria Road – 92 spaces In addition to the locations mentioned above, the Asda supermarket has 180 spaces (estimated) and Tesco has 280 spaces of customer car parking available for use. The centre also benefits from bus services, connecting local residents to a number of locations including Uckfield, Polegate, Eastbourne, Brighton, Bexhill and Hastings. Heavy traffic was witnessed on North Street at the time of the site visit and car parks appeared to be well utilised. Limited cycle parking is available along the High Street. The results of the in-centre survey carried out in Hailsham found that 60 of the 100 respondents travelled to the centre by private vehicle as either the driver or a passenger, while a third of those asked (33) walked to the centre. The results of the household survey showed that a higher proportion of people questioned travelled by private vehicle as either the driver or passenger (72.6%), and just over 20% had walked to the centre.
Perception of Safety	The centre was relatively busy at the time of the site visits, providing significant natural surveillance across the centre. The perception of crime in Hailsham was low when the site visits were carried out and

Health Check Indicator	Summary
	crime was not identified as a significant issue during the stakeholder sessions.
Opening Hours and the Evening Economy	Evening economy uses include the Hailsham Pavilion Theatre with daily screenings/performances, public houses named The George and The Grenadier, and several restaurants including Prezzo and Rustico. A number of takeaways are also located in the centre. The supermarkets in the centre are all open beyond conventional opening hours of 9am - 5pm, with Waitrose open until 8pm, Asda open until 10pm and Tesco closing at midnight. When asked how they would rate the evening and night time economy in Hailsham, 23.4% of respondents who said they visited Hailsham the most often rated the evening economy as either 'plentiful' or 'good', 22.5 % rated it as 'average', and 17.9% rated it as either 'poor' or 'severely lacking'.
Environmental Quality and Public Realm	The centre does have some buildings of notable quality, including the Homely Maid and Hailsham Pavilion. However, in general we would consider the character of the centre to be in need of improvement. Both the shopping centres are dated and a large number of the shop fronts are of poor quality. In particular, the Poundland store does not provide an active frontage in a central area of the centre. In contrast, St Mary's Walk and its range of interesting independent shops in an attractive setting is a desirable part of the town to visit. The street furniture within the centre could be improved and hanging baskets hangers were left empty at the time of the visit. Some planting was evident, primarily outside the Vicarage Fields shopping centre, but could be further improved. Pavements were free from litter at the time of the visit.
Barriers to Entry	The centre does offer car parking, but lacks on street parking for short stay visits. The centre also has a lower vacancy level than the UK average meaning a lack of available opportunities. The majority of the centre is designated as a conservation area (last updated in 2017) and includes a number of listed buildings. As a result, this could potentially represent a barrier to entry for new businesses as any alterations to shopfronts and advertising would have to demonstrate no harmful impacts to the historic environment.

Health Check Indicator	Summary
Customer Views & Behaviour	Comments received during stakeholder consultation included: • Hailsham is currently dominated by large superstores and more artisan opportunities and fashionwear/shoe shops are needed; • Low vacancy rate within the centre; • Evening economy is currently limited, but has been improved with recent restaurant openings; • Better links between Hailsham, Uckfield, Polegate and Eastbourne would be advantageous; and • The public realm needs revitalisation. When visitors were asked what they currently disliked about Hailsham Town Centre, the most common responses from the NEMS in-centre survey (Appendix C) were 'poor range of shops' (8%), followed by the 'cleanliness of the centre' (5%) and 'poor range or quality of places to eat' (4%). Responses to 'how the centre could be improved' received by the in-centre survey were 'different or better shops or markets' (44%) and 'improved quality of cleanliness of public spaces' (8%). A further 22% stated 'nothing in particular' and (21%) stated 'don't know'. The top three responses to what would encourage respondents to visit the centre more often asked during the household survey (Appendix B) stated 'increased general choice and range of shops' (23.1%), 'improved non-food shops' (15%) and 'improved quality of shops' (9.9%).
Key Takeaways	Our key takeaways for Hailsham Town Centre include: • Convenience floorspace in the town centre significantly exceeds the UK average of 15.3% at 31.8%, over double the average. This is a result of large floorplate supermarkets, which are an important draw to Hailsham; • The number of vacant units within the centre is significantly lower than the UK average, a positive sign; • In some areas, the centre appears tired and outdated, and would benefit from public and urban realm

Health Check Indicator	Summary
	improvements. In turn, improvements to the public realm may assist in encouraging further investment; • The centre would benefit from an emphasis on independent and artisan units as the current convenience offer is dominated by large superstores.

Crowborough District Centre

Description

- 8.20 Crowborough is located to the north of the District and is only seven miles from Royal Tunbridge Wells. The centre provides a range of services and is surrounded by predominantly residential dwellings. The majority of the town centre uses are located along High Street, Croft Road and The Broadway. The centre features Morrisons, Waitrose, as well as a Lidl to the north of the centre. Figures 55-57 provide some photographs of the centre.
- 8.21 Crowborough is classed as a 'District Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 55. Spar, Croft Road



Figure 56. Entrance to the Fernbank Centre



Figure 57. Crowborough Cross Public House

Overall Composition

- 8.22 Figure 58 provides an overview of Crowborough's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to the previous health check carried out in July 2015. Figure 59 provides the composition map. A full sized composition plan can be viewed at **Appendix E**.

Figure 58. Crowborough District Centre Composition

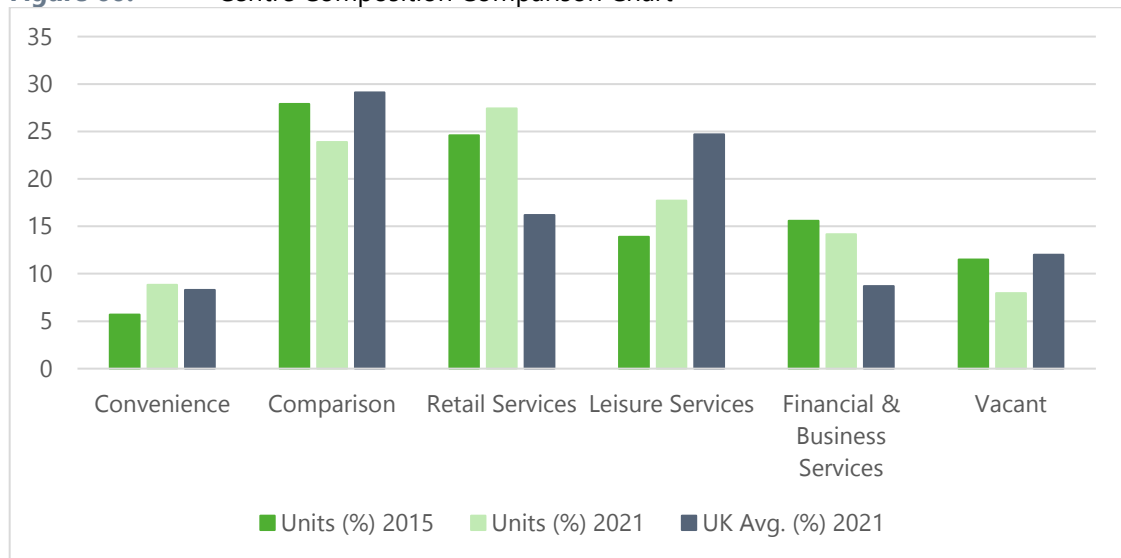
Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun-21 Units (#)	Jun-21 Units (%)	Jun-21 Fl'rspace (%)	UK Average Jun-21 Units (%)	UK Average Jun-21 Fl'rspace (%)
Convenience	7	5.7	10	8.8	37.4	8.3	15.3
Comparison	35	27.9	27	23.9	23.4	29.1	33.4
Retail Services	30	24.6	31	27.4	12.5	16.2	7.1
Leisure Services	19	13.9	20	17.7	14.8	24.7	25.7
Fin. / Bus. Services	17	15.6	16	14.2	8.3	8.7	7.3
Vacant	14	11.5	9	8.0	3.7	12	10.7
Total	122	100	113	100	100	100	100

Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 59. Crowborough Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

- 8.23 Crowborough is a District Centre comprising 113 units and is the third largest centre in the district after Uckfield and Hailsham. The centre is anchored by a Morrisons convenience store situated off the High Street. The convenience retail offer includes a Waitrose to the south of Crowborough centre and Lidl to the north west of the centre. Other national multiples include Boots, WHSmith and Costa. The town centre is linear in structure, primarily located along High Street, The Broadway and Croft Road. Figure 60 provides a breakdown of the centre's composition compared to the previous survey in 2015 and the UK averages.

Figure 60. Centre Composition Comparison Chart

8.24 The remainder of the health check indicators for Crowborough Town Centre are set out below.

Health Check Indicator	Summary
Convenience	There are 10 convenience units within Crowborough, making up 8.8% of all units, which is slightly higher than the UK average of 8.3%. The number of convenience units within the centre has risen by three units (3.1%) since 2015. The total amount of convenience floorspace (37.4%) is more than double the UK average (15.3%). The centre features three large national multiple foodstores: including Morrisons, Waitrose and Lidl. The centre also features an independent butcher, off-licence, and newsagent. The positioning of the Morrisons store was observed as being disjointed from the remainder of the centre in terms of accessibility from the High Street. When respondents were asked where they would undertake their food shopping in the NEMS in-centre survey, the most common responses were the Morrisons (52 responses), Waitrose (28 responses) and Tesco Superstore at Sybron Way, Jarvis Brook (13 responses).
Comparison	There are 27 comparison units within the centre, which makes up 23.9% of all units, lower than the UK average of 29.1%. The number of comparison units within the centre has fallen from 27.9% in 2015 to 23.9% in 2021. The amount of floorspace equates to 23.4%, which is significantly under the UK average of 33.4%. As such,

Health Check Indicator	Summary
	Crowborough now has a lower percentage of both comparison retail units and floorspace compared to the UK averages. The comparison retail units comprise largely of independent retailers, however, for a centre of its size and proximity to Royal Tunbridge Wells, it contains a good range of shops, including: florists, furniture shop, art gallery, chemists, charity shop, household goods and some fashion shops. The NEMS in-centre survey asked respondents 'what kind of changes would you like to see to shops or markets'? The most common responses were 'more or new independent shops (50.0%)', 'better quality shops' (34.8%) and 'more affordable shops' (13.0%).
Services	Overall, services equate to 49.6% of units within Crowborough. There are 31 retail units (27.4%), 20 leisure services (17.7%) and 16 financial and business services (14.2%) within the centre. Health and beauty services are the principal offer of retail services within the centre, with 19 units. Crowborough has a greater proportion of retail services (27.4%), compared to the UK average (16.2%). The centre also has a large proportion of retail service floorspace (12.5%), compared to the UK average (7.1%). The centre has a lower proportion of leisure services (17.7%) compared to the UK average (24.7%), although the number of leisure services has increased since the previous 2015 survey (13.9%). The offer includes the Crowborough Cross public house, two member's only social clubs, as well as a number of dine-in restaurants and takeaways. Financial and business services equate to 14.2% of the centre, which is significantly larger than the UK average (8.7%). Despite having a larger proportion than the UK average, the centre has seen a slight drop in the proportion of financial and business services since the 2015 survey (15.6%).
Vacancies	Crowborough has seen a reduction in vacant units (8.0%), compared to the previous 2015 survey (11.5%). The proportion of vacant units in the centre is below the UK average of 12%. The vacancies are spread throughout the centre, giving no particular areas of concern.

Health Check Indicator	Summary
Markets	Crowborough Town Centre hosts a farmers' market on the fourth Saturday of every month at the Crowborough & District Social Club.
Pedestrian Flows	During the Nexus site visits, it was observed that there was a consistent flow of footfall on the High Street (outside the Factory Store in particular) in both directions.
Accessibility	Crowborough does have a train station, although it is located some distance to the south of the centre (2 miles to the south east at Jarvis Brook). The train line connects Crowborough to East Croydon, London Bridge and Uckfield to the south. The centre is accessible by road on the A26, which links the town to Royal Tunbridge Wells and the south coast. Parking is available in the centre at: • New Road – 25 spaces • Croft Road – 342 spaces • Waitrose car park – 82 spaces • Morrisons – 250 spaces (estimated) • Lidl – 80 (estimated) Car parking is free throughout the centre, however, the Waitrose, Lidl and Morrisons car parks are for customers only. At the time of the Nexus site visits, the car parks had spaces available. A regular bus service passes through the town, linking it with local towns, the train station, as well as Brighton and Royal Tunbridge Wells. At the time of the visit, heavy traffic was noted to the north of the centre at The Cross. Following the in-centre survey carried out in Crowborough, the results found that 80 of the 100 respondents travelled to the centre by private vehicle as either the driver or a passenger, while far fewer of those asked (16) walked to the centre. The remaining respondents either cycled or caught the bus. The results of the household survey showed that a lesser proportion of the respondents travelled by private vehicle (70.3%), while over 25% had walked to the centre.

Health Check Indicator	Summary
Opening Hours and the Evening Economy	The centre has a public house, a bar and two members' only social clubs as well as restaurants catering for a number of cuisines. With the exception of the supermarkets, the remainder of the town maintains relatively traditional opening hours. When respondents were asked how they would rate the evening and night time economy in Crowborough, 24.6% of respondents who said they visited Crowborough the most often rated the evening economy as either 'plentiful' or 'good', 23.5% rated it as 'average', and 20.8% rated it as either 'poor' or 'severely lacking'.
Environmental Quality and Public Realm	Crowborough is an attractive centre; however, there was a noticeable lack of trees or green infrastructure throughout the High Street, largely due to the narrow pavements. Clokes Corner, to the north of the centre features a statue of Sir Arthur Conan Doyle, and while some planting was evident. Further improvements could be made to create a gateway to the centre. Similarly, the outside area at the Fernbank Centre could benefit from public realm improvements. Pavements along The Parade were found to be in a poor state of repair, although a lack of litter was noted during the time of the visit. The height and size of storefront fascia boards was relatively consistent throughout the centre and the condition of the shopfronts were relatively good.
Barriers to Entry	The lack of clear development sites, lack of available premises and cost of units are all considered to be factors that may reduce the potential for new traders to enter the centre.
Customer Views & Behaviour	Comments received during stakeholder consultation included: • There is a diverse selection of independent retailers, although a shortage of quality clothing shops; • Suggestion of introducing a one-way road system to provide more pedestrian space along the High Street; • Suggestion to replicate landscaping along Croft Road throughout the remainder of the centre, to create a nicer environment; • Evening economy within the centre considered to be diverse, including a good selection of restaurants;

Health Check Indicator	Summary
	• Low vacancy rate within the centre and generally vacant units are being snapped up quite quickly at the moment; • Improved public transport connection to the centre would be beneficial, as visitors generally rely on private vehicles to visit; and • Some concerns regarding incidences of anti-social behaviour, which needs to be resolved. When respondents were asked what they currently disliked about Crowborough District Centre, the most common responses to the NEMS in-centre survey (Appendix C) were 'poor range of shops' (20%), followed by the 'poor range of leisure facilities' (6%). The 'appearance of character of the centre' and 'poor range of services' each scored 5%. The most common responses to 'how the centre could be improved' for the in-centre survey were 'different or better shops or markets' (46%), 'different or better places to eat and drink' (13%) and 'different or better facilities' (15%). The answers 'nothing in particular' and 'don't know' jointly scored 34%. Similarly, the results of the household survey (Appendix B) agreed with these preferences, with the top three responses to what would encourage respondents to visit the centre more often being 'increased general choice and range of shops' (44.4%), 'improved non-food shops' (15.1%) and 'improved leisure facilities' (6.1%).
Key Takeaways	The key takeaways from the health check assessment of Crowborough Town Centre include: • The centre has a lower proportion of leisure services compared to the UK average; however, the restaurant provision was generally considered to be a strength of the centre by stakeholders, that should be fostered; • Crowborough has seen a reduction in vacant units since the last study was completed in 2015; • There is a disconnect between the Morrisons Supermarket and the rest of the centre; • Pavements are narrow throughout the centre, and particularly along the High Street, and cars travel

Health Check Indicator	Summary
	quickly along the High Street. This makes for a less enjoyable experience for pedestrians. Traffic calming measures may assist in reducing the speeds of motorists; • There are very few development opportunities identified in the centre; • While the town has a railway station, this is located at the edge of settlement, providing less opportunities for linked trips.

Heathfield Service Centre

Description

- 8.25 Heathfield is a market town situated in the centre of the District, to the south of Crowborough and to the east of Uckfield. In terms of number of units within the centre, it is comparable with Crowborough, with a total of 106 units surveyed. The majority of the units can be found along the High Street and Station Road. Figures 61-63 provide some photographs of the centre.
- 8.26 Heathfield is classed as a 'Service Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 61. View West along High Street



Figure 62. Public Realm on High Street



Figure 63. View west on High Street



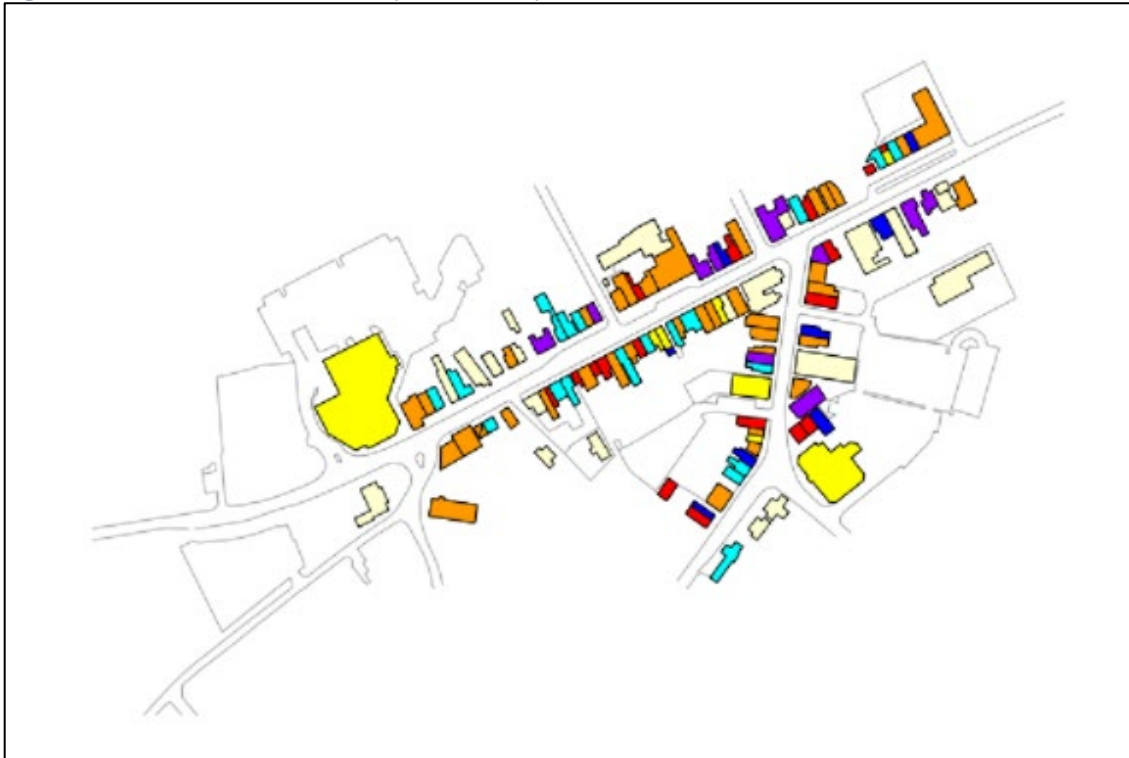
Overall Composition

8.27 Figure 64 provides an overview of Heathfield's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to previous health check undertaken in July 2015. Figure 65 provides the composition map. A full sized composition map can be viewed at **Appendix E**.

Figure 64. Heathfield Service Centre Composition

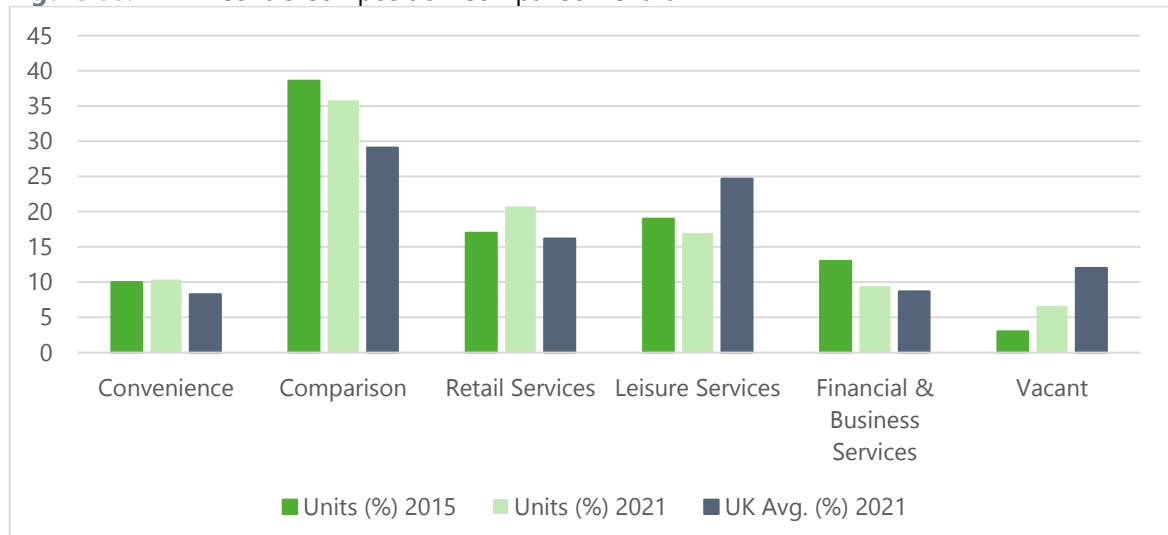
Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun-21 Units (#)	Jun-21 Units (%)	Jun-21 Fl'rspace (%)	UK Average Jun-21 Units (%)	UK Average Jun-21 Fl'rspace (%)
Convenience	10	10.0	11	10.4	30.2	8.3	15.3
Comparison	38	38.0	38	35.8	34.1	29.1	33.4
Retail Services	17	17.0	22	20.8	9.9	16.2	7.1
Leisure Services	19	19.0	18	17.0	12.4	24.7	25.7
Fin. / Bus. Services	13	13.0	10	9.4	9.6	8.7	7.3
Vacant	3	3.0	7	6.6	3.9	12	10.7
Total	100	100	106	100	100	100	100

Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 65. Heathfield Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

- 8.28 There are currently a range of retail units within Heathfield, the largest of which is the Co-operative foodstore to the west of the High Street. The centre includes a range of services, as well as independent stores that provide for the local population. Figure 66 provides a breakdown of the centre's composition compared to the previous survey undertaken in 2015 and the UK averages.

Figure 66. Centre Composition Comparison Chart

8.29 The remainder of the health check indicators for Heathfield Town Centre are assessed below.

Health Check Indicator	Summary
Convenience	The centre has 11 convenience retail units, which is 10.4% of the units within the centre and is above the UK average of 8.3%. However, the total amount of convenience floorspace (30.2%) is significantly higher than the UK average (15.3%) suggesting that these stores take up larger units within the centre. The convenience units comprise the Co-operative, Sainsbury's and a Tesco Express, as well as, a butcher, fishmonger, greengrocer, deli, bakery, health shop, tobacconist and off-licence. The NEMS in-centre survey asked participants where they would undertake their food shop. The most common responses were the Co-op (39.5%), Sainsbury's Superstore on Station Road (15.1%), online (12.8%) and Waitrose on Station Road (7.0%).
Comparison	There were 38 comparison retail units surveyed in Heathfield, accounting for 35.8% of all town centre units, which is higher than the UK average (29.1%). The centre has seen a slight drop in comparison stores since 2015, when comparison units accounted for 38.6% of the centre. Despite the similar level of comparison units to the UK average, smaller units mean that the centre has a broadly similar amount of floorspace (34.1%) when compared to the UK average (33.4%). The centre comprises primarily of independent retailers with a selection of charity shops, chemists, a florist, household goods and a card shop. More specialist shops are also located in Heathfield such as antiques, camping goods and interior decorators.
Services	The centre has seen a slight decrease in services (retail, leisure, financial and business services) since the 2015 Study. Retail services have risen from 17.0% in 2015, to 20.8% in 2021, which exceeds the UK average of 16.2%. Leisure services account for 17.0% of the units in Heathfield, which is below the UK average of 24.7%. In terms of floorspace, leisure services makes up only 12.4% of total floorspace across Heathfield, compared to the UK average of 25.7%. A lack of public houses and

Health Check Indicator	Summary
	dine-in restaurants means that there are less night-time economy opportunities within the centre. Financial and business services account for 9.4% of units in the centre, which is a slight increase since 2015 (13.0%). The existing proportion is slightly over the UK average (8.7%). Half of the financial and business services are estate agents, with five estate agents within the centre.
Vacancies	The centre has a lower proportion of vacant units (6.6%) compared to the UK average (12.0%). The centre has seen a slight increase in vacant units from 2015 (3.0%). There are no significant clusters of vacant units in the centre, which indicates the viability and vitality of this centre.
Markets	Heathfield farmers' Market takes place at the third Saturday of every month in the Co-Op car park.
Pedestrian Flows	At the time of the Nexus site visits, the pedestrian footfall within the town was relatively low.
Accessibility	There is no train station in Heathfield and the bus services are limited. There are three car parks located in the town centre, all of which are free: • Mill Road – 103 spaces; • Station Road West – 39 spaces; and • Station Road East – 95 spaces The Co-operative also has a car park for customers with a further 249 spaces. Some on street parking was available in the centre. At the time of the visits, car parking was available in the centre. There is very limited dedicated bicycle parking within the centre. When asked as part of the in-centre survey carried out in Heathfield, the results found that 72 of the 100 respondents travelled to the centre by private vehicle as either the driver or a passenger, while fewer of those asked (26) had walked to the centre and (2) via bus or coach. The results of the household survey showed that more

Health Check Indicator	Summary
	people questioned travelled by private vehicle (85.5%), and only 12.2% had stated they usually walked to the centre.
Perception of Safety	When Nexus visited Heathfield, it was observed that the High Street had good natural surveillance. However, a lack of evening economy could be detrimental to the perception of safety within the centre outside of core shopping hours.
Opening Hours and the Evening Economy	A high proportion of businesses were observed to be open between 9:00am-5.30pm, resulting in the centre not having an established evening economy. This is reflected in the centre having a lower proportion of leisure services than the UK average. When asked how they would rate the evening and night time economy in Heathfield, 8.4% of respondents who said they visited Heathfield the most often rated the evening economy as either 'plentiful' or 'good', 13.9% rated it as 'average', and 40.6% rated it as either 'poor' or 'severely lacking'. These figures indicate that the quality and offer of evening economy uses is very low.
Environmental Quality and Public Realm	Heathfield benefits from well-maintained street paving and a number of trees and hanging baskets positioned along the High Street. Street furniture looks tired in places, but overall, the architecture of the centre is attractive and similar in style with the majority of shopfronts being well maintained. Some poorer quality, less attractive buildings do detract from the overall environmental quality of the centre.
Barriers to Entry	There are identified difficulties in servicing units within the town centre, due to lack of available loading/loading bays on the High Street and limited back of house servicing options for some units. Low vacancy rates and small units have also resulted in a lack of options for potential new retailers.
Customer Views & Behaviour	During the stakeholder consultation, participants were asked a range of questions about how the centre functions, and what could be improved. Comments received during stakeholder consultation included: • Improved signage, particularly in relation to car parking, is needed within the centre; • Community facilities within the centre would be welcomed, particularly a youth centre;

Health Check Indicator	Summary
	• The derelict building in Station Road has been vacant for 15 years, and could be repurposed and used as a central hub; • More pavement dining to stimulate the centre and help with anti-social behaviour by providing general surveillance opportunities; • Vehicle charging points to be installed. When asked what they currently disliked about Heathfield, the most common response from the NEMS in-centre survey (Appendix C) were 'poor range and quality of pubs or bars' (7%). Nearly three quarters of respondents stated 'nothing' (74%). When asked how the centre could be improved, the most common responses from the in-centre survey were 'different or better places to eat and drink' (8%), 'different or better shops or markets' (6%) and 'more or better car parking' (5%). The top three responses from the household survey (Appendix B) when asked what would encourage respondents to visit the centre more often were 'increased general choice and range of shops' (11.7%), 'improved non-food shops' (5.6%) and 'improved leisure facilities' (5.6%).
Key Takeaways	Key takeaways from the health check assessment for Heathfield include: • Heathfield has a particularly high provision of convenience retail, both in terms of number of units and floorspace; • The centre has a low proportion of vacant units (6.6%) when compared to the UK average (12%); • Whilst the town centre has relatively wide pavements, the speed at which cars travel along the High Street detracts from the pedestrian environment. The implementation of traffic calming measures may assist in managing the speeds of private vehicles travelling through the centre; • The centre lacks leisure services, including restaurants. As a result, the centre has a poor evening economy, and this was identified in both the stakeholder consultation and through the NEMS household survey;

Health Check Indicator	Summary
	- Public transport availability is limited within the centre, and therefore visitors are generally reliant on private vehicles or walking; - As servicing has been identified as an issue for traders, a joined up servicing strategy may assist in alleviating key pressure points.

Polegate Service Centre

Description

- 8.30 Polegate is located in the south of the district, five miles from Eastbourne. The centre is linear in nature, running along the High Street, with a train line that runs through the centre of Polegate. The rail line divides the centre into two portions (west and east). Figures 67-69 provide some photographs of the centre. Polegate is classed as a 'Service Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 67. View north on High Street



Figure 68. Dinkum public house



Figure 69. Potential for public art on High Street



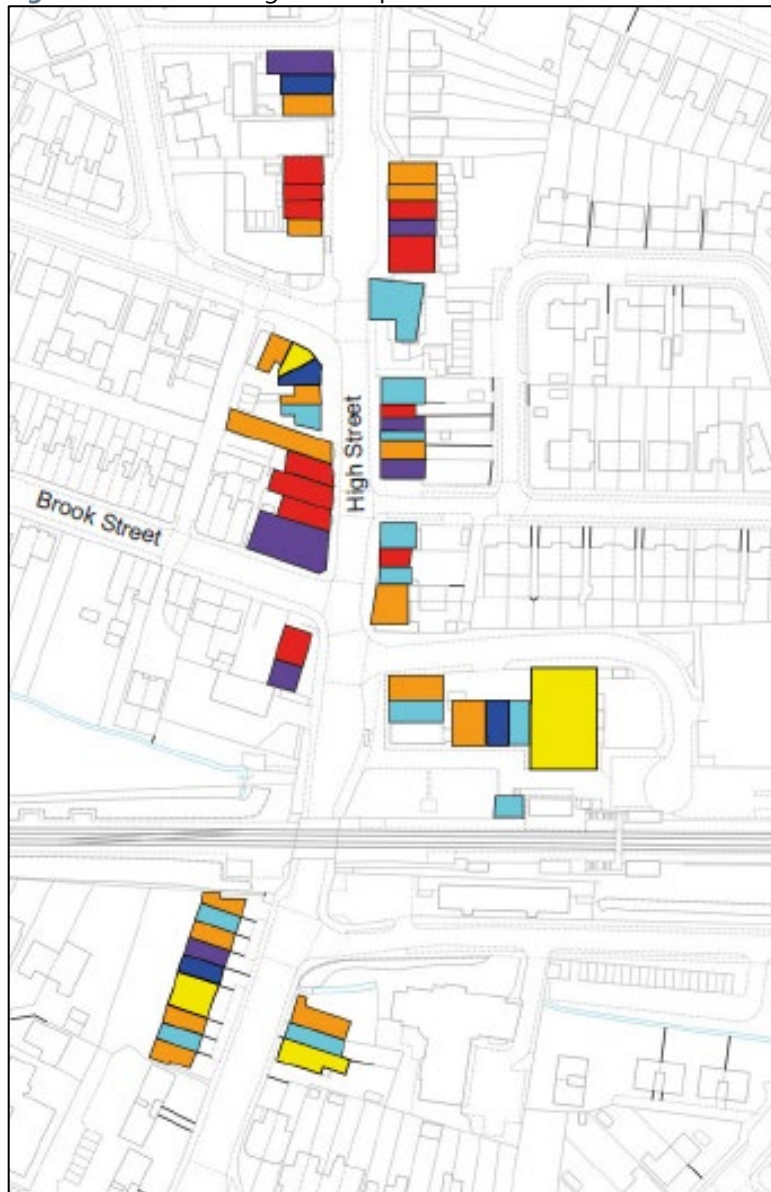
Overall Composition

- 8.31 Figure 70 provides an overview of Polegate's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to previous health checks carried out in July 2015. Figure 71 provides the composition map. A full sized composition map can be viewed at **Appendix E**.

Figure 70. Polegate Service Centre Composition

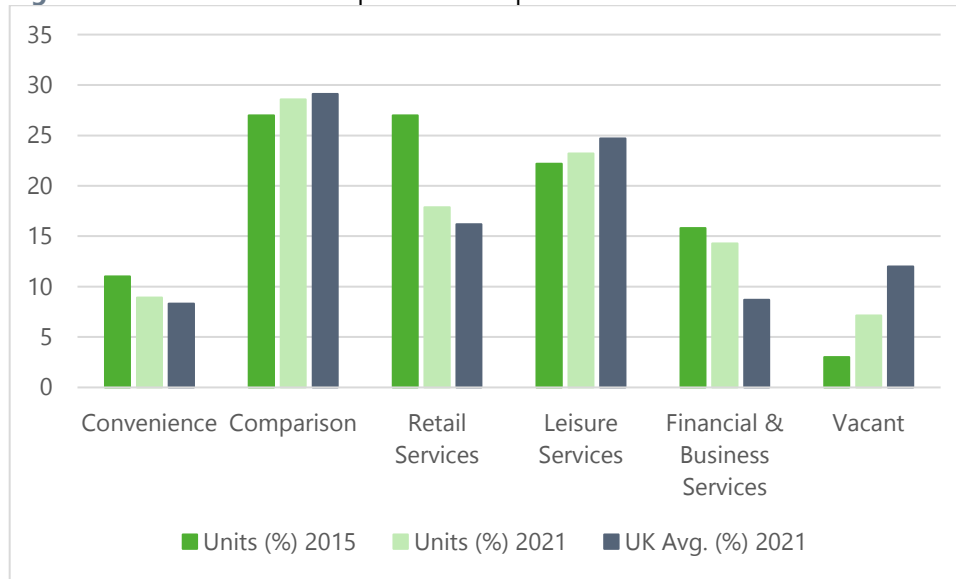
Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun 21 Units (#)	Jun 21 Units (%)	UK Average Jun-21 Units (%)
Convenience	6	11	5	8.9	8.3
Comparison	20	27	16	28.6	29.1
Retail Services	17	27	10	17.9	16.2
Leisure Services	14	22.2	13	23.2	24.7
Fin. & Bus. Services	10	15.8	8	14.3	8.7
Vacant	0	3.0	4	7.1	12.0
Total	49	100	56	100	100

Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 71. Polegate Composition Plan

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

- 8.32 Polegate Town Centre comprises 55 units, providing a range of services, as well as independent stores to cater for the day-to-day needs of the local population. Figure 72 below provides a breakdown of the centre's composition compared to the previous survey in 2015 and the UK averages.

Figure 72. Centre Composition Comparison Chart

8.33 The remainder of the health check indicators for Polegate Town Centre are assessed below.

Health Check Indicator	Summary
Convenience	There are five convenience retail units in the centre including a Co-Operative Store located by the station and a One Stop. Convenience retail units make up 8.9% of the overall composition of Polegate, which is above the UK average of 8.3%. The NEMS in-centre survey also asked respondents where they would undertake their food shopping. A broad range of locations were provided, with the most popular being the Tesco Extra on Lottbridge Drove in Eastbourne (15.9%), the Co-op on the High Street in Polegate (13.6%), the Sainsbury's Superstore at The Beacon in Eastbourne (12.5%) and the Lidl on Dittons Road in Polegate (9.1%).
Comparison	There has been an increase in comparison retail units within the centre since the 2015 survey, from 27.0% to 28.6%. As such, the centre is now broadly in line with the UK average of 29.1% in terms of comparison retail units. The majority of comparison units in the centre are independent stores, including two charity shops, a florist, gifts and hardware. The NEMS in-centre survey asked respondents what kind of changes they would like to see to shops or markets. The most common responses were 'more or new independent shops' (13

Health Check Indicator	Summary
	responses), 'more shops selling clothing or footwear' (7 responses) and 'more shops selling small household goods' (5 responses).
Services	Overall, services account for 54.5% of the centre, a decline of 11.5 percentage points from 2015, where they accounted for 65%. Retail services account for 17.9% of units in the centre, which is slightly above the UK average of 16.2%. Nine out of ten retail service units are classed within the health and beauty category. The centre also has a slightly lower proportion of leisure services (23.2%) compared to the UK average (24.7%). Leisure services are largely limited to takeaways and coffee shops. There is one public house in the centre, The Dinkum, located on the High Street, north of the railway crossing. There has been a decrease in financial and business services within the centre, from 15.8% in 2015 to 14.3% in 2021; however, this is still a greater proportion of financial and business services than the UK average of 8.7%.
Vacancies	Vacancy levels within the centre have risen by 3.1 percentage points since 2015, to 7.1% (four units). The centre has a lower proportion of vacancies when compared to the UK average of 12.0%.
Markets	There is no regular farmers' or street market that takes place in Polegate Town Centre.
Pedestrian Flows	At the time of the Nexus site visits, the majority of footfall within the town centre was observed by the train station and near the Co-Operative Store and at the level crossing when the crossing was in operation.
Accessibility	Polegate has a train station in the heart of the centre with plenty of cycle parking and trains running from Eastbourne to London Victoria, as well as to Brighton on a regular basis. The crossing, which dissects the centre, creates congestion in the centre whilst the trains are passing through and acts as a barrier to pedestrians. Car parking is available behind the Co-operative store and adjacent to the train station. There are 186 spaces available. Short stay

Health Check Indicator	Summary
	parking is free of charge, however, parkopedia.co.uk lists longer stay charges as being £6.40 for 2 hours. Polegate is easily accessible by road and has several bus services. In contrast to the other centres, the results of the in-centre survey carried out in Polegate found that only 26 of the 100 respondents travelled to the centre by private vehicle as either the driver or a passenger, while over half of those asked (57) walked to the centre. The results of the household survey showed that more people questioned travelled by private vehicle (50.2%), and 46.4% stated they would typically walk to the centre.
Perception of Safety	Perception of safety in Polegate was good at the time of the site visits given the amount of natural surveillance provided by people coming and going at the rail station.
Opening Hours and the Evening Economy	Due to the offer available within the centre, Polegate lacks an evening economy, with a majority of units closing at 5:00pm-5.30pm. There are some leisure services including a number of takeaways and a public house. When asked how they would rate the evening and night-time economy in Polegate, 62.8% rated it as either 'poor' or 'severely lacking', while 11.1% rated it as 'average'. These figures indicate that the quality and offer of evening economy uses is very low.
Environmental Quality and Public Realm	The buildings within Polegate's High Street are largely of limited architectural merit and some shop fronts are of poor quality. The large blank grey wall by the chemist would benefit greatly from a mural. The pavements are in need of attention in several places in terms of visual appearance and safety. The area around the train station was observed to be in poor condition and in need of regeneration. There was no litter at the time of the site visit and efforts have been made in terms of hanging baskets and some attractive street lights. A public realm and shop front strategy throughout the centre could be considered to make wholesale improvements to the appearance of the town centre and catalyse for further investment.

Health Check Indicator	Summary
Barriers to Entry	The limited number and size of vacant units would be a barrier to entry in Polegate and stakeholders identified that some form of business support for local businesses would be beneficial.
Customer Views & Behaviour	Comments received during stakeholder consultation included: • Focus should move from retail to experience within the centre; • Visual improvements needed; • Car parking used by commuters with no expenditure in the centre; and • Limited evening economy apart from takeaways. The NEMS in-centre survey (Appendix C) asked what respondents currently disliked about Polegate, and the most common response was 'poor range of shops' (5%). Nearly three quarters of respondents stated 'nothing' (74%). When asked how the centre could be improved, the most common responses from the in-centre survey were 'different or better places to eat and drink' (8%), 'the level crossing lights' (4%) and 'too much traffic' (4%). The top three responses from the household survey (Appendix B) when asked what would encourage respondents to visit the centre more often included 'increased general choice and range of shops' (39.2%), 'improved non-food shops' (13.3%) and 'improved congestion/too busy' (12.8%).
Key Takeaways	The key takeaways from our health check assessment of Polegate Town Centre include the following: • The centre has a low vacancy level compared to the UK average, however the town centre does not appear to attract visitors from outside the immediate catchment, playing only a localised, convenience role; • There is an opportunity to capitalise on commuter trips to the railway station, which is not currently being taken advantage of; • The centre has very poor environmental quality and public realm improvements would be beneficial. In particular, the area around the train station and level crossing would benefit from upgrades;

Health Check Indicator	Summary
	The centre itself suffers from congestion as a result of the level crossing in the centre of Polegate, and this was identified by both stakeholders and survey respondents as a key issue for the town.

Forest Row Service Centre

Description

- 8.34 Forest Row is located to the north west of the district and approximately four miles southeast of East Grinstead, which is located in Mid Sussex District. The core part of the centre is located along London Road, Lewes Road, Hartfield Road and Hillside. Figures 73-75 provide some photographs of the centre. Forest Row is classed as a 'Service Centre' within the Wealden District Core Strategy Local Plan (Adopted February 2013).

Figure 73. Co-Op on Hartfield Road



Figure 74. In-centre parking on Hartfield Road



Figure 75. Brambletye Hotel, London Road



Overall Composition

- 8.35 Figure 76 provides an overview of Forest Row's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to previous health checks carried out in July 2015. Figure 77 provides the composition map. A full sized composition map can be viewed at **Appendix E**.

Figure 76. Forest Row Service Centre Composition

Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun 21 Units (#)	Jun 21 Units (%)	UK Average Jun-21 Units (%)
Convenience	7	11.0	7	12.7	8.3
Comparison	22	27.0	14	25.5	29.1
Retail Services	11	27.0	10	18.2	16.2
Leisure Services	15	22.2	14	25.5	24.7
Fin. & Bus. Services	7	15.8	3	5.5	8.7
Vacant	4	3.0	7	12.7	12.0
Total	66	100	55	100	100

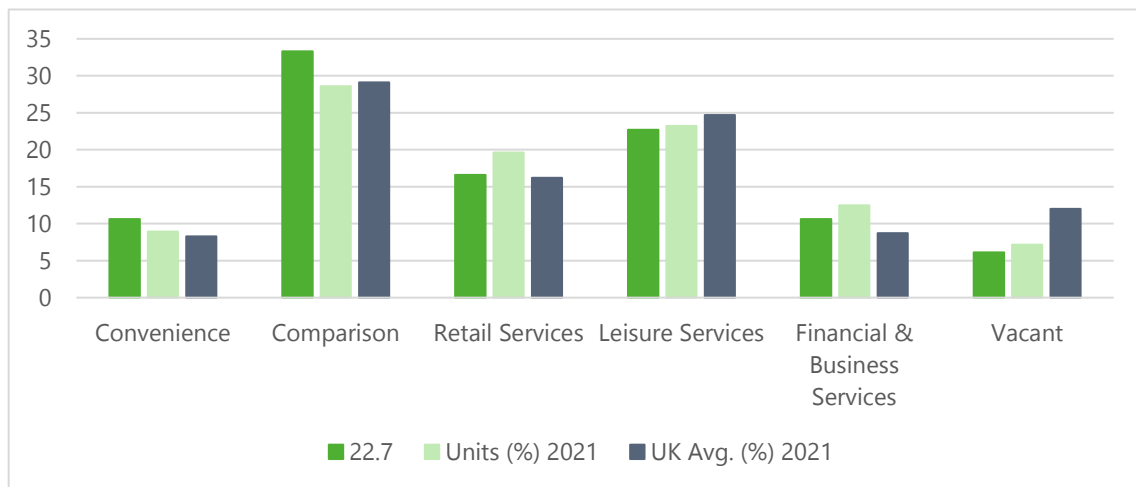
Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 77. Forest Row Composition Map



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

- 8.36 Forest Row centre is comprised of 55 units, which provides a range of services, comprising mainly independent stores, which caters for the day-to-day needs of the local population. Figure 78 provides a breakdown of the centre's composition compared to the previous survey in 2015 and the UK averages.

Figure 78. Centre Composition Comparison Chart

8.37 The remainder of the health check indicators for Forest Row Centre are assessed below.

Health Check Indicator	Summary
Convenience	Seven convenience retail units are located in the centre including a Co-Operative Store and Tesco Express. Convenience retail units make up 12.7% of the overall composition of the centre, which exceeds the UK average of 8.3%.
Comparison	There has been a slight decrease in comparison retail units within Forest Row since the last survey was undertaken in 2015, from 27% to 25.5%. This is under the UK average of 29.1%. The majority of comparison retail units in the centre are independent stores and include a florist, chemist, cycling shop, as well as antiques and homeware.
Services	Overall, services account for 49.2% of the centre, which is a decrease from 65.0% since the last survey was undertaken in 2015. Retail services account for 18.2% of units, which is in excess of the UK average of 16.2%. These are predominately within the health and beauty sector. The centre is broadly in line with the UK average with 25.5% of units being leisure services compared to 24.7% within Forest Row. The centre contains four cafes and two hotels. There has been a significant decrease in financial and business services within the centre, from 15.8% in 2015 to 5.5% in 2021.

Health Check Indicator	Summary
Vacancies	Vacancy levels within the centre have risen by 9.7 percentage points since 2015, to 12.5%. However, at the time of the site visit, two of these units were under alteration. The centre is broadly similar to the UK average of 12.0%.
Markets	The Forest Row Village Market takes places on the first Saturday of every month at Foresters Green.
Pedestrian Flows	At the time of the Nexus site visits, Forest Row town centre was notably busy, particularly in the around the Co-op Store on Hartfield Road and the car park behind, and at the row of shops along Hillside.
Accessibility	There is no train station in Forest Row, but the centre is served by bus routes to Uckfield, East Grinstead, Crawley and Royal Tunbridge Wells. Free car parking is available behind the Co-operative store, with 56 public spaces available, with a further 35 spaces at Hartfield Road car park. At the time of the site visits, the car park was full to capacity. In-centre parking was also in use throughout the centre. The results of the household survey showed that more people who responded travelled by private vehicle (68.7%) than typically walked into the centre (22.2%).
Perception of Safety	The perception of safety in Forest Row was good at the time of the visit.
Opening Hours and the Evening Economy	Due to the number of restaurants and public houses in Forest Row, we would consider the evening economy to function very well. When asked how they would rate the evening and night-time economy in Forest Row, 47.2% rated it as either 'plentiful' or 'good', while 14.9% rated it as 'average'. Only 6.7% of respondents judged it to be 'poor' or 'severely lacking'. These figures indicate that the quality and offer of evening economy uses in Forest Row is positive. The remainder of the centre maintains traditional opening hours.
Environmental Quality and Public Realm	Forest Row is an attractive centre with many buildings of architectural merit. Generally the shopfronts are well maintained and of good quality. Pavements throughout the centre are narrow, especially on parts of Hartfield Road, and the presence of in-centre

Health Check Indicator	Summary
	car parking detracts from the atmosphere for pedestrians. Opportunities exist for improved public realm and street furniture to enhance the centre.
Barriers to Entry	The limited number and size of vacant units could be a barrier to entry for new traders.
Customer Views & Behaviour	The top three responses from the NEMS household survey (Appendix B) to the question 'what would encourage respondents to visit the centre more often' included 'increased general choice and range of shops' (10.3%), 'more parking' (9.5%) and 'better environment' (6.9%).
Key Takeaways	Following our health check assessment of Forest Row, the key takeaways include: • The centre has a very good provision of leisure services and the evening economy is considered to be very strong; • Vacancy levels within the centre have risen since 2015, to 12.5%; however, this is still broadly comparable with the UK average; • The centre has a good range of shopping and services available to meet the needs of the local population; • The one main town centre car park behind the Co-operative Store was full at the time of the Nexus site visits and there was limited in-centre parking available. More car parking was suggested by respondents to the NEMS household survey, as something that would encourage them to visit the centre more often.

Wadhurst Service Centre

Description

- 8.38 Wadhurst centre is linear in nature and located along the High Street. It is approximately seven miles from Royal Tunbridge Wells and is located to the north east of the district. Figures 79-81 provide some photographs of the centre.
- 8.39 Wadhurst is classed as a 'Service Centre' within the Wealden District Core Strategy Local Plan (adopted in February 2013).

Figure 79. White Hart public house



Figure 80. Jempsons convenience store



Figure 81. View north west of High Street



Overall Composition

8.40 Figure 82 provides an overview of Wadhurst's composition at the time of the site visits in June 2021, compared to the UK averages (2021), as well as a comparison to the previous health check carried out in July 2015. Figure 83 provides the composition map. A full sized composition map can be viewed at **Appendix E**.

Figure 82. Wadhurst Service Centre Composition

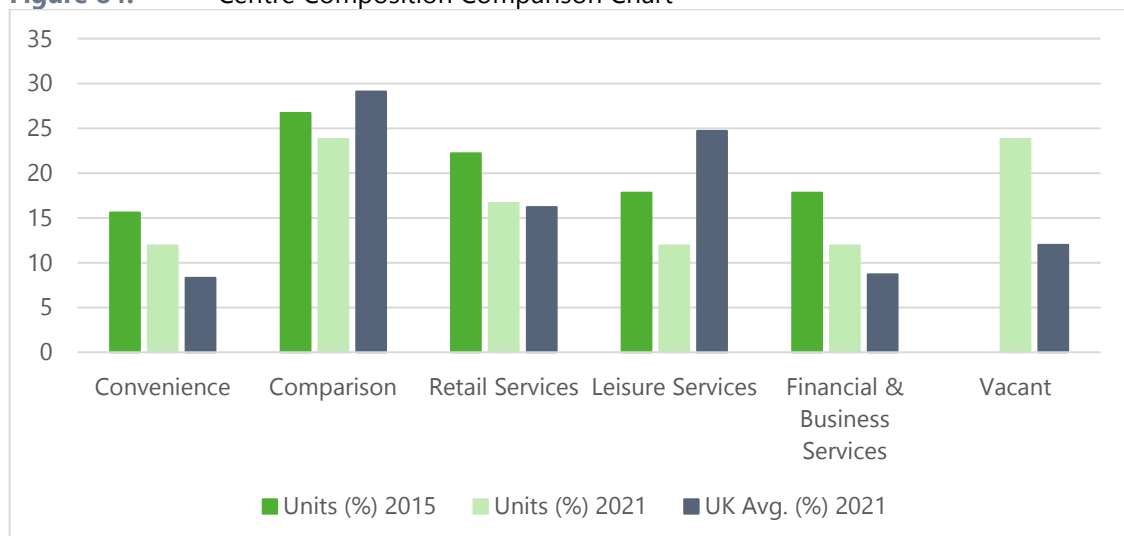
Categories	Jul-15 Units (#)	Jul-15 Units (%)	Jun 21 Units (#)	Jun 21 Units (%)	UK Average Jun-21 Units (%)
Convenience	7	15.6	5	11.9	8.3
Comparison	12	26.7	10	23.8	29.1
Retail Services	10	22.2	7	16.7	16.2
Leisure Services	8	17.8	5	11.9	24.7
Fin. & Bus. Services	8	17.8	5	11.9	8.7
Vacant	0	0.0	10	23.8	12.0
Total	45	100	42	100	100

Source: Nexus Planning 2021, Experian Goad 2021 & Carter Jonas 2016

Figure 83. Wadhurst Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

8.41 Wadhurst is the smallest centre surveyed in the district and comprises 42 units providing a range of services, mostly local in nature. The units are predominantly independent stores and cater for the day-to-day needs of the local population. Figure 84 provides a breakdown of the centre's composition compared to the previous survey undertaken in 2015 and the UK averages.

Figure 84. Centre Composition Comparison Chart

8.42 The remaining health check indicators for Wadhurst are assessed below.

Health Check Indicator	Summary
Convenience	Convenience retail units are well represented in Wadhurst making up 11.9% of the overall composition of the centre, which exceeds the UK average of 8.3%. The main convenience retail units include a Jempsons Local, One Stop, as well as Wealden Whole Foods, Delicious Fine Foods and an independent butcher.
Comparison	Currently comparison units account for 23.8% of all units with Wadhurst centre, a reduction since the previous health check in 2015 and under the UK average of 29.1%. The comparison retail units in the centre were all observed as independent stores, including a florist, stationers, bookshop and two clothing stores. Overall, the offer of comparison goods retailers is considered to provide a good selection of retailers for a centre of its size.
Services	There has been a significant reduction of services available in the centre since the previous survey undertaken in 2015, where 57.8% of units were observed as being in either retail, leisure or financial and business service use. The most recent survey shows that this has reduced to 40.5% in total. Retail services accounted for 16.7% of units, which is comparable to the UK average of 16.2%. These broadly fall within the health and beauty sector, travel agents, and dry cleaners. Leisure services make up 11.9% of the units in the centre, which is significantly lower than the UK average of 24.7% and lower than results in 2015 of 17.8%. There has also been a decrease in financial and business services within the centre, from 17.8% in 2015 to 11.9% in 2021.
Vacancies	At the time of the previous site survey in 2015, no vacant units were recorded. However, in 2021, we noted 10 unoccupied units, primarily concentrated to the southeast of High Street and accounting for 23.8% of the centre. This figure is significantly higher than the UK average of 12.0%. From an analysis of the previous study, the vacancies have been created by the loss of both banks (Lloyds and NatWest), several hairdressers and a reduction in leisure services.

Health Check Indicator	Summary
	Notwithstanding what appears to be a big increase in vacancies in this centre, some of the vacancies are likely to emanate from the short-term impact of the Covid-19 pandemic. Given the relative vitality and health of the centre, we expect this to be a short-term impact only.
Markets	A market occurs on the third Saturday of every month in Wadhurst at the Wadhurst Institute on the High Street.
Pedestrian Flows	At the time of the site visit there were only a limited number of pedestrians to the south east of High Street, which is consistent with the cluster of vacant units. A steady flow of pedestrians were noted by Jempsons. Students from Uplands Community College were noted to contribute to footfall throughout the centre.
Accessibility	A free public car park is available to the rear of the High Street, which has both long stay (52 spaces) and short stay (30 spaces). There is also a small amount of car parking available behind the Jempsons Local. At the time of the site visits, both were observed to be at capacity, and in-centre parking was also difficult to come by throughout the centre. Parking is clearly a key concern for the town centre and a detractor for visitors. In terms of public transport options, there is a bus service that links Wadhurst with Royal Tunbridge Wells. While the railway station is outside of the town centre, the route does offer direct links to London. The results of the NEMS household survey showed that more people questioned travelled by private vehicle (84.2%), whilst only 11.5% stated they would typically walk to the centre.
Perception of Safety	Perception of safety in Wadhurst was good at the time of the visit.
Opening Hours and the Evening Economy	The centre has two public houses, two takeaways units and the Piccolo café providing an evening economy. The remainder of the centre operates traditional opening hours with the exception of Jempsons and One Stop. When asked how they would rate the evening and night time economy in Wadhurst, 21.9% rated it as either 'plentiful' or 'good',

Health Check Indicator	Summary
	while 28.9% rated it as 'average' and 24.8% of respondents judged it to be 'poor' or 'severely lacking'.
Environmental Quality and Public Realm	Wadhurst is an attractive centre with well-maintained shop fronts of good quality. The mixed-use Jempsons development works well in the centre. Pavements throughout the centre are narrow and the presence of in-centre parking detracts from the atmosphere for pedestrians. Opportunities exist for improved public realm and street furniture to enhance the centre.
Barriers to Entry	There are currently vacant units within the centre, providing opportunities for new retailers to enter the centre. However, the majority of available units in the centre were observed to have smaller floorplates, which may not be attractive for larger operators.
Customer Views & Behaviour	The top three responses to the question asking what would encourage respondents to visit the centre more often in the NEMS household survey (Appendix B) included 'more parking' (44.4%), 'increased general choice and range of shops' (39.2%), 'improved non-food shops' (21.4%) and 'improved congestion/too busy' (16.7%).
Key Takeaways	The key takeaways from the health check assessment of Wadhurst Town Centre include: • There are currently 10 unoccupied units, primarily concentrated to the southeast of the High Street and account for 24.4% of the centre. Whilst this proportion is higher than the UK average, it is likely a short-term impact of the Covid-19 pandemic. Given the relative health of the centre generally, we would expect some of the vacant units to come back into use; • Wadhurst comprises largely independent stores, which creates a niche centre and should be further encouraged; • There is a notable shortage of car parking within the centre, and this detracts from the visitor experience. Traffic is also an issue at peak times, including school drop-off and pick-up. Parking management is required in the centre;

Health Check Indicator	Summary
	• Public realm improvements would further enhance the already attractive centre.

9 Property Market Review & Strategy

Town Centre Commercial Property Market Summary

- 9.1 This chapter of the report summarises both the commercial and residential property markets across the five high order town centres (Uckfield, Hailsham, Crowborough, Heathfield and Polegate). This exercise brings together the findings of the trends analysis in Chapter 4, the property market assessment in Chapter 5, market share and capacity assessments in Chapters 6 and 7, and health check findings in Chapter 8. This review is undertaken to determine whether the market is likely to deliver new property in the town centres within the plan period and if so, what form it is likely to take. An understanding of these considerations will help to shape the policy recommendations later in this report.
- 9.2 The data and information included in this chapter are based on detailed analysis we have undertaken for each of the town centres listed above. We have produced a separate more detailed report for each centre, which is provided in **Appendix F**.
- 9.3 First, we provide an overview of take-up and supply data since January 2015 for the different subsectors of the commercial markets in all the town centres listed above. We then summarise and conclude our analysis of the commercial markets, including a brief description of findings from our commercial agent consultations.
- 9.4 We then analyse the town-centre residential markets. This analysis looks at new-build sales using Land Registry data and cross-referencing these transactions with the EPC register in order to identify relevant floorspace figures. We have also consulted Rightmove and Zoopla in order to identify asking prices for new-build properties across the town centres in the District. We have subsequently provided a brief overview of our consultation with local residential estate agents, followed by a summary of the residential markets across the town centres. We also briefly analyse the market for retirement living to identify if there could be opportunities for this type of residential development in the town centres within the plan period.

Retail

Retail Floorspace Take-Up

- 9.5 The retail leasehold take-up (i.e., the amount of retail floorspace let) across the five high-order town centres since January 2015 is displayed in Figure 85. We note that this figure contains both comparison and convenience retail floorspace.

Figure 85. Retail Leasehold Take-Up since January 2015

Town Centre	Total Take-Up (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	24,479	25	3,497	0 – 10,326
Uckfield	49,120	25	7,017	391 – 32,596
Crowborough	15,739	17	2,248	316 – 5,363
Heathfield	20,334	10	2,905	0 – 11,153
Polegate	5,976	9	853	0 – 2,122

Source: CoStar, EGI, 2021.

- 9.6 Uckfield had a significantly higher level of retail floorspace take-up than the other town centres in Wealden District since 2015. It should be noted that this figure is not fully representative of the average levels of take-up in the town as one transaction at the Bellbrook Industrial Estate in 2015 accounted for 15,700 sq ft of Uckfield's total take-up. Given this is a much larger-than-average letting for the town, the total and accurate floorspace figures for Uckfield are therefore increased disproportionately. The majority of this floorspace take-up was for convenience retail providers. However, there was also a small number of transactions from comparison retail providers.
- 9.7 Hailsham and Crowborough both had similar levels of total and average floorspace take-up since 2015. Again, the majority of the take-up in both towns was from convenience retail providers with a small number of transactions for comparison retail units also. Heathfield also experienced a significant level of take-up since 2015 given the town's population and lower standing within the high order town centres.
- 9.8 Polegate experienced the lowest level of take-up across the town centres. This is expected given the town's lower population and proximity to Eastbourne. The town experienced one or two retail lease transactions per annum for smaller-scale units since 2015.
- 9.9 Notably, across a five-year period, there are relatively few recorded transactions in any of the towns. The most active are Hailsham and Uckfield, with an average of five deals per annum across a five-year period. Additionally, the number of deals per annum varies in all towns, with some years featuring no transactions and others with a much higher number. This suggests that demand is not consistent and fluctuates over time.
- 9.10 Figure 86 displays the retail unit and floorspace sales for the all the high order town centres since January 2015.

Figure 86. Retail Unit Sales since 2015

Town Centre	Total Take-Up (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	41,075	15	5,868	0 – 26,178
Uckfield	7,004	6	1,001	0 – 2,838
Crowborough	7,411	6	1,059	0 – 4,358
Heathfield	1,262	2	180	0 – 874
Polegate	5,978	3	854	0 – 4,105

Source: CoStar, EGI, 2021.

- 9.11 Hailsham's town centre market experienced the highest volume of market sales for retail floorspace amongst the high order town centres. Whilst there have been no recorded sales in 2021 (likely due to the Covid-19 pandemic), every previous year saw at least 1,000 sq ft of retail floorspace sales. Much like the lease evidence above, some years saw multiple transactions, whilst other years experienced relatively few.
- 9.12 Uckfield and Crowborough have seen near-identical levels of floorspace sales since 2015. Both towns have experienced years in which no floorspace has sold; however, the number, size and total floorspace figures are similar.
- 9.13 Polegate experienced a greater total of retail floorspace sales than Heathfield, however the number of units sold in the two towns is similar. Both towns experienced a number of years in which no sales occurred which suggests that there may either be a lack of suitable supply or a preference among occupiers for leasing. This may be particularly relevant for Heathfield, where the retail floorspace leasing figures were noticeably higher than corresponding sales figures.

Retail Floorspace Supply

- 9.14 Figure 87 below displays the current retail leasehold availability across the five high order town centres.

Figure 87. Retail Floorspace Availability

Town Centre	No. of Availabilities	Total Floorspace Available (sq ft)	Unit Availability Size Range (sq ft)
Hailsham	9	12,368	433 – 3,088
Uckfield	3	7,547	1,245 – 4,726
Crowborough	3	2,840	782 – 2,058

Town Centre	No. of Availabilities	Total Floorspace Available (sq ft)	Unit Availability Size Range (sq ft)
Heathfield	3	5,544	371 – 3,837
Polegate	-	-	-

Source: CoStar, EGI, 2021.

- 9.15 Hailsham has both the highest number of retail lease availabilities and the largest volume of floorspace available. There are a range of sizes and quality of units available, helping to meet the needs of different types of business.
- 9.16 Uckfield, Crowborough and Heathfield all have three retail units available for leasing. The units available in Uckfield are typically larger than those in Heathfield and in Crowborough. Polegate does not currently have any retail units available to let.
- 9.17 Figure 88 displays the current retail floorspace sales availability across the town centres.

Figure 88. Retail Floorspace Sales Availability

Town Centre	No. of Availabilities	Total Floorspace Available (sq ft)	Unit Availability Size Range (sq ft)
Hailsham	1	2,035	2,035
Uckfield	1	2,904	2,904
Crowborough	2	1,203	336 – 867
Heathfield	1	509	509
Polegate	-	-	-

Source: CoStar, EGI, 2021.

- 9.18 All towns, except Polegate currently have one or two retail units available for sale. The units available in Hailsham and Uckfield are larger 2,000+ sq ft units, whilst the market sale listings in Crowborough and Heathfield are for smaller c.500 sq ft units.
- 9.19 Polegate does not currently have any retail units listed as available for sale.

Food & Beverage (F&B)

F&B Floorspace Take-Up

- 9.20 The F&B leasehold take-up across the five high-order town centres since January 2015 is displayed in Figure 89.

Figure 89. F&B Leasehold Take-Up since January 2015

Town Centre	Total Take-Up (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	3,227	4	461	0 – 2,499
Uckfield	-	-	-	-
Crowborough	2,608	3	372	479 – 1,238
Heathfield	-	-	-	-
Polegate	1,309	2	187	0 – 761

Source: CoStar, EGI, 2021.

- 9.21 Crowborough experienced the largest total leasehold floorspace take-up since 2015. Whilst the town had the same number of transactions occur as in Hailsham, the average size of the units that transacted was higher.
- 9.22 Polegate saw two transactions occur across the 7-year period since 2015. However, it did experience a number of years where no F&B floorspace was let. This shows sporadic take-up of leasehold floorspace with no observable pattern.
- 9.23 Both Uckfield and Heathfield have not experienced any recorded F&B floorspace lettings since 2015 that we could identify.
- 9.24 Figure 90 displays the achieved sales for F&B floorspace across Wealden's town centres since January 2015.

Figure 90. F & B Floorspace Sales since January 2015

Town Centre	Total Floorspace Sales (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	-	-	-	-
Uckfield	-	-	-	-
Crowborough	893	1	128	0 – 893
Heathfield	-	-	-	-
Polegate	1,175	1	168	0 – 1,175

Source: CoStar, EGI, 2021.

- 9.25 There have been no recorded F&B floorspace sales in Hailsham, Uckfield or Heathfield since 2015. Both Crowborough and Polegate have achieved one transaction each during this period, with both transactions being for smaller sub-1,500 sq ft units.

F&B Floorspace Supply

- 9.26 As of May 2022, no units were listed as available to let in any of the town centres. However, as there are units listed as available to let for retail floorspace and F&B space now falls under the flexible, Use Class E, which indicates that space could be available for F&B use where demand does arise. However, no space is actively being marketed for this specific use.
- 9.27 The only unit listed as available for freehold sale specifically for F&B usage across the town centres is located in Crowborough. This unit is 1,540 sq ft in size.

Office

Office Take-Up

- 9.28 The office leasehold take-up across the high-order town centres since January 2015 is displayed in Figure 91.

Figure 91. Office Leasehold Take-Up since January 2015

Town Centre	Total Take-Up (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	9,381	11	1,340	0 – 2,677
Uckfield	10,697	9	1,528	0 – 4,291
Crowborough	4,651	7	664	0 – 2,989
Heathfield	2,159	3	308	0 – 1,278
Polegate	-	-	-	-

Source: CoStar, EGI, 2021.

- 9.29 Hailsham experienced the highest volume of transactions across the high order town centres. Whilst two fewer transactions occurred in Uckfield, these transactions typically featured larger units, hence the greater total take-up than Hailsham. Both towns experienced years where no office floorspace was let, indicating that demand fluctuates and is inconsistent.
- 9.30 Crowborough saw one office unit per annum let on average; however, this town also experienced years where no floorspace was transacted. Heathfield displayed a sporadic pattern of office take-up, with four of the seven years since 2015 not seeing any lease transactions occur. No office transactions have occurred in Polegate since January 2015.
- 9.31 Figure 92 displays the market sale transactions for offices across the town centres that have occurred since January 2015.

Figure 92. Office Sale Transactions since January 2015

Town Centre	Total Take-Up (sq ft)	Total No. of Transactions	Average Annual Take-Up (sq ft)	Annual Take-Up Range (sq ft)
Hailsham	20,588	5	2,941	0 – 11,672
Uckfield	1,998	1	285	0 – 1,998
Crowborough	5,573	2	796	0 – 3,918
Heathfield	-	-	-	-
Polegate	-	-	-	-

Source: CoStar, EGI, 2021.

- 9.32 Hailsham has achieved the highest total office floorspace sales across the town centres. However, Hailsham has also experienced years since 2015 in which no floorspace was sold.
- 9.33 Both Uckfield and Crowborough saw sporadic activity in their respective town centre office sales markets. Both towns saw office floorspace sell infrequently and the majority of years for both towns did not see any transactions occur. No office floorspace has sold in Polegate and Heathfield Town Centres since January 2015.

Office Supply

- 9.34 Figure 93 displays the current office leasehold availability across the five high order town centres.

Figure 93. Office Floorspace Leasehold Availability

Town Centre	No. of Availabilities	Total Floorspace Available (sq ft)	Unit Availability Size Range (sq ft)
Hailsham	9	12,368	433 – 3,088
Uckfield	3	7,547	1,245 – 4,726
Crowborough	3	2,840	782 – 2,058
Heathfield	3	5,544	371 – 3,837
Polegate	-	-	-

Source: CoStar, EGI, 2021.

- 9.35 Hailsham has both the highest number of office leases availabilities and the largest volume of floorspace available.
- 9.36 Figure 94 shows the availability of office floorspace across the town centres for freehold sale.

Figure 94. Office Floorspace Freehold Availability

Town Centre	No. of Availabilities	Total Floorspace Available (sq ft)	Unit Availability Size Range (sq ft)
Hailsham	5	5,256	161 – 3,088
Uckfield	2	2,921	1,377 – 1,544
Crowborough	2	5,573	1,655 – 3,918
Heathfield	2	2,660	920 – 1,740
Polegate	-	-	-

Source: CoStar, EGI, 2021.

- 9.37 In line with available office lettings, Hailsham Town Centre also has the most office units available for freehold acquisition. Crowborough has a similar level of total office floorspace available in the town centre, although this floorspace is only available across two units.
- 9.38 Both Uckfield and Heathfield have similar levels of office floorspace available across two lettings respectively. All units available in these town centres range from c.1,000 – 1,500 sq ft in size. This suggests that these units will meet the needs of smaller local businesses, whilst there is less space available to accommodate larger requirements. This may be understandable given that neither location is considered a significant 'office hub'.
- 9.39 Polegate does not currently have any listings for freehold acquisition of office space in its town centre.

Cinema & Theatre

Cinema & Theatre Floorspace Take-Up

- 9.40 There have been no recorded lettings of floorspace for cinema and theatre use since January 2015 in any of the town centres. There has also been no recorded sales of floorspace for cinema and theatre use since January 2015 in any of the town centres.

Cinema & Theatre Floorspace Supply

- 9.41 There are no current availabilities for leasehold acquisition of floorspace for cinema and theatre use in any of the town centres. There are also currently no listings for market sale of floorspace for cinema and theatre use in the town centres.

Health & Fitness

Health & Fitness Floorspace Take-Up

- 9.42 There have not been any achieved lettings of floorspace for health and fitness use across any of the town centres since January 2015. There have also not been any recorded sales of floorspace across any of the town centres for health and fitness use since January 2015.

Health & Fitness Floorspace Supply

- 9.43 There are currently no listings for leasehold acquisition of floorspace for health and fitness use in any of the town centres. There are also currently no listings for market sale of floorspace specifically for health and fitness use in any of the town centres.

Commercial Agent Consultation

- 9.44 We have consulted local agents to gain a better understanding of the type of demand present in the town centre commercial property markets. This has allowed us to identify the types of tenants that are active in the market, as well as the quality and level of floorspace available in the current market. It also enables us to identify niche factors in the town centre commercial markets that may not have been picked up in our data analysis. More detailed analysis on our agent consultation for individual towns can be found in **Appendix F**.
- 9.45 We summarise our findings below:
- Agents stated that all of the high-order town centres primarily focus on serving the convenience needs of those towns and surrounding villages. All of the town centres provide differing levels of comparison retail, although the general theme is that consumers travel to nearby regional retail hubs such as Royal Tunbridge Wells or Eastbourne for significant comparison purchases.
 - In general, and as picked up in the health check exercises, all of the high-order town centres lacked name-brand operators. More are present in the larger town centres such as Uckfield and Hailsham; however, a significant portion of retail floorspace across all towns was occupied by locally-based independent businesses.
 - Occupiers tended to prefer smaller sub-1,500 sq ft units in the town centre. Agents stated in some cases this was due to lack of available supply for larger units; however, more often it was the case that these independent local occupiers had a focus on affordability rather than size and quality of floorspace.

- There has been a district-wide shift towards catering-style F&B businesses. Most towns have a lack of sit-down dining experiences and few 'evening economy' provisions. Agents stated that some towns like Uckfield & Hailsham may in the future benefit from public realm investment. However, some of the smaller town centres would face challenges in terms of finding adequate locations for any 'evening-economy' uses.
- There is no prominent office market in any of the towns. The majority of occupiers are locally-based businesses servicing local needs (e.g. family lawyers, accountants etc.). The office market has suffered as a result of new Permitted Development Rights that allow for the change of use offices to residential without planning permission (albeit, that it is subject to some local authority control). A large portion of office stock above ground floor retail in Wealden's Town Centres has been redeveloped into residential flats.
- Agents suggested that there was no excess demand for health and fitness provisions or cinema and theatre provisions in any of the towns. Hailsham and Uckfield both have dedicated cinema facilities that absorb local demand for these services, whilst some demand is absorbed by larger facilities in Royal Tunbridge Wells and Eastbourne. All the towns apart from Polegate have local commercial gyms, as well as a dedicated town leisure centre.

Commercial Markets Summary

9.46 We now provide a summary of the commercial markets in the high order town centres. Further detail on the analysis behind these summaries can be found in **Appendix F** to this report.

Uckfield

9.47 As stated in Uckfield's health check section, the town is one of the primary retail and leisure destinations in the district, providing a range of services and amenities that are not widely available within the smaller settlements. Uckfield is the largest centre in the district and the centre has a good mix of uses with similar proportions of convenience, comparison, retail, financial and business services to UK averages.

9.48 Whilst the town centre's convenience offering includes a Tesco and Waitrose superstore, there is an absence of any large-scale discounted retail offering. Aldi is currently looking for a site in Uckfield, which may present an opportunity to diversify the convenience offering in the town. The town also has a reasonable provision of independent convenience retail offerings that services demand for everyday 'top-up' goods.

- 9.49 The town does provide some comparison retail offerings although the majority of these are from smaller-scale businesses. Uckfield's location in close proximity to larger commercial hubs such as Brighton, Tunbridge Wells, Lewes and Eastbourne acts as a limiting factor for the town's comparison retail sector. Agents confirmed that large comparison purchases are typically made in these nearby hubs or online. Therefore, there is a lack of demand for floorspace in Uckfield from larger-scale comparison operators.
- 9.50 There is a reasonable provision of F&B services in the town although there is evidence of the district-wide shift towards catering style provisions such as coffee shops and takeaways. Investment in the public realm and the identification of a central 'evening economy' hub as part of a town centre strategy could provide a significant pull factor that brings residents into the town centre in the evenings and nights. The town already has the Picture House cinema and Broadway nightclub and building on these provisions could lead to a vibrant evening economy in the long term, especially given the significant residential development occurring in the south of Uckfield at Ridgewood Farm.
- 9.51 Uckfield's office market has been relatively quiet since 2015, with few leases and sales in this period and only two units currently available. Agents stated that Uckfield is not considered a viable office location by larger-scale occupiers. We conclude that it is unlikely to attract these types of occupiers in the short term due to both the lack of commercial demand and the lack of suitable available space. Agents clarified that lack of suitable available space referred to both quality and size. Despite the lack of large-scale office demand, a number of smaller flexible workspace facilities have opened in the town and are proving to be popular with local businesses.
- 9.52 Uckfield's Picture House Cinema satisfies the majority of demand for theatre and cinema provisions in the town. We anticipate that there will not be sufficient demand for additional cinema or theatre provisions in Uckfield to warrant a new occupier opening a facility in the town throughout this plan period.
- 9.53 Uckfield currently has a strong offering of health and fitness facilities. These range from conventional gym facilities to martial arts and yoga classes. Uckfield Leisure Centre is also located in close proximity to the High Street. Agents considered the current fitness provision in the town centre to be sufficiently meeting demand and there has been no market activity since January 2015.

Hailsham

- 9.54 As covered in the health check section, the town has the second largest centre in the district. The composition of Hailsham is broadly in line with UK averages, and serves the area well in terms of convenience stores and services. As with Uckfield, the centre largely comprises independent retailers with a limited number of national multiples including Boots, WHSmith and Superdrug. Retail services accounts for more than half the units in the centre.
- 9.55 Hailsham's convenience retail market is strong. The town provides a high-quality convenience offer with the presence of Waitrose and there is further demand for new floorspace from discounted brands such as Aldi and Lidl. Based on analysis of current property market conditions, it is unlikely that there will be demand for sites for significant convenience retail development throughout the plan period (assuming another operator such as Aldi or Lidl takes up space in the near future). In terms of comparison retail, demand is typically driven by smaller local independent operators. Given competition from strong surrounding towns such as Eastbourne and wider structural challenges in the market, it is unlikely that there will be strong demand for floorspace in the Town Centre from national brand comparison retailers.
- 9.56 The evening offer in Hailsham is fairly limited for a town of its size. At present, residents may visit towns such as Eastbourne for evening entertainment and dining and so this competition is challenging. If new reasons can be provided to attract visitors to the town, this could help to attract investment from businesses. However, those businesses providing a food and beverage offer are more likely to be local businesses, rather than national chains.
- 9.57 There is very little demand for office floorspace in Hailsham's Town Centre. The current demand is from service-based local businesses seeking small units at affordable rents. New, large-scale office floorspace in the town centre is therefore unlikely to represent an opportunity. Agents suggest that businesses' preference is for space on industrial estates and locations beyond the town centre. Rents are also at a level where the market will not deliver new floorspace and so delivery of new office space is likely to require public-sector intervention in both the short and long term. Demand is also likely to be for smaller office units, with potential demand for flexible workspace facilities if the occupier preferences exhibited during the Covid-19 pandemic remain over the plan period.
- 9.58 There has been no market activity for cinema or theatre use in Hailsham in recent years. Hailsham Pavilion provides the town's current cinema and theatre entertainment, which agents

suggest currently satisfies the town's demand alongside existing facilities in Eastbourne and Tunbridge Wells.

- 9.59 There is a reasonable existing health and fitness provision in Hailsham and competition from Hailsham Leisure Centre means that commercial operators are unlikely to provide new space for this use.

Crowborough

- 9.60 As covered in the health check section, Crowborough is the third largest district centre in the Wealden after Uckfield and Hailsham. The town centre is linear in structure, primarily located along High Street, The Broadway and Croft Road.
- 9.61 The retail market in Crowborough's Town Centre has faced challenges in recent years. The units being taken have tended to be of moderate quality with agents indicating that affordability was a priority for the majority of occupiers. Agents suggested that these independent businesses have fared well throughout the Covid-19 lockdowns, utilising local newspapers and social media to advertise themselves during this period. There is a strong provision of convenience retail in Crowborough, especially in the town centre. Waitrose and Lidl provide high-end and discounted retail options respectively, whilst Morrison's cover the middle of the convenience retail market. A Tesco Superstore and Sainsbury's Local are present at Jarvis Brook and a small M&S all on sites outside of the town centre.
- 9.62 The comparison retail offering in Crowborough's Town Centre is less prominent. Whilst there are some small-scale comparison retailers, these focus on smaller-sized comparison goods. The general consensus amongst agents is that most comparison retail needs are met by Royal Tunbridge Wells as this provides a much wider range of comparison retailers, particularly for fashion-related goods.
- 9.63 Crowborough has experienced a shift towards catering-style F&B outlets. There is a noticeable lack of any evening economy provisions. F&B operators have also been negatively impacted throughout the Covid-19 pandemic whilst takeaway-style businesses have been able to remain open, enabling them to thrive. Agents also suggested that this may be the cause of the lack of sit-down F&B provisions in Crowborough's Town Centre.
- 9.64 Crowborough's Town Centre office market has seen moderate activity since 2015. Occupiers tend to be locally-based businesses focused primarily on serving the needs of the town's population and catchment area. Occupier preference is for sub-1,000 sq ft units with a focus on

affordability rather than quality. Agents stated that the town's Basepoint flexible working facility in the town centre has proved a popular alternative to conventional office lettings. Agents stated that there may not currently be sufficient demand for flexible workspace facilities to justify new development although they were more optimistic about the long-term opportunities for a new facility in the plan period.

- 9.65 There is currently no purpose-built cinema or theatre provisions in Crowborough. Pine Grove Pictures provides affordably-priced screening for up to 200 people, however this cinema facility only operates once a month. Agents stated that this satisfies some demand for cinema and theatre services in the town although the majority of demand is absorbed either by existing cinema facilities in Royal Tunbridge Wells or Uckfield. Agents did not anticipate interest from any large-scale operators in the near future.
- 9.66 Our research indicates a reasonable provision of health & fitness space in Crowborough. A wide range of activities is offered through private gyms and other types of establishments. The existing leisure centre has also seen significant investment by the Council in recent years. Agents suggested that the current supply of property is sufficient to meet demand.

Heathfield

- 9.67 Heathfield is a market town situated in the centre of the district. The majority of the commercial units can be found along the High Street and Station Road, with this acting as the main centre of activity for the town. Heathfield is classed as a 'Service Centre' within the Wealden District Core Strategy Local Plan 2013.
- 9.68 Heathfield's Town Centre retail market primarily serves the day-to-day needs of the local population. The majority of occupiers are locally-based independent businesses who are occupying smaller sub-2,500 sq ft units. There is a strong supply of convenience retail in Heathfield, with four national-scale convenience providers present. There may be opportunities in the future for a discounted retail store such as Aldi or Lidl as there are no current occupiers that cover this sector of the market, however, any potential occupier of this kind may be dissuaded given the high concentration of convenience retail in the town. The comparison offering is more limited, with some provisions from independent operators but a lack of national-scale operators. Agents stated that most demand for comparison products is typically satisfied through e-commerce or by nearby commercial hubs like Royal Tunbridge Wells or Eastbourne. It is unlikely that there will be future opportunities for large-scale comparison retail in Heathfield.

- 9.69 Whilst there are some F&B operators in Heathfield Town Centre, the majority of these are 'catering-style' businesses that do not offer a sit-down dining experience. There is also a noticeable lack of evening economy offer, such as bars and restaurants, with agents stating that encouraging such an economy may be difficult. Agents stated that there is no obvious location within the town centre for such an area and that, combined with a lack of public realm investment and lack of suitable (both size and quality) available space, such development may present significant challenges.
- 9.70 Sporadic take-up of office floorspace shows no observable trend of take-up. The available data suggests that occupiers in Heathfield prefer smaller sub-1,000 sq ft units and that there is an occupier preference for leasing over purchasing. Agents highlighted that the conversion of small office spaces above ground floor retail under Permitted Development Rights as a particular issue. The smaller businesses that these units previously housed are now being run from home, hence the lack of take-up.
- 9.71 The cinema and theatre market has not seen any activity since 2015 and there are currently no provisions within the town. Agents suggested that demand was being satisfied by nearby hubs like Uckfield and Royal Tunbridge Wells and that there is unlikely to be interest from operators in opening a facility in the town.
- 9.72 There is a reasonable provision of health & fitness space in Heathfield and agents suggest that the current supply of property is sufficient to meet demand. One agent suggested that Heathfield Leisure Centre's location outside of the town draws footfall away from the high street and that moving it into a more central location would have a positive impact on the town centre.

Polegate

- 9.73 Polegate's retail market typically sees one or two transactions per annum for smaller sub-1,000 sq ft units. Agents highlighted that the majority of existing office floorspace in Polegate is not premium quality and that occupier priority is typically affordability rather than quality. Polegate has a limited offering of convenience retail, with the Co-op store located next to the rail station and the Lidl located in the east of the town (along Dittons Road) providing the only national-scale occupiers. The remaining convenience offering in Polegate from smaller independent retailers is weaker than in other town centres in Wealden District. The comparison retail market is even more limited, with very little offering from local businesses and no national-scale brands in the town.

- 9.74 There is also a lack of F&B offering. The existing offering consists of 'catering-style' outlets such as coffee shops and take-away units. There is also a very limited offering of sit-down dining experiences. Agents also raised issues with the unpedestrianised roads and heavy traffic on the High Street, commenting that this could hinder potential prospects for development of this type of offer. It was widely agreed that attracting national-scale F&B operators to Polegate was unlikely.
- 9.75 Polegate's office market is limited. The majority of office activity has occurred in Chaucer Business Park, which is some distance from the town centre. There are also no flexible workspace facilities in the town, with agents stating that any occupiers looking for this type of facility will look to other towns in Wealden, or more likely to Eastbourne.
- 9.76 There has been no market activity for cinema or theatre use in Polegate since 2015. There are also no existing facilities in the town that provides these services. Agents agreed that all demand for cinema and theatre provisions is satisfied by other town centres in Wealden like Uckfield or Hailsham or by the Cineworld facility in Eastbourne. It is highly unlikely that a cinema provider would consider Polegate as a viable location to occupy.
- 9.77 Our analysis indicates a limited provision of health and fitness facilities in Polegate. The only existing facilities are located in Chaucer Business Park. These facilities consist of conventional gym offerings. In addition, Polegate does not have a leisure centre, as the other towns in Wealden have. Despite this, agents did not anticipate that there was excess demand for another fitness facility and stated that there were also a number of facilities in Eastbourne that also satisfy this demand.

Town Centre Residential Property Markets Summary

- 9.78 We have undertaken an analysis of the town centre residential property market for Wealden's high-order town centres. We have undertaken this analysis to establish the current appetite for town centre living as well as the level of supply available in the current market. This will allow us to identify any opportunities for town centre residential development throughout the plan period.
- 9.79 Our analysis has focussed initially on flatted and terraced housing transactions. These property types allow for higher density development and are often better suited for town centre development sites. For completeness, we have also looked at the markets for larger housing types also.

Transaction Volumes

- 9.80 Figure 95 shows recorded sales that have occurred in and around the town centres over the past two years (from July 2019). This data takes into account both new-build and second-hand property. This analysis indicates how active the markets are, giving an understanding of trends in take-up.

Figure 95. Recorded Transactions by Property Type (July 2019 - July 2021)

Town Centre	Total No. of Transactions	Detached	Semi-Detached	Terraced	Flats
Hailsham	539	166	189	140	44
Uckfield	434	153	111	121	49
Crowborough	580	275	160	65	80
Heathfield	307	111	93	44	63
Polegate	387	106	191	51	39

Source: Rightmove, 2021.

- 9.81 This data shows that detached and semi-detached properties are typically the most popular housing types in and around the town centres. Terraced properties are still shown to transact fairly regularly in the town centres although not at the level of detached and semi-detached housing (with the exception of Uckfield where transaction volumes for these property types are shown to be high similarly).
- 9.82 Flatted properties are shown to have typically transacted the least. This is to be expected as there is not a significant amount of flatted stock throughout the district. However, sales numbers for flats in Crowborough and Heathfield are slightly higher than sales numbers for terraced housing.

Supply

- 9.83 Figure 96 shows the current number of market sale listings by property type in and around the town centres. Again, this data features both new-build and second-hand accommodation.

Figure 96. Market Sale Listings by Property Type

Town Centre	Total No. of Listings	Detached	Semi-Detached	Terraced	Flats
Hailsham	46	31	5	2	8
Uckfield	55	4	4	5	42
Crowborough	17	0	0	1	16
Heathfield	28	0	1	0	27
Polegate	14	2	4	3	5

Source: Rightmove, 2021.

- 9.84 Uckfield has the largest supply of housing available in and around the town centre. Flatted properties generally have the highest number of current market sale listings out of the property types with the exception of Hailsham, where 67% of the current available stock is for detached housing.

New-Build Flats

New-Build Flats Achieved Values

- 9.85 We were only able to identify two new-build transactions for flatted properties that have occurred over this period across all of the town centres in Wealden District. These transactions occurred at the Bailey Place development in Crowborough. These 67 sq m flats sold in December 2020 for £260,000 and £252,500 respectively. The average achieved price across these transactions was £3,825 per square metre (psm).
- 9.86 We are aware of other new-build flatted schemes that have transacted on the peripheries of the towns or that may have transacted near to the town centres prior to January 2018. Whilst these schemes can provide a rough guide of what values town-centre property could achieve, it is not always the case that there will be demand for central locations when estate-style housing is available in the surrounding area at affordable prices, or with features such as parking and outdoor space. We provide detailed analysis of the local markets and consider such matters in the market reports provided in **Appendix F**.

New-Build Flats Asking Values

- 9.87 Figure 97 summarises the asking prices for new-build flats across the town centre residential markets. An analysis of individual schemes and listings is provided in **Appendix F**.

Figure 97. Town Centre New-Build Flats Listings

Town Centre	1-Bed Flat No. of Listings	1-Bed Flat Asking Prices	1-Bed Flat Size (sq m)	1-Bed Flat Average £psm	2-Bed Flat No. of Listings	2-Bed Flat Asking Prices	2-Bed Flat Size (sq m)	2-Bed Flat Average £psm
Hailsham	2	£140,000 - £159,950	47	£2,979	2	£184,950 - £220,000	n/a	n/a
Uckfield	0	-	-	-	0	-	-	-
Crowborough	0	-	-	-	8	£250,000 - £285,000	61 – 95	£3,698
Heathfield	2	£165,000 - £195,000	67	£2,910	1	£165,000	52.9	£3,119
Polegate	0	-	-	-	0	-	-	-

Source: Land Registry, 2021.

- 9.88 Availability across the town centres is varied. Both Uckfield and Polegate do not have any listings within their town centres, whilst Heathfield only has two listings. Crowborough only has listings for 2-bed flats whilst Hailsham has two listings for 1- and 2-bed flats respectively.
- 9.89 Values in Heathfield for new-build 1-bed flats appear to be slightly higher than those in Hailsham although the units being marketed in Heathfield are considerably larger. Values in Crowborough for 2-bed flats also appear to be higher than those in both Hailsham and Heathfield.

New-Build Housing

- 9.90 We have also analysed the market for new-build housing (detached, semi-detached and terraced) in the town centres. Again, we have focused on transactions and listings that have occurred in and around the town centre. We are aware of schemes and transactions that have occurred in on the peripheries of the town or prior to January 2018 and these developments are analysed in greater detail in **Appendix F**. To summarise, there is residential development occurring on the peripheries of the majority of towns, and almost all development is for larger semi-detached and detached housing. As identified in our agent consultation, buyer preference appears to be for larger housing types rather than flatted or terraced housing in the town centre. This would explain the significantly higher volumes of residential development occurring on the town peripheries in comparison to town centres.
- 9.91 Figure 98 overleaf provides a summary of new-build housing transactions in and around the town centres by housing type since January 2018.

Figure 98. Town Centre New-Build Housing Transactions by Type

Town Centre	Detached No. of Transactions	Detached Achieved Price	Detached Size (sq m)	Detached Av. £psm	Semi-Detached No. of Transactions	Semi-Detached Achieved Price	Semi-Detached Size (sq m)	Semi-Detached Av. £psm	Terraced No. of Transactions	Terraced Achieved Price	Terraced Size (sq m)	Terraced Av. £psm
Hailsham	0	-	-	-	0	-	-	-	5	£202,950 - £259,950	59 – 90	£3,306
Uckfield	0	-	-	-	0	-	-	-	0	-	-	-
Crowborough	0	-	-	-	0	-	-	-	1	£380,000	95	£4,000
Heathfield	0	-	-	-	0	-	-	-	0	-	-	-
Polegate	0	-	-	-	0	-	-	-	0	-	-	-

Source: Land Registry, 2021

9.92 Figure 98 shows that the only new-build housing transactions that have occurred since January 2018 were in Hailsham and Crowborough. These transactions occurred at Hurst Park and Warmington Mews respectively.

9.93 The lack of activity in the housing market across the town centres since January 2018 suggests that there is a lack of demand for town-centre living in Wealden District; this has been verified via our consultations with local residential agents that is discussed further in this chapter.

New-Build Housing Asking Prices

9.94 Figure 99 provides a summary of new-build housing stock available in and around the town centres.

Figure 99. New-Build Housing Stock Sale Listings

Town Centre	Detached No. of Listings	Detached Asking Price	Detached Size (sq m)	Detached Av. £psm	Semi- Detached No. of Listings	Semi- Detached Asking Price	Semi- Detached Size (sq m)	Semi- Detached Av. £psm	Terraced No. of Listings	Terraced Asking Price	Terraced Size (sq m))	Terraced Av. £psm
Hailsham	3	£360,000 - £399,995	n/a	n/a	2	£327,950 - £335,000	n/a	n/a	0	-	-	-
Uckfield	0	-	-	-	0	-	-	-	0	-	-	-
Crowborough	0	-	-	-	0	-	-	-	0	-	-	-
Heathfield	0	-	-	-	0	-	-	-	0	-	-	-
Polegate	0	-	-	-	0	-	-	-	0	-	-	-

Source: Rightmove, 2021.

9.95 The only sale listings for new-build housing in and around the town centres were in Hailsham. These listings are for properties at Burfield Grange and Ambersey Green.

9.96 The lack of new-build housing listings, combined with the lack of achieved transactions in these locations suggests that there may either be a lack of demand or supply for town centre residential properties across the town centres.

Retirement Living

9.97 We have reviewed existing stock and value levels for retirement living accommodation across the town centres to identify the levels of supply and demand in the current market. We have also undertaken consultations with national retirement living operators to identify if these suppliers would consider any of the town centres as viable locations for new development. This also enables us to understand their requirements in terms of desired location, accessibility and demographics.

Existing Facilities

9.98 Figure 100 displays the number of existing retirement living facilities across the high order towns. Note that these figures include facilities that would be considered as outside the town centre.

Figure 100. Existing Retirement Living Facilities

Town	No. of Existing Retirement Living Facilities
Hailsham	13
Uckfield	8
Crowborough	19
Heathfield	9
Polegate	8

Source: HousingCare.org, 2021.

9.99 Crowborough has the highest number of existing facilities that offer retirement living accommodation. All of the towns have a variety of different facilities that offer differing levels of care to the elderly.

Retirement Living Achieved Values

9.100 Figure 101 displays achieved transactions for retirement living facilities across the high order town centres since January 2018. We note that these transactions include both new-build and

second-hand retirement facilities data. Some of the schemes may also be located outside of the defined 'town centre'.

Figure 101. Retirement Living New-Build and Second-Hand Sale Transactions

Town Centre	Flats No. of Transactions	Flats Achieved Price	Flats Size (sq m)	Flats Av. £psm	Terrace No. of Transactions	Terrace Achieved Price	Terrace Size (sq m)	Terrace Av. £psm	Semi- Detached No. of Transactions	Semi- Detached Achieved Price	Semi- Detached Size (sq m)	Semi- Detached Av. £psm
Hailsham	32	£201,950 - £326,950	53 - 99	£3,661	0	-	-	-	0	-	-	-
Uckfield	16	£70,000 - £195,000	43 - 54	£2,649	0	-	-	-	0	-	-	-
Crowborough	9	£230,000 - £450,000	53 - 91	£4,512	0	-	-	-	0	-	-	-
Heathfield	7	£67,500 - £77,000	43 - 45	£1,690	2	£150,000 - £160,000	70 - 76	£2,123	4	£231,000 - £245,000	77 - 80	£3,118
Polegate	16	£87,500 - £140,000	44 - 66	£2,265	0	-	-	-	1	£165,000	47	£3,511

Source: Land Registry, 2021

9.101 As shown in Figure 101, there have been a number of transactions in the towns for retirement living properties. The majority of transactions were for flatted properties. Elderly buyers typically prefer smaller flatted or terraced properties as they are often looking to downsize from a detached or semi-detached house to a more manageable living space.

9.102 Values in Crowborough for flatted retirement living properties appear to be significantly higher than the other towns. This is in line with the higher market sale property values achieved in Crowborough, relative to the other towns.

Retirement Living Asking Prices

9.103 We also analysed retirement living asking prices in the towns. We have undertaken this analysis to establish whether there have been any significant price changes in these markets, as well as to establish the quantum and quality of stock currently available. A summary of our findings are displayed in Figure 102. We would note that this data may include new-build and second-hand properties that may also be considered as outside of the 'town centre'. In some cases where there are a large number of listings, we analysed a representative sample of the listings.

Figure 102. Retirement Living Asking Prices

Town Centre	Flats No. of Listings	Flats Asking Price	Flats Size (sq m)	Flats Av. £psm	Terraced No. of Listings	Terraced Asking Price	Terraced Size (sq m)	Terraced Av. £psm	Semi- Detached No. of Listings	Semi- Detached Asking Price	Semi- Detached Size (sq m)	Semi- Detached Av. £psm
Hailsham	17	£90,000 - £300,000	n/a	n/a	0	-	-	-	0	-	-	-
Uckfield	32	£90,000 - £300,000	43 - 97	n/a	0	-	-	-	0	-	-	-
Crowborough	9	£75,000 - £150,000	41 - 55	£2,312	0	-	-	-	0	-	-	-
Heathfield	12	£160,000 - £190,000	45 - 50	£3,597	0	-	-	-	0	-	-	-
Polegate	0	-	-	-	0	-	-	-	0	-	-	-

Source: Rightmove, 2021

9.104 The only available retirement living units for sale across all of the town centres were flatted units.

9.105 Asking values for retirement living units appear to be in line with the achieved values, with some asking prices appearing to be slightly higher than the achieved values. This would suggest that values for retirement living facilities have increased in line with general house price growth in the market.

Residential Agent Consultation

9.106 We have consulted local residential agents to gain a better understanding of the type of demand present in the town centre residential property markets across Wealden District. This also allows us to identify the types of buyers that are active in the market as well as any types of property that may be particularly popular. More detailed analysis on our agent consultation for individual towns can be found in **Appendix F**.

9.107 We summarise our general findings below:

- Agents stated generally that housing markets in the high order towns are active. Demand increased throughout the Covid-19 pandemic as a result of the Stamp Duty Holiday and there had been strong price growth as a result of this increased demand. Whilst demand is 'cooling off' as a result of the Stamp Duty Holiday being phased out, values for all property types remain strong.
- The most popular types of property across all of the towns tend to be detached and semi-detached properties. Buyers have shown a preference for these larger types of accommodation on the town fringes rather than town centre living in smaller terraced or flatted housing. Detached and semi-detached houses tend to provide parking and a garden and, according to multiple agents, are often priced at a similar level to schemes in the town centre.
- There is a wide variety of purchasers active in the market. Multiple agents reported a strong mix of first-time buyers, elderly downsizers and cash buyers in the market. One increasingly prevalent group are young professional families looking to move out of London and commute in for work. These buyers tend to look for detached or semi-detached properties in green areas within reasonable proximity to transport links. Crowborough and Uckfield provide easy access to London and are therefore favourable amongst these types of buyers when combined with the affordable property prices in the

area (in comparison to London).

- Agents were uncertain as to whether there would be strong demand for town centre living if such development were to come forward. Buyer preference for town fringe living in larger accommodation may limit the demand for flatted or terraced accommodation in the town centres, especially given that these new-build properties would likely be priced at a similar level to larger town fringe properties.
- Agents stated that all towns had strong demand for retirement living. Wealden's elderly population means that this market is active, with such properties being regularly transacted. These types of buyers tend to favour more manageable living spaces, such as flats or terraced houses. Our consultation with a national-scale retirement living operator identified that they are actively looking for sites in all of the towns with the exception of Hailsham (as they already have an existing interest in this town centre).

Residential Markets Summary

Hailsham

- 9.108 Whilst there has been significant activity in the market-sale of residential properties in Hailsham and developers are actively delivering new development, it is notable that this activity is focussed on estate housing beyond the town centre. There is a good level of demand for homes in Hailsham, but buyers are typically families looking for smaller houses with gardens rather than first-time buyers seeking urban flats. Indeed, no new flatted development has occurred in the centre in recent years. This market is also catered to in Eastbourne, where 40% of development is flatted and there are multiple rail stations that provide better transport connectivity for purchasers.
- 9.109 Agents suggest that increasing the demand for town-centre living could be challenging. Typically, buyers look to locate near bars, restaurants and other amenities. However, the town lacks this type of offering. The affordability and size of town fringe living compared to the relatively higher pricing of town centre living may also prove challenging.
- 9.110 Hailsham is already established as a retirement living location. There are numerous schemes and national operators involved in delivering further units. Agents have suggested that current supply may be able to meet short-term supply although it is likely that retirement living may represent an opportunity for development in the centre in the longer term also.

9.111 The town has also not seen a significant increase in demand from commuters moving out of London. The absence of a railway station in the town means it is not seen as a particularly viable location for young professional families looking to travel into London for work.

Uckfield

9.112 The residential market in Uckfield is active. Properties in the town achieve reasonable values and there are a significant number of new-build homes due to enter the market in the next few years due to the large site allocations to the south of the town centre, which are currently coming forward. This may saturate the market in the short-term; however, the phased nature of the development will likely reduce this impact.

9.113 There may be a lack of demand for flatted/terraced residential development around the High Street in Uckfield. Agents stated that purchasers typically look for larger houses on the fringes of the town, rather than town centre accommodation. They also stated that Uckfield's retail and F&B offering was not strong enough to act as a significant marketing feature for any proposed development in the town centre. This observation is evidenced by the absence of any new-build achieved transactions and sales listings in the town centre.

9.114 It is likely that there will be opportunities for retirement living development throughout the plan period. There are already a large number of retirement living facilities in the town, with a number of properties currently available on the market. There is also a healthy demand for retirement living facilities to absorb this supply. One elderly living operator expressed interest in acquiring a site in Uckfield. This scheme would be for retirement living (Use Class C3) or retirement living plus care (Use Class C2). It is therefore likely that there could be opportunities for an additional retirement living facility in Uckfield during the plan period.

Crowborough

9.115 There is strong activity in Crowborough's residential market with reasonable values and a number of new developments coming forward.

9.116 However, there is less take-up in the town centre residential market. Buyers have shown a preference for larger houses on the fringes of the town over smaller flatted/terraced units in the town centre. Agents suggested that the reason for the lack of take-up for new-build flats and terraced houses in the town centre was due to the popularity of these larger housing types in reasonable proximity to the high street at affordable prices.

9.117 There may be potential opportunities for retirement living development in the town centre throughout the plan period. Whilst there are already some provisions of retirement living in the town centre, there have been a number of transactions in recent years, which suggests that the market is relatively active. This was confirmed through our agent consultation and reaffirmed through our consultation with national retirement living operators. One of these operators confirmed that they are actively looking for a site in Crowborough for C2 or C3 use. We therefore anticipate that there is potential for a retirement living facility of this type in Crowborough.

Heathfield

9.118 Heathfield's residential market has seen strong activity in recent years. Values have remained strong throughout the Covid-19 pandemic and there is strong demand for all property types.

9.119 Agents stated that buyer preference is for semi-detached and detached housing with a garden and off-street parking rather than potential town centre residential development, which is unable to offer these amenities. The lack of F&B and comparison retail provisions in the town centre also means that town centre living does not have as much appeal as it would in larger settlements. Any town centre development would also likely be priced at a similar level to a second-hand larger properties outside of the town centre.

9.120 Whilst the other towns typically attract young professional families looking to commute into London, Heathfield has not seen a significant increase in demand from this demographic. Agents suggested this is likely because Heathfield does not have its' own railway station.

9.121 There is a strong market for retirement living properties in Heathfield, with a number of sales transactions occurring for retirement living flats since January 2018. There is also a healthy level of supply in the market, with nine existing retirement living facilities in Heathfield. We received interest from a national retirement living operator who stated that they could be interested in acquiring a site for retirement living (Use Class C3) development. We anticipate that there may be opportunities for retirement living development in the future.

Polegate

9.122 The housing market in Polegate is active. There have been some transactions for all property types in the town centre; however, no sales have occurred on the High Street itself. All of these transactions near the High Street occurred on roads that lead onto the High Street.

9.123 Demand is strongest for semi-detached and detached houses. Semi-detached is the property type that has seen the highest volume of transactions over the past two years and agents reported that this is the property type that they deal with most on a day-to-day basis. There is weak demand for flatted properties. There are currently no new-build flats and only five second-hand flats available for sale in Polegate. There was general consensus amongst agents that demand for this type of property is weaker than semi-detached and detached properties across Polegate. All transactions that have occurred for all property types in the town centre since January 2018 have been for second-hand properties.

9.124 There has been a strong level of activity in the retirement living market in Polegate. Agents stated that these types of properties tend to sell quickly. Buyer preference is for either flats or terraced housing/bungalows. We have also registered interest from a national-scale retirement living operator who has stated that they could be interested in acquiring a site in Polegate. They stated that this interest would be for a bungalow site.

SWOT Analysis

9.125 We present the findings of our town centre market analysis for each town in the form of a SWOT analysis. This looks at the strengths and weaknesses of each of the town centres, as well as the opportunities and threats to the potential future growth of the town centre property markets.

Figure 103. Uckfield SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
• Low vacancy rate on high street retail units. • Good footfall through town. • The station within the town centre generates footfall. • Good transport access. • Widening of pavements has improved pedestrian high street experience. • 1,000+ homes being built near town centre. • Uckfield Farmer's Market provides an attraction that brings footfall into the town centre. • Good evening economy, cinema and nightclub provisions already in the town. • Affluent area. • Strong local business base. • Main retail hub for a large catchment area compared to other towns in Wealden. • The town has an active Town Council and Chamber of Commerce that provides a strong events programme and encourages local businesses to connect and network.	• Low market activity for F&B. • Lack of large-scale convenience retail. Only two existing large-scale operators. • Limited options for a sit-down dining restaurant experience. • No real focal point for public realm offering. • Congested high street, high traffic levels. Made worse by widening of pavements. • Lack of new-build residential activity near to the high-street. • High street is too long. Could result in diluted offer.	• Potential for public-realm investment around the Bellbrook Industrial Park. • Known discount retailers looking for store opportunities in Uckfield. • Demand in general is likely to come from smaller, independent local businesses. • A number of locations in the town centre offer opportunities for redevelopment of both derelict/out-dated properties and public realm improvements.	• Widening of pavements on high street has narrowed the road and increased traffic levels. This may hinder future growth of the high street. • Town not seen as a significant commercial hub, with limited office or retail activity. Large scale occupiers will most likely look towards Royal Tunbridge Wells. • Suggested lack of demand for residential properties around the high street.

Figure 104. Hailsham SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
- Strong convenience offer (and demand from others) - The town centre is well used - The Hailsham Aspires Project – could attract investment and potentially town-centre living - Pavilion Theatre and Cinema - Has retained Prezzo (22 closures in 2021) - The supply of commercial space appears to be meeting demand (although there is a question mark around suitability for national brands) - Leisure centre is well used and new space is likely to improve offer - Demand from independent businesses - Affordability provides opportunities for local businesses - Strong retirement living market - Strong Farmers Market – has bounced back post Covid-19 pandemic - Retail vacancy lower than national averages	- Town Centre is car dominant - Pedestrian movement compromised (car parking) - Many shoppers visit for food shop and do not dwell to use other services - Lack of national comparison occupiers (more likely to be independents than nationals) - Lack of train station (bus service to Polegate could be improved) - Limited evening economy (weak market for restaurants) - People likely to go elsewhere for Leisure offer (Cineworld Eastbourne) - With a new leisure centre potentially coming forward, it is unclear whether there will be demand from commercial gyms (population also an issue) - Unclear that there is currently a market for flatted development in the town (tension with affordable housing on the periphery of the town). - Little demand for town centre office space and limited available office space. - Public realm could be improved / lack of 'focal point' hub.	- Lidl, Aldi requirements (known demand from these operators) - Build on the success of the farmers/street market (covered / extended market – greater permanence) - Encouraging town centre living (either retirement or market) to increase use and investment in the town centre - Improve pedestrian experience - Attract those using the town to use it for more than for a food shop - Can the Leisure Centre be delivered in a way that benefits the wider town centre? - Significant Council land ownership and control – Vicarage Lane in particular - Hailsham Aspires project presents opportunity for step change - Opportunity to create new focal point at Hailsham Parish Church and improve public realm to improve hosting capabilities. - Potential opportunity to develop better links to the popular Cuckoo Trail leisure route & improve footfall.	- Do potential home buyers want town-centre living (especially flats)? - Housing market faces competition with peripheral new-build housing estates - Little to attract those buying homes in the town at present - Provision of new commercial space does not guarantee that it will be occupied. - Commercial rents at a level where new space is not viable (will occupiers pay viable rents for new space or is the market driven by affordability)? - Will new space compete with/dilute the high street (or should there be a focus on consolidation)?

Figure 105. Crowborough SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
• Low vacancy rate of retail units on the high street. • Good footfall through the town. • The Basepoint flexible workspace offer provides office attraction to the town. • Excellent provision of large-scale convenience retailers in the town centre and wider town. • Free and abundant parking. • Good commuting links with London. Attracts commuters (but train station may be too far from the town centre and is not likely to be used). • Popular farmers market that improves footfall through town centre on selected weekends.	• Narrow footpaths and speed of traffic gives a sense of being unsafe. • Some comparison retail offering but nothing significant. Most comparison retail taken by Royal Tunbridge Wells. • Constrained development opportunities. • Gradient of town centre. Also, difficult to navigate. • Lack of evening economy. One pub on high-street and lack of restaurants etc. • No real public realm offering and no focal point to the town. There is also a lack of suitable locations for public realm improvements. • The station is not close to the high street so commuters less likely to spend time within the town centre.	• Increased provision of new-build homes through strategic development areas from 2013 that are coming forward. This could provide increased housing population and subsequent increased demand for comparison services. • Some potential town centre sites that could be redeveloped to provide space for new evening economy provisions. • Providing a more fluid pedestrianised high street via a one-way system could create space for an 'evening-economy' hub. This may also encourage more public realm investment.	• Lack of population means it is unviable for most large-scale operators to move into Crowborough. • Shift towards 'catering-style' units may threaten future of sit-down F&B businesses. • Residential development on previously allocated sites (such as that to the north of the Base Point facility) may impact demand and values for any town centre development. This could reduce demand for town centre living further.

Figure 106. Heathfield SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
• Low vacancy rate amongst high street retail units. • Stronger retail market activity compared to other towns given its size. • Excellent provision of large-scale convenience retailers given the town's size. • Strong activity in the residential market. • Popular farmers market that provides an attraction bringing footfall into the town on selected weekends.	• Lack of comparison retail provisions. • No real evening economy. Majority of existing F&B provisions are takeaway units. • Lower-quality existing retail units. • No real public realm offering. • Lack of new-build residential activity in the town centre. • No train station located in Heathfield, so limited numbers of commuter families moving into the town. • The high street layout is long with no central focal point/hub. This gives a diluted feel to the high street offering.	• Vacant unit on Station Road and rear parking could provide residential development opportunity. • Potential for infill development. • Improve public realm to encourage investment.	• Small population means unviable for most large-scale operators. • Lack of residential development sites and no housing commitments currently in the town centre. • Limited development opportunities. Will require private sector initiative to redevelop existing buildings. • Agents considered public realm investment unlikely to encourage an evening economy.

Figure 107. Polegate SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
• Good footfall through town. Polegate Station's location relative to high street provides focus on the high-street and good transport access. • The majority of existing occupiers are locally based so the town has a strong independent business base with potential for growth.	• Unpedestrianised high street layout and heavy congestion when the station barriers close. • Lack of national scale convenience and comparison offering on the high street. • Lower-quality existing retail & office units. Lack of availability for anything 2,500 sq ft or above. • Lack of evening economy. One pub on high-street and lack of dine-in restaurants etc. Majority of existing offering is 'catering-style' take-away units. • Lack of public realm providing space to gather/meet. • Lack of new-build residential activity near high-street in recent years. • The town does not have its' own leisure centre and has to rely on nearby facilities towards Eastbourne.	• Significant public-realm investment opportunities around the Co-Op/Station. • Potential improved public transport links with Hailsham may bring increased footfall into the town centre. • Significant population within walking distance of the high street. Sizeable population in close proximity is a common requirement amongst retail operators. • Potential role of a Chamber of Commerce (or another partnership-based approach) in the commercial sector could encourage local businesses to advertise themselves further and expand. • Ensuring that new residential development is well-linked to the town centre through a potential s106 agreement to secure infrastructure funding could provide a significant increase in demand for commercial goods and services. • Potential to develop a street market. • Potential to build on the gateway status of the town centre to the South Downs National Park.	• Lack of population means that most large-scale retail operators may not consider Polegate. • There is potential for increased traffic flows through the town if the pending appeal of a recently refused application for over 700 homes in Polegate is successful. With existing train barriers, this could increase congestion and harm pedestrianisation plans. • The potential approval of plans for 8,600 sq m of employment, leisure and educational space could also take footfall away from the town centre if the new facilities compete with the town centre offer and also if connectivity between the new development and the high street is poor. • The proximity of the town to Eastbourne means there is unlikely to be large-scale commercial interest as larger, more appropriate space will always be available in Eastbourne.

Wealden Town Centre Study

Strengths	Weaknesses	Opportunities	Threats
		Potential to improve connections to the popular Cuckoo Trail. This could increase footfall through the town centre.	

10 Policy Recommendations

10.1 In this chapter of the report, and based on our findings in the preceding chapters, we provide commentary and planning policy recommendations for the following issues that will be dealt with by Wealden's new Local Plan:

- Town centre hierarchy;
- Town centre boundaries and primary shopping areas;
- Options to meet any identified floorspace requirements;
- Sequential test recommendation;
- Floorspace thresholds for out of town centre development (the Local Impact Test);
- Additional policy recommendations; and
- Monitoring considerations.

Town Centre Hierarchy

10.2 The brief asks that we consider and identify the town centre hierarchy within the District, including a consideration of neighbouring towns. The PPG sets out that for planning purposes, town centres comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres.

10.3 Annexe 2 of the NPPF defines a 'town centre' as an:

Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

10.4 The adopted Wealden District Core Strategy Local Plan (February 2013) does not provide a retail hierarchy, but does set out a settlement hierarchy for the towns, villages and hamlets in the District as well as considering higher order towns outside of the district.

- 10.5 In that settlement hierarchy, and as described in the health check chapter of this report, Crowborough, Uckfield and Hailsham were identified as district centres, while Heathfield, Polegate and Willingdon, Wadhurst and Forest Row were identified as service centres. Stone Cross was also identified as a service centre. Other settlements with more limited services were identified as either a local service centre, neighbourhood centre or as an unclassified settlement.
- 10.6 Based on the definition of Town Centres as included in the NPPF, we recommend that a simplified town centre hierarchy is introduced, as shown in Figure 108:

Figure 108. Recommended Town Centre Hierarchy

Tier	Centres
Town Centre	Uckfield Hailsham Crowborough Heathfield
District Centre	Polegate Forest Row Wadhurst
Local Centre	For example: Pevensey Bay, Mayfield, Horam, Herstmonceux, Rotherfield

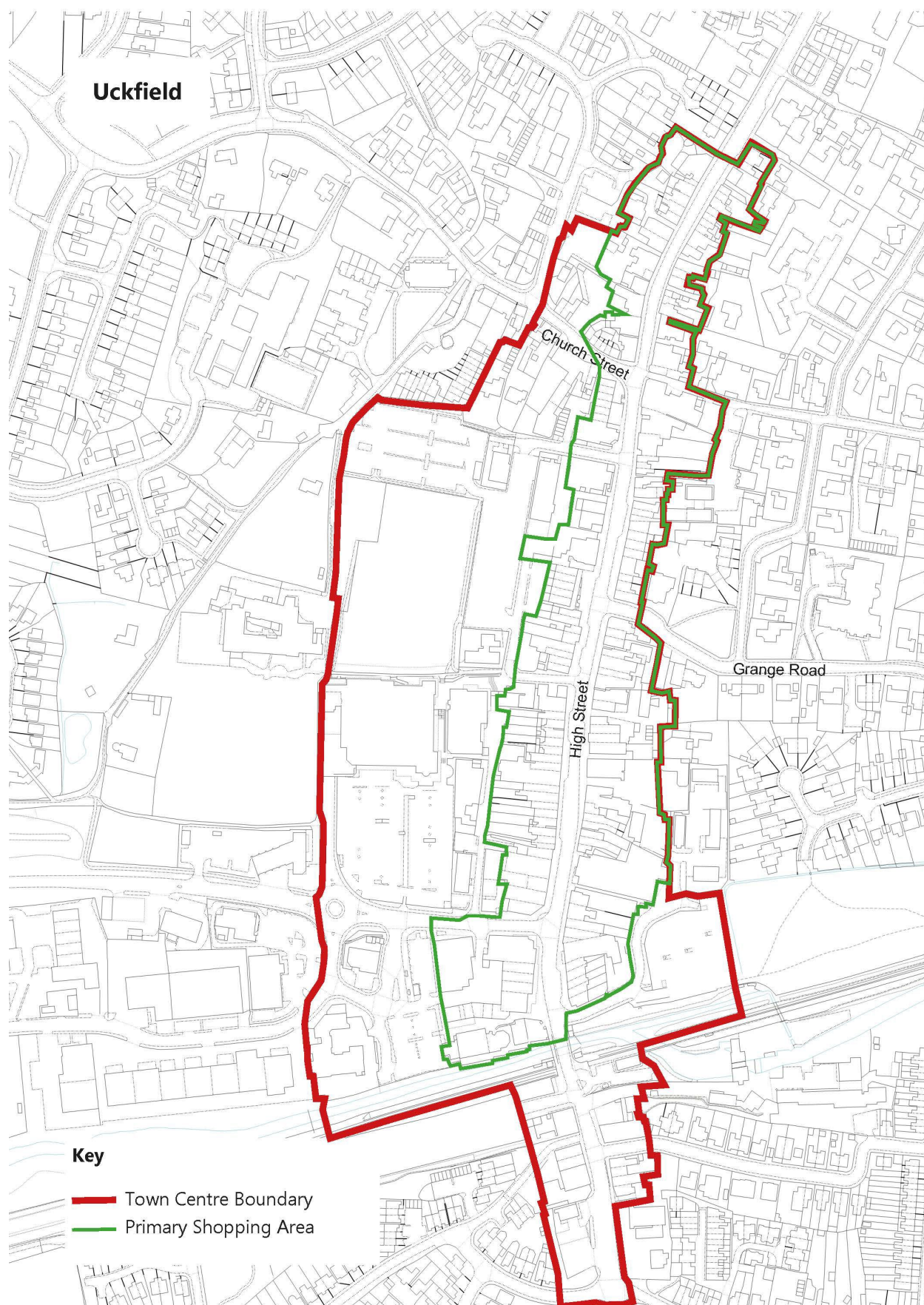
- 10.7 The scope of the health checks have focussed on the role, function and offer of Uckfield, Hailsham, Crowborough, Heathfield, Polegate, Forest Row and Wadhurst centres. Nonetheless, the centres that will fall within the Local Centres category attract a suitable level of convenience and comparison trade in their own right, and continue to provide a valuable local function.
- 10.8 The Council may wish to consider protecting small neighbourhood centres and parades of more than ten⁶⁹ main town centre uses, to meet the needs of their own communities. Such local centres could be included within the town centre hierarchy, so that the centres are afforded the requisite policy protection under the NPPF and in the future emerging Local Plan.

⁶⁹ DCLG publication 'Parades to be Proud of' defines local neighbourhood parades as: 'Typically located in the heart of a residential community, urban and rural, often with around 5-10 units, providing walk in convenience shopping and limited local services.'

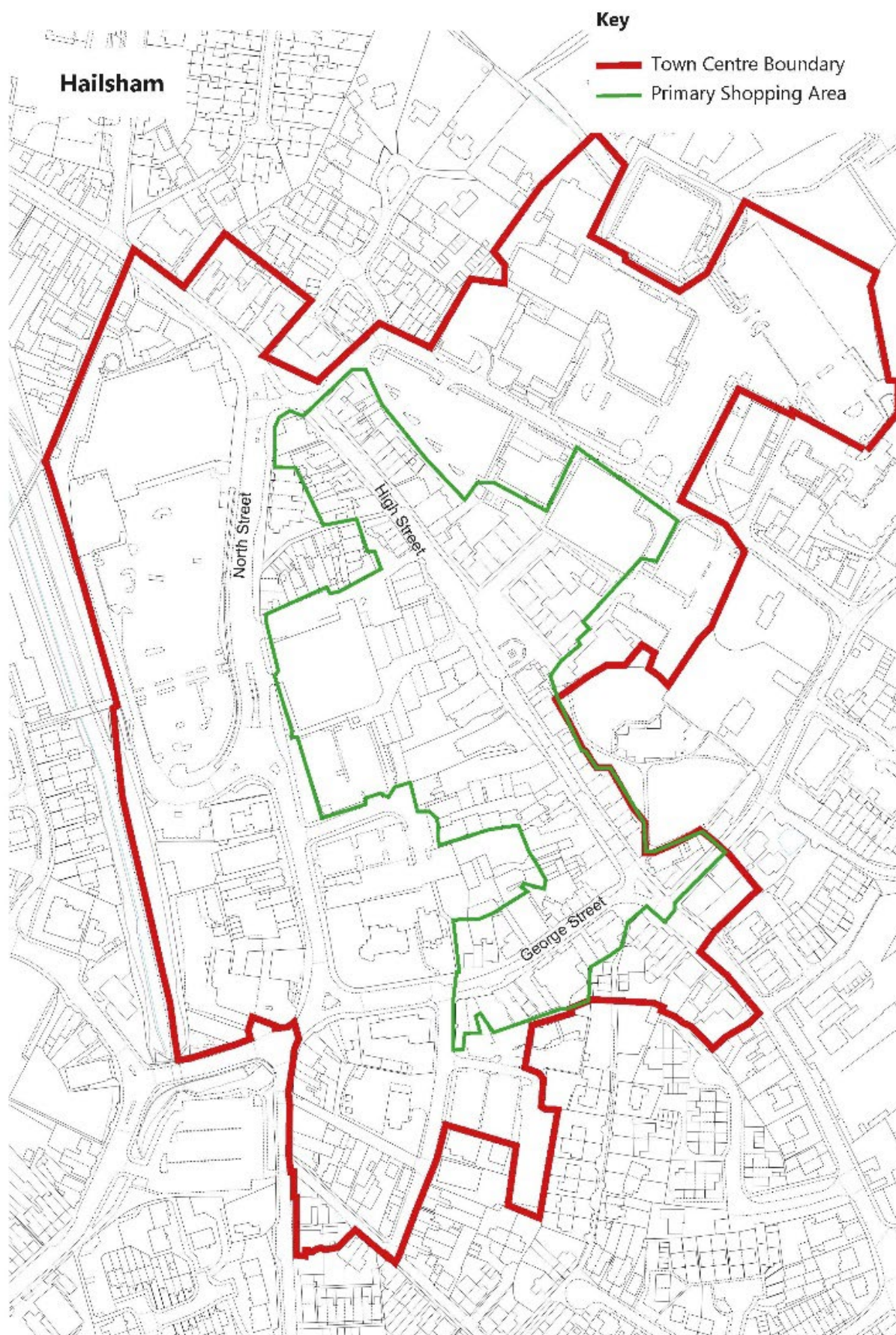
Town Centre Boundaries

- 10.9 As part of this commission and to assist in policy formulation we have considered the extent of town centre boundaries and primary shopping areas for the main town centres in the district.
- 10.10 As described above, the NPPF defines town centres as the *'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area'*.
- 10.11 The NPPF defines a primary shopping area as a *'defined area where retail development is concentrated'*. The primary shopping area is also relevant in establishing what constitutes 'edge-of-centre', and 'out-of-centre', as the 300 metre measurement is calculated from the edge of the primary shopping area.
- 10.12 Using the definitions of a 'primary shopping area' (PSA) and 'town centre', we have provided recommendations for defining the extent of town centre boundaries and primary shopping areas for each of the District's main town centres. In particular, we have contracted areas that are isolated, operate as a distinct separate parade of shops, or do not function as part of the collective retail, leisure, commercial and service offering of 'main town centre uses' that make up the relevant centres. This contraction also responds to the limited overall need for new retail floorspace across the District.
- 10.13 A description of each town centre boundary and justification for these boundaries is included below. Full scale mapping of the recommended boundaries are contained at **Appendix G**.

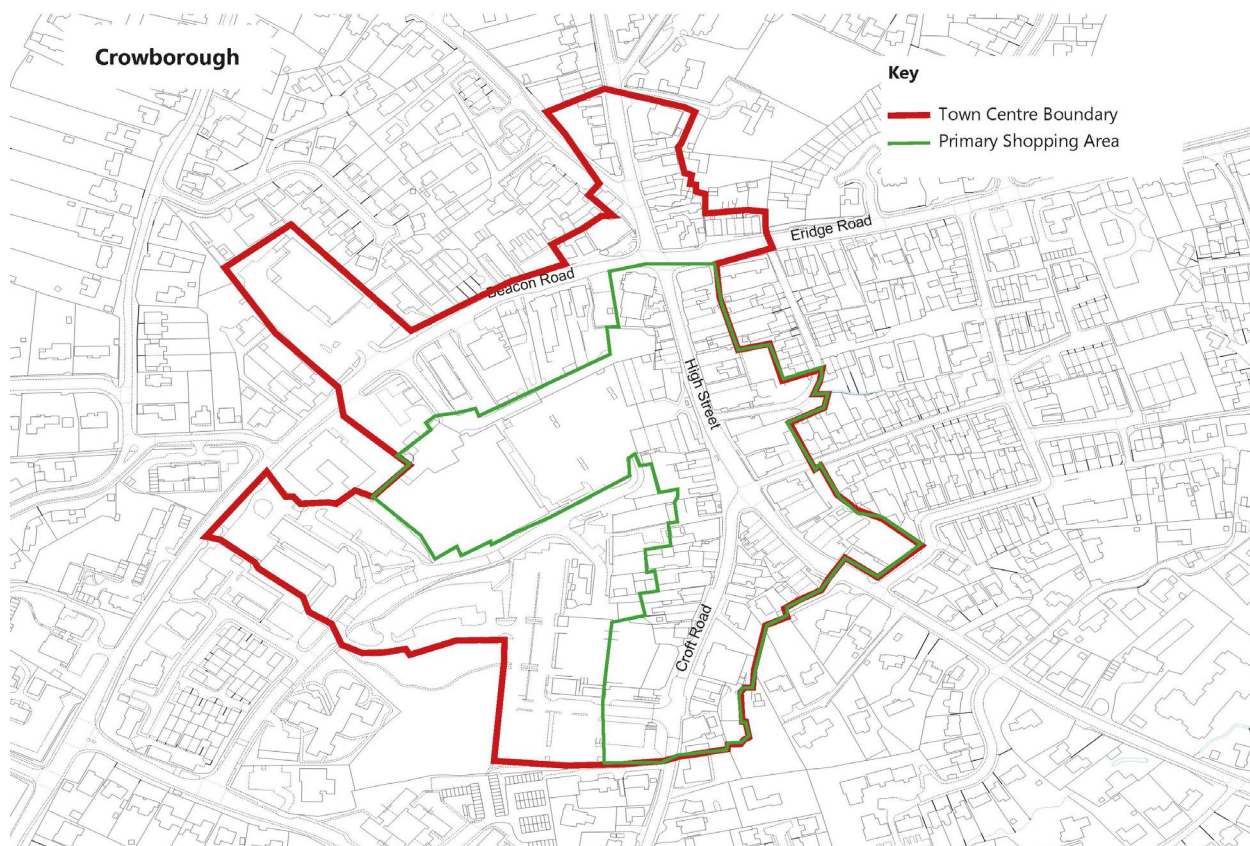
Town Centre	Description
Uckfield	The PSA is comprised of predominantly retail stores, concentrated around the High Street, from the Noble Wines store in the north, to Mill Lane and the railway line in the south. All properties with frontage to the High Street are recommended for inclusion in the PSA. To the south, the PSA includes Bell Walk Shopping Centre, which maintains a partial frontage to the High Street, and ends at the railway crossing; beyond this point, units continue to serve the wider town centre but does not act as part of consolidated and combined core of retail uses. Equally, to the west, the Tesco Superstore and Luxford Fields serve as key attractions to the town centre, but are not well linked to the retail core and are excluded from the PSA. Beyond Luxford Fields, a number of supporting town centre services are also included within the town centre, but are not concentrated within the PSA. To the north and east, both the PSA and town centre boundary end as the proportion of main town centre uses reduces, predominantly for offices and residential dwellings on the edge of the centre. In addition to the PSA, we recommend a slightly larger town centre boundary for Uckfield, which includes the retail units fronting the High Street on the south side of the railway line, the Parish Council offices, the Uckfield Social Club, the Tesco and associated parking and civic centre. Residential dwellings that do not form part of the traditional parade are excluded. Bellbrook Industrial Estate is recommended to be excluded from the town centre boundary as this part of the town was observed as being a separate entity from the PSA, unlikely to draw linked trips and function as an intrinsic part of the centre as a whole.



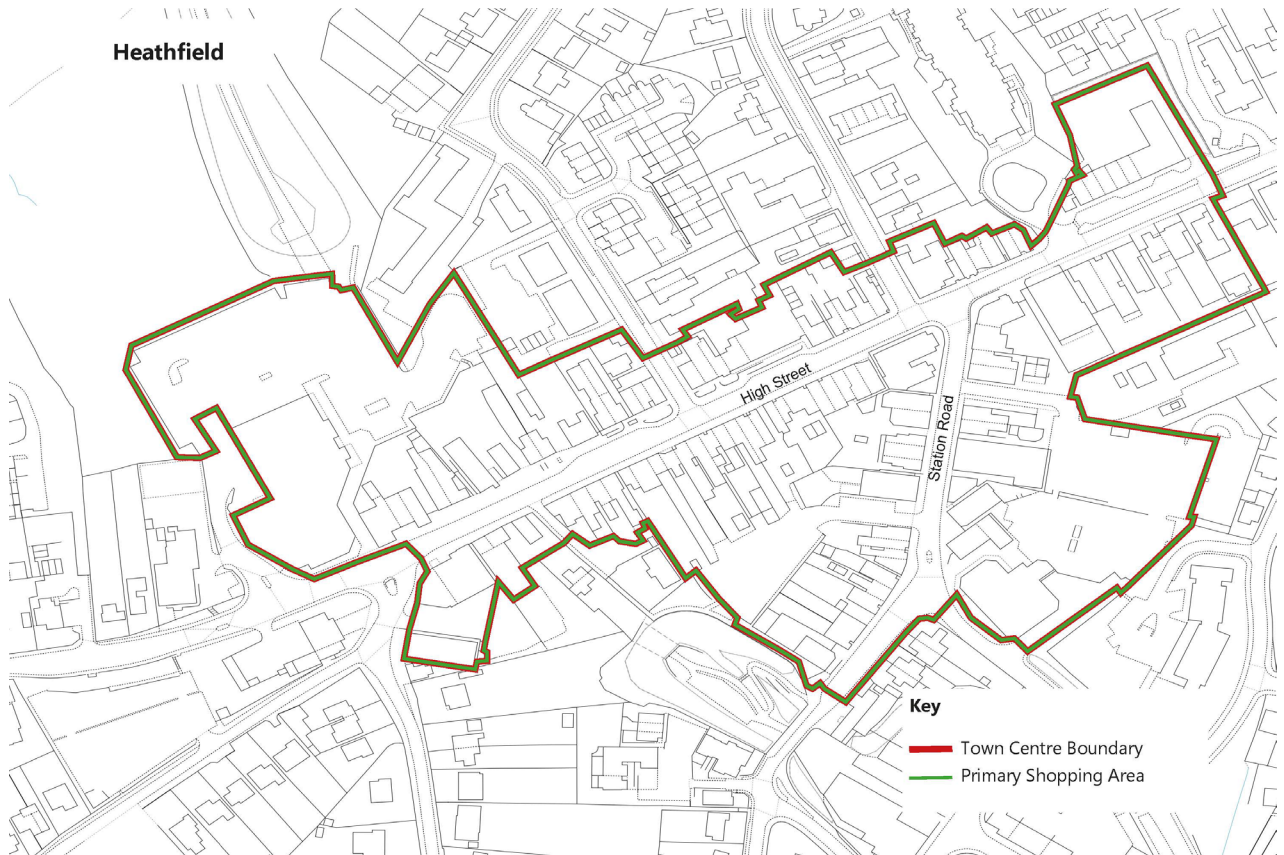
Town Centre	Description
Hailsham	Hailsham's PSA incorporates the units with frontages concentrated along the High Street. The area also includes the Quintin's Centre, Vicarage Field and St Mary's Walk shopping centre. Main town centre uses along George Street are also functionally linked to the PSA and proposed to be included. We recommend the Tesco Superstore and associated parking to the west, High Street units to the north of North Street, Wealden District Council offices and Freedom Leisure Centre, and other units with frontage onto North Street to be located within the town centre boundary, but outside of the PSA. They are typically served by their own car parks, along their own access roads (North Street and Vicarage Lane). Whilst the functions support the wider town centre, they are not directly accessible to the same core of frontages as the PSA and can serve as standalone destinations in their own right. The Cattle Market located on Market Street is not proposed to be included in the town centre boundary. The site is some distance from the central part of the High Street and does not contribute to the daily function of the town centre. The site's exclusion from the boundary would not preclude a regeneration scheme from coming forward that may include town centre uses.



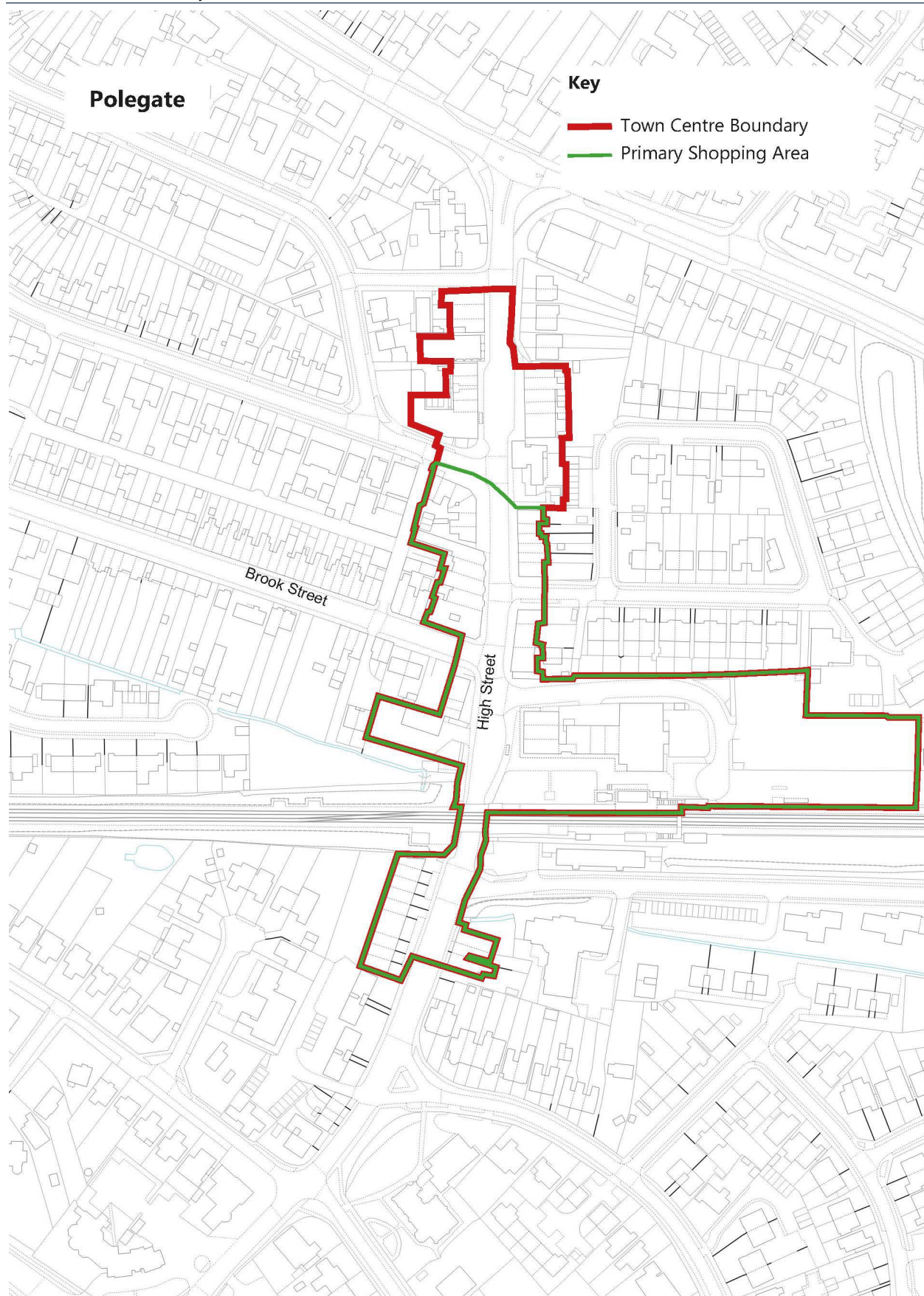
Town Centre	Description
Crowborough	Crowborough's PSA was observed as being primarily focussed around the High Street, from Beacon Road in the north to Croham Street in the south, as well as Croft Road between the High Street and Waitrose/Morrisons Supermarkets, whose car park faces the High Street, which provides a degree of integration between the uses. Units along Beacon Road to the north are less connected to the PSA (and are therefore excluded). While the Waitrose to the south is considered to contribute to the same cluster of uses and forms the southern boundary of the PSA, the access and egress to the car park extend beyond this area, and is considered part of the wider town centre. The town centre boundary is recommended to extend slightly further north than the PSA, encompassing the businesses on the south side of Beacon Road as far west as the Lidl store, and the businesses and stores on Eridge Road as far east as New Road, and London Road as far north as Tester and Jones. The Crowborough Community Centre, library, and the Basepoint office and parking facilities are also included within the town centre boundary, given their function as well as the employee population, which supports the operation of the centre.



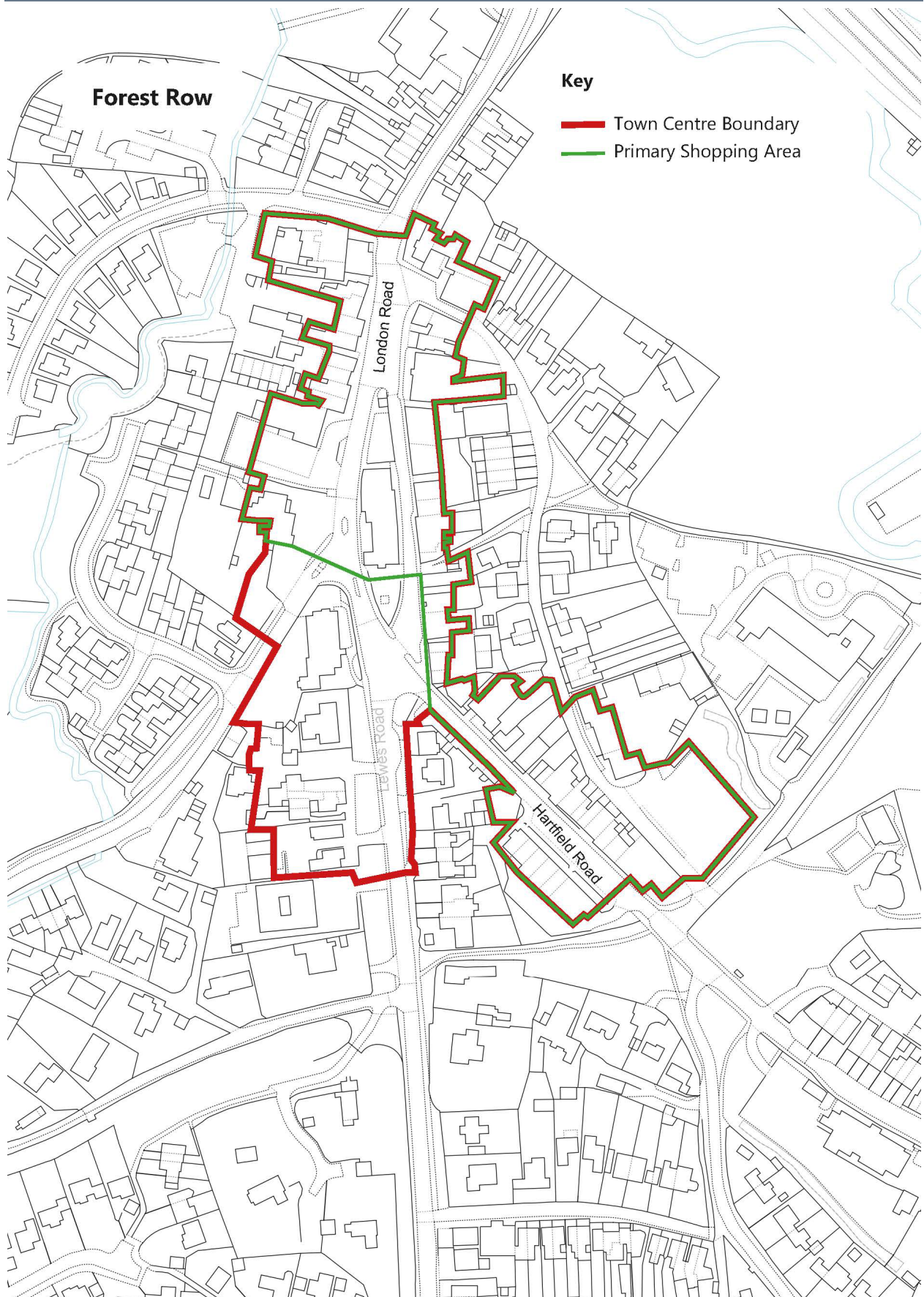
Town Centre	Description
Heathfield	The PSA for Heathfield Town Centre is proposed to be the same as the town centre boundary. The boundary follows the units fronting onto the High Street, from the Co-op Food store in the west, to the Original Factory Shop in the east, all of which are well accessed and form the same concentration of uses. The boundary also proposes to include Station Road from the Sainsbury's at the north, and Station Approach to just north of the Heathfield Skatepark. Whilst this road is at a gradient, it functions as a continuous extension to the High Street. The PSA and town centre boundary exclude the Waitrose, which is further south on Station Road, as this is separated from the core town centre and functions as an edge-of-centre facility.



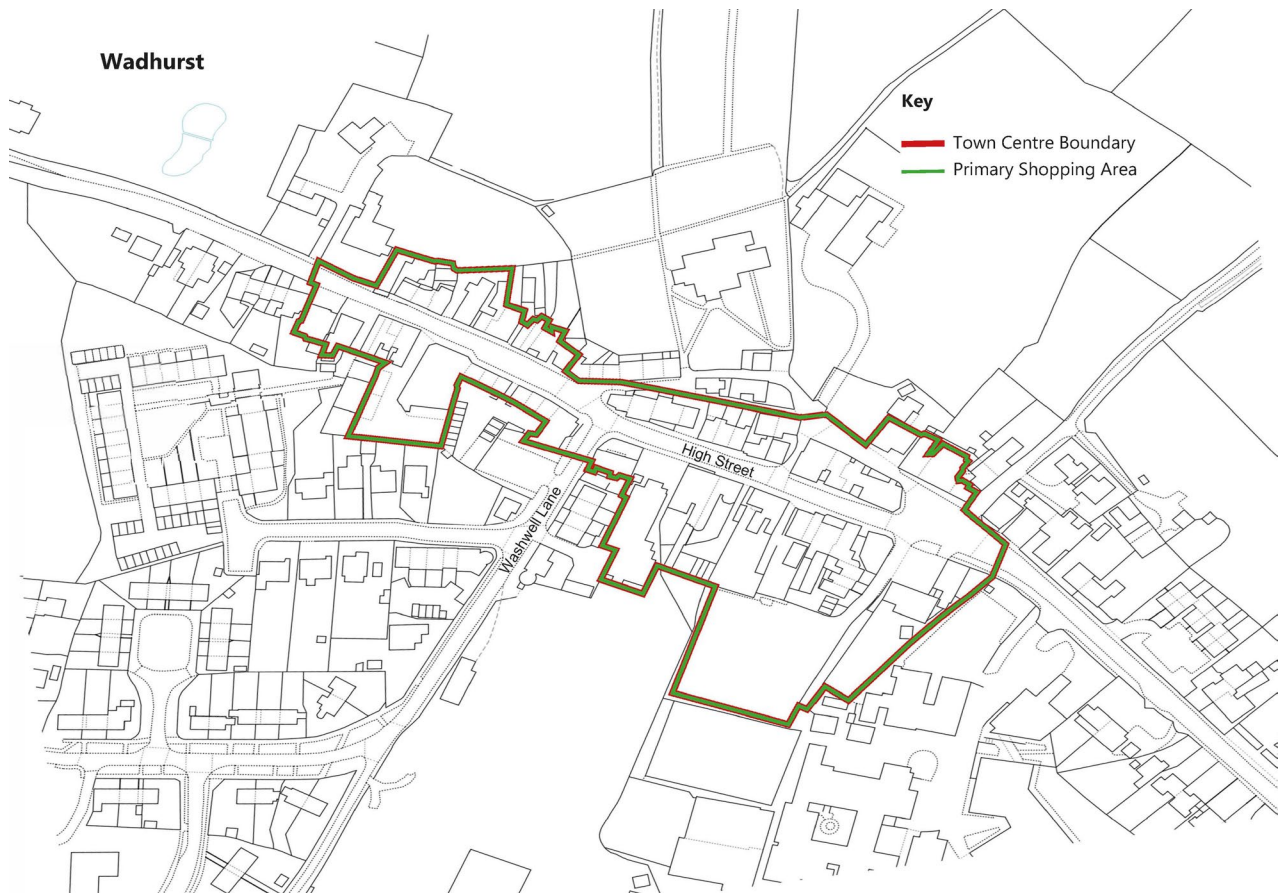
Town Centre	Description
Polegate	The PSA for Polegate Town Centre is largely the same as the town centre boundary. The PSA boundary incorporates the units fronting the High Street from Victoria Road in the north to 33A High Street in the south. It also includes Polegate Train Station and associated town centre car parking behind the Co-Op foodstore. The uses become less retail focussed to the north of Victoria Road, and this concentration of more service oriented units are considered to form part of the wider town centre boundary, but not the PSA. While there are some retail units of the defined town centre boundary fronting Station Road, these were considered to be disjointed from the remainder of Polegate's core retail offer and have therefore been excluded from the recommended boundaries.



Village Centre	Description
Forest Row	Forest Row's PSA is considered to include the units fronting London Road between the junction with Prior Road in the south and Riverside in the north, and the units with frontage to Hillside. It also includes the units fronting Hartfield Road between Lewes Road and Station Road that function as the same concentration of uses. In addition, the town centre boundary is recommended to extend slightly further, to also include those units on the western side of Lewes Road south of the Holy Trinity Church that also serve the wider town centre. The PSA and town centre boundaries exclude retail units that are located further south east along Hartfield Road, as these were clearly separated from the core retail centre by the Forest Row Village Green. It also excludes office blocks to the north east of the Lower Road Car Park, as these sites do not make an active contribution to the function of the town centre.



Village Centre	Description
Wadhurst	The PSA for Wadhurst Village Centre is proposed to be the same as the centre boundary, as we do not identify a specific distinction in how the uses function across this smaller centre. The core retail offer is focussed around the High Street, broadly between 1 High Street to the west, and Blacksmith's Lane in the east, providing a distinct concentration of main town centre uses. The boundary also incorporates the Wealden Car Park to the south of the High Street, which serves the majority of the units and functions as an extension of the centre.



Options for Identified Floorspace Requirements

- 10.14 In quantitative retail terms, our assessment of convenience goods identified a negative capacity in 2021, growing to between 3,300 sq m and 4,800 sq m by 2039. In comparison goods terms, we also found a negative capacity in the early stages of the plan period to 2031, before rising to between 1,300 sq m and 1,800 sq m by 2039.
- 10.15 Nonetheless, given the current economic uncertainties and, more relevantly, pressures on the retail sector, we would stress the need to treat long-term forecasts with caution. As highlighted within the PPG⁷⁰: *“Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.”* (our emphasis)
- 10.16 Additionally, as we have previously noted, capacity does not equate to need. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such as any residents’ dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground from our health check work and stakeholder engagement. Fundamentally, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.
- 10.17 Not only did local agents suggest that there was sufficient space available at present to meet current levels of operator demand, but responses from the public surveys identified that the number of vacant units, general upkeep and investment in existing units and undeveloped sites detracted from the overall appeal of Wealden’s centres.
- 10.18 Any consideration of allocations for new retail floorspace should take into account the assessment of the performance, vitality and viability of the qualitative health of a centre to ensure that any identified capacity meets both a quantitative and qualitative need.
- 10.19 As such, whilst we have identified a quantitative capacity for new convenience and comparison goods floorspace, we do not consider there to be a distinct need, particularly one that would specifically justify out-of-centre allocations at this stage. The identified floorspace capacity should be used to bolster existing or proposed stores within existing centres in the retail hierarchy. We therefore do not recommend that the Council seek to specifically allocate sites for new retail or commercial leisure facilities through the emerging Local Plan.

⁷⁰ (Town Centres and Retail) Planning Practice Guidance, Paragraph: 004, Reference ID: 2b-004-20190722

Floorspace Thresholds

- 10.20 In accordance with the NPPF, retail and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by paragraph 90 of the NPPF.
- 10.21 Where appropriate, Local Planning Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the PPG⁷¹:
- scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - likely effects of development on any town centre strategy; and
 - impact on any other planned investment.
- 10.22 The Council's previous Retail and Town Centre Study (2016) (Stage 3, Options and Recommendations) recommends a locally set threshold of 350 sq m (gross) for new retail developments outside of the District's town centre boundaries. This is primarily based on the scale of small format retail stores operated by the national multiple convenience retailers, though consideration is also given to modern town centre comparison goods formats.
- 10.23 In addition to the guidance within the PPG, in order to robustly test and justify local thresholds, we have considered the overall scale and draw of the centre, the number of available opportunity sites and market patterns to establish what scale of proposal would be likely to impact upon the vitality and viability of the centre.
- 10.24 Where Experian Goad data is available, we have calculated the average size of occupied town centre units across the relevant centres. The average unit size within Wealden's centres is 174 sq m and the median is 90 sq m, with units ranging from 10 sq m to 4,630 sq m. The average retail unit across the District (including vacancies) is slightly larger, measuring 239 sq m.
- 10.25 Notwithstanding the relative resilience of Wealden's centres as a whole, we are cognisant of the potential for the draw of the regional centres surrounding the District to continue to cumulatively 'chip away' at the vitality and viability of Wealden's centres. In light of the above, it is our view that

⁷¹ (Town Centres and Retail) Planning Practice Guidance, Paragraph: 015, Reference ID: 2b-015-20190722

- retail developments falling below the current national threshold of 2,500 sq m have the potential to impact on the health of all these Town Centres and that a locally set threshold would be justified.
- 10.26 We have also had regard to precedent set through recent appeal decisions. Noting the average size of units identified above, recent decisions are relevant in highlighting cases where proposals for smaller units may result in an adverse impact on a centre.
- 10.27 Whilst the significance of levels of impact on town centres should be considered as a matter of fact and degree in each case, it is nonetheless notable that planning appeals in Luton Borough (ref: APP/B0230/A/13/2203864) and the London Borough of Tower Hamlets (APP/E5900/A/14/2217680) have been dismissed by the Secretary of State for retail proposals of just 121 sq m and 261 sq m, respectively. Whilst we would not necessarily recommend adopting a local threshold as low as the appeal cases referenced, it is indicative of the potential impact of smaller units in out-of-centre retail park locations that can be seen to compete directly with the town centre offer.
- 10.28 We therefore conclude that the centres across the District are potentially vulnerable to competing edge-of-centre and out-of-centre retail developments that would jeopardise the vitality and viability of the centres.
- 10.29 As such, we agree with the previously recommended flat locally set threshold of 350 sq m (gross) across the District.
- 10.30 This threshold would capture larger convenience retailers, whilst avoiding placing an undue burden on smaller stores and extensions, as well as the majority of comparison goods stores likely to trade from edge and out-of-centre locations that would have the potential to generate a cumulative draw.
- 10.31 We would stress that whilst a locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed.
- 10.32 The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

Sequential Test Recommendations

- 10.33 As summarised in Chapter 2, the sequential test forms part of the NPPF and we would suggest that any future town centre policies reflects the requirements of the NPPF on the sequential test. Namely, the sequential test should only apply to applications, which are neither in an existing centre nor in accordance with an up-to-date plan; and to reflect the fact that it is not applied to applications for small-scale rural offices or other small-scale rural development.
- 10.34 Whilst the specifics of what would be considered small-scale for such an application should be assessed on the basis of the context of the surrounding area, we would expect this to be smaller than the recommended local impact threshold of 350 sq m, and closer to the median unit size in Wealden's centres of 90 sq m in order to avoid frustrating the purpose of the sequential test. Whilst the facts and degrees of each application should be assessed on their own merits, we would encourage the Council to take a proportionate view of the requirements for a sequential test in such cases.

Additional Policy Considerations

- 10.35 Building on the findings in Chapter 9, flexible working practices and new formats should be encouraged through planning policies supporting the amalgamation or sub-division of existing town centre units and workspaces (where such development results in little loss of net floorspace, but results in a better standard of retail or office accommodation etc.) to encourage investment. Where developments within the town centre are to be carried forward, we would suggest a flexible approach to the provision (or reprovision) of retail floorspace, reflecting the fact that changes of use across Use Class E are no longer defined as development.
- 10.36 Nonetheless, Class E of the Use Class Order introduces a situation that will enable retail uses to occupy non-retail Use Class E premises in out of centre locations, circumventing any relevant 'town centre first' policies. As such, and where there is a risk that an alternative use within Use Class E (such as retail) would impact on the health of surrounding centres, the Council may wish to attach conditions to the grant of planning permission in out of centre locations to restrict the use to that applied for.
- 10.37 Going forward, it is recommended that the Council should maintain and monitor changes of use identified through Permitted Development Rights in order to understand the potential impact on town centres. The Council may wish to consider aspects of this Study that would form part of future evidence base for any Article 4 directions for Permitted Development Rights that would result in the loss of Use Class E floorspace, particularly with regards to the vitality and viability of the town

centres.

- 10.38 We would also suggest that the Council considers the suitability of adopting a policy that would assist in enabling the re-occupation of longstanding vacant units in the centres that may no longer be fit-for-purpose as retail units. Such vacant units may benefit from change of use to an alternative town centre use that would support the overall vitality and viability of the centre (including those outside of Use Class E, such as pubs, bars, cinemas and music venues). Such a policy could require evidence of a continuous period of vacancy and marketing (for example over an 18-month period) demonstrating that the unit does not have a realistic prospect of being occupied in its current use and would benefit from occupation as an alternative main town centre or residential use. This would have the added benefit of consolidating the retail provision where it is most in demand, ensuring that the town centre remains competitive.
- 10.39 Policy support should be provided for 'meanwhile' uses to temporarily occupy vacant units by occupiers seeking to test new business concepts, pop-up stores and event spaces where they support the vitality and viability of the town centre. Other complimentary initiatives that could benefit from policy support could include the construction of click and collect 'hubs' or lockers, and the use of outdoor space for public events (as recently consulted on as a Permitted Development Right⁷²).

Monitoring Retail Health

- 10.40 Nexus carried out town centre health checks across Wealden in July 2021. These exercises were completed following the resumption of trading at retail stores following successive 'lockdowns' across 2020 and 2021 and social distancing measures associated with the Covid-19 pandemic.
- 10.41 Notwithstanding our up-to-date empirical evidence, the global and UK economy is undergoing a significant change at the time of writing, on the back of the Covid-19 pandemic, and the impact of Brexit, which is not yet fully known. Due to the changing circumstances affecting both retail and leisure markets during the course of 2020 and 2021, we recommend that the Council seeks to monitor the overall situation regarding its retail centres carefully. The Council may seek to put in place a further 'light touch' review of both the health of its centres, and the prevailing economic data available, to support the emerging Local Plan ahead of an Examination in Public.

⁷² Government launches public consultation to make outdoor measures for high streets permanent, September 2021

10.42 Additionally, as previously referenced, the Council may wish to monitor the proportion of commercial (Use Class E) floorspace lost from town centres through Permitted Development changes, in order to inform and support any future strategies for responding to these Permitted Development Rights.

Glossary of Terms

Bulky goods:	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display. <i>Source: Planning Portal</i>
Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. <i>Source: Planning Portal</i>
Comparison Goods:	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.) <i>Source: Planning Portal</i>
Convenience Goods:	Everyday essential items, such as food. <i>Source: Planning Portal</i>
Edge-of-Centre:	For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. <i>Source: NPPF</i>
Expenditure per Capita:	The amount of money spent on retail goods per person in each Zone across the Study Area.
Expenditure:	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
Experian Goad:	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.
Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
Financial & Business Services:	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. <i>Source: Experian Goad</i>

Floorplate:	Defined as the physical rentable area over a single floor; sometimes called the footprint.
Goad Plans:	A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations. <i>Source: Experian</i>
Independent Retailers:	Retailers with less than ten outlets/ stores. <i>Source: Experian</i>
Leisure Services:	An Experian Goad category for town centre leisure units, which includes bars, cafes, cinemas, nightclubs, takeaways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs. <i>Source: Experian Goad</i>
Main Town Centre Uses:	Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities). <i>Source: NPPF</i>
Market Share:	The proportion of residents that visit a particular retail destination, derived from household survey results.
National Multiple:	Defined as retailers with ten or more outlets/ stores. <i>Source: Experian</i>
Prime Unit:	'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property. <i>Source: Colliers</i>
Primary shopping area:	Defined area where retail development is concentrated. <i>Source: NPPF</i>
Retail Floorspace:	Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas). <i>Source: Planning Portal</i>

Retail Impact:	The potential effects of proposed retail development upon existing shops. <i>Source: Planning Portal</i>
Retail Services:	An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents. <i>Source: Experian Goad</i>
Sequential Approach:	A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites. <i>Source: Planning Portal</i>
Sales Density:	Turnover, per square metre. Various retail planning sources such as GlobalData UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or 'benchmark') sales densities for national multiple convenience retailers.
Special Forms of Trading:	Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. <i>Source: Experian</i>
Study Area:	The geographical area where the household survey is carried out, based on postal sectors that make up the 9 Zones that cover Wealden District and its surrounding hinterland.
Trade draw:	The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas. <i>Source: PPG Paragraph: 018 Reference ID: 2b-018-20190722</i>
Turnover:	Amount of sales per unit area of retail floorspace. <i>Source: Planning Portal</i>
Town Centre:	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres. <i>Source: NPPF</i>



Nexus Planning

London

Holmes House
4 Pear Place
London SE1 8BT

T: 020 7261 4240

nexusplanning.co.uk