Testing of Retail Scenarios for Bexhill

Rother District Council

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator. This document must only be treated as a draft unless it is has been signed by the Originator and approved by a Director or Associate.

DATE	ORIGINATORS	APPROVED
13.8.10	Andrew Jackson Planning Director	David Napier Planning Director

Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

1.1 GL Hearn is instructed by Rother District Council to provide retail planning advice in respect of potential foodstore development and redevelopment proposals at Bexhill.

1.2 The details of our instruction are set out in the Council's Brief (see **Appendix A**). In summary, we are advising upon the sequential approach and retail impact upon Bexhill town centre which would arise from a number of different foodstore development scenarios, which have been the subject of retail operator/developer interest. This interest has been focused upon Beeching Road Industrial Estate with Sainsbury, Morrisons and Waitrose having held pre-application discussions with Council Officers.

1.3 There has also been discussion regarding the potential redevelopment of Sainsbury existing foodstore on Station Road and this is also an impact scenario considered.

1.4 Following this introduction we review relevant national planning policy in PPS4: Planning for Sustainable Economic Growth and the Supporting Practice Guidance on need impact and the sequential approach (Section 2). Briefly review Rother District Councils Retail Planning Evidence Base in Section 3. The foodstore development scenarios being tested are then reviewed and comment is provided upon their locations relative to Bexhill town centre (Section 4). Consideration is then given to retail impact upon Bexhill town centre arising from the proposals being tested in Section 5 and Section 6 considers the implications for the existing Sainsbury store in Bexhill. Finally our conclusions are provided at section 7.

2 RELEVANT NATIONAL PLANNING POLICY

Introduction

2.1 National Planning Policy is set out in a series of planning policy statements. The general approach is established in PPS 1 while other PPS's deal with specific aspects of planning. Until recently retail/town centre planning was covered in PPS 6 but at the very end of last year, after several years of consultation/speculation, the guidance in respect of various types of economic development were cancelled and consolidated into the new PPS 4 : 'Planning for Sustainable Economic Growth'.

PPS 1

2.2 Notwithstanding the new PPS 4 the general guidance contained in PPS 1 remains and is not in any way amended. PPS 1 sets out the Government's objectives for the planning system. Effectively it circumscribes a plan-led system as follows:-

> *"Where the development plan contains relevant policies, applications for planning permission should be determined in line with the plan, unless material considerations indicate otherwise" (para 8).*

2.3 Paragraph 9 goes on to state that 'planning authorities must ensure that plans are kept up to date and that planning applications are dealt with expeditiously, while addressing the relevant issues'.

2.4 In order that sustainable development is integrated into Development Plans, paragraph 26 sets out matters which should be attended to in plan preparation. These include, inter-alia:-

i) recognition of the needs and broader interests of the community
ii) drawing up plans for appropriate time scales
iii) taking account of both negative and positive effects on the environment as well as the positive effects of development in terms of economic benefits and social well-being
iv) ensuring that plans and policies are properly based on analysis and evidence.

PPS4

2.5 The new PPS 4 brings the various types of economic development (defined in paragraph 4 of PPS4) together and seeks to apply common principles to them with the overarching objective of achieving sustainable economic growth. The objectives include:-

- delivering more sustainable patterns of development and reducing the need to travel by car and responding to climate change;
- promoting the vitality and viability of town and other centres as important places for communities. This will be achieved by:
- focusing new economic growth in existing centres;
- promoting competition between retailers and enhancing consumer choice;

2.6 PPS 4 goes on to set out a number of policies. The first group, termed 'plan making policies' (Policies EC1 to EC8), are to be taken account in the preparation of plans at the various levels. The second group, termed 'development management policies' (policies EC10 to EC19), are to be applied by the decision maker in determining planning applications where relevant.

PPS4 – Plan Making Policies

2.7 Policy EC1: Using evidence to plan positively – Rother DC is considered to have planned positively in so far as retail development is concerned using an appropriate level of evidence base and taking account of both quantitative and qualitative need.

2.8 Policy EC3: Planning for centres – Councils are required to carefully consider the physical needs of each centre in the local hierarchy.

2.9 Policy EC4: Planning for consumer choice and promoting competition in town centres – Councils are required to promote competitive town centre environments and provide for consumer choice by inter alia:

b. planning for a strong retail mix so that the range and quality of the comparison b. and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre.

d. identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified ……

f taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres

2.10 Policy EC5: Site Selection and Land Assembly for main town centre uses – Councils should identify an appropriate range of sites to accommodate the identified need. Furthermore, an apparent lack of sites of appropriate size and locations should not be reasons for Councils to avoid planning to meet the identified need for development. EC5.2 requires that sites for main town centre uses should be identified through the sequential approach (suitable, available, viable), starting with in centre, then edge of centre and finally out of centre with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre.

2.11 Under EC5.4 Councils are required to assess the impact of proposed locations taking account of impact considerations in EC16 to ensure that any proposed edge or out of centre sites would not have an unacceptable impact on centres within the catchment.

PPS4 – Development Management Policies

2.12 The guidance now contained in PPS4 has a series of development management policies which advise the new tests that have to be satisfied when dealing with applications for Economic Development which includes town centre uses such as retail.

2.13 In particular Policy EC10 requires that Local Planning Authorities adopt a positive and constructive approach to planning applications proposing economic development. The guidance states:

> *"planning applications that secure sustainable economic growth should be treated favourably."*

2.14 When considering the general and wider impact of proposals for economic development, Policy EC10 suggests that the following should be considered:

- whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, minimise vulnerability and provide resilience to climate change;

- the accessibility of the proposal by a choice of means of transport and the affect on congestion after public transport and traffic management measures have been secured;

- achieving high quality inclusive design to improve the character, quality and function of the area;
- the impact on economic and physical regeneration of the area;
- local employment impacts.

2.15 Where dealing with planning applications for main town centre uses (including retail), Policy EC14 sets out the supporting evidence that should be provided and that sequential approach and retail impact are the tests to be satisfied for proposals not in an existing centre and not in accordance with an up to date development plan.

2.16 Policy EC15 of PPS4 deals with the application of the sequential approach requiring inter alia that:

- sites are assessed for their availability, suitability and viability;
- all in centre options are thoroughly reviewed before less central sites are considered;
- where no town centre sites exist, preference is for well connected edge of centre sites;
- a flexible approach is demonstrated in terms of scale, format, car parking and disaggregation subject to any genuine difficulties over retail business model.

2.17 The assessment of impact on centres is detailed in Policy EC16. This requires that proposals should be assessed in terms of:

- impact on planned public and private sector investment;
- impact on town centre vitality and viability, local consumer choice and range and quality of retail offer;
- impact on allocated sites outside town centres being developed in line with development plan;
- trade/turnover impact;

- scale of proposal in context of the centre and its role in hierarchy;
- locally important impacts (to be defined by LPA).

2.18 In drawing together the sequential assessment and impact test, Policy EC17 advises that planning applications for retailing not in an existing centre and not in accordance with an up to date development plan, should be refused planning permission where:

- Compliance with sequential approach has not been demonstrated; or
- There is clear evidence that the proposal will lead to significant adverse impacts under consideration of EC10 and EC16.

2.19 Guidance to assist the interpretation and application of the national policy tests in PPS4 is provided by DCLG in their publication 'Practice Guidance on need, Impact and the Sequential Approach' which was issued as a companion guide to PPS4. The practice guidance is not a Statement of Government Policy, rather it is guidance to help those involved in preparing or reviewing need, impact assessments and sequential site assessments.

2.20 In so far as the practice guidance is relevant to this impact advice note, it is reviewed in subsequent sections in the context of sequential approach and impact tests and to confirm the compliance of our approach with the guidance.

3 RETAIL PLANNING EVIDENCE BASE

3.1 In 2008, GL Hearn prepared a District-wide Shopping Study on behalf of Rother District Council. This study was prepared to provide a robust evidence base for the retail and town centre elements of the LDF.

3.2 Whilst the shopping study predates the publication of PPS4 and the companion good practice guidance, the methodology adopted and the study outputs are considered to comply with new national guidance. In particular, a market share approach based upon a household survey and assessment of both market share and benchmark turnover was used to establish under and overtrading. Consideration was also given to qualitative need factors.

3.3 It is beyond the scope of this impact testing work to revisit the quantitative need calculations, however it is noteworthy that consumer retail spending and the forecast growth in spending has been reviewed downward over the last two years in response to recessionary economic effects and their impact upon consumer spending particularly discretionary spending on comparison goods.

3.4 We do not subscribe to the use of overly detailed year on year consumer spending forecasts, especially for longer time horizon retail planning forecasts and prefer instead the application of trend based forecasts which even out recessionary cycles to show underlying longer term consumer spending growth. However, the recession has been particularly strong and as a consequence there has been a downward shift in consumer spending trend line which has reduced the spending growth forecasts we now apply to our retail assessment work.

3.5 For example, the rate used for convenience goods growth in the 2008 work was +0.8% per annum, now in 2010 we would adopt a growth rate of +0.7% per annum.

3.6 Therefore, if we were assessing the quantitative need for additional retail floorspace in Bexhill now, the floorspace requirement would be marginally smaller. There would however be a quantitative need and this would be supported in terms of qualitative need, given that the level of provision has not changed since 2008.

4 THE POTENTIAL FOOD STORE SITES

Introduction

4.1 In this section we consider the potential sites that have come to light through discussions between the Council and foodstore operators/developers. In particular, we assess the sites location relative to Bexhill town centre, accessibility by non car modes, the existing connectivity to the town centre and the likelihood of forming links with the centre.

4.2 The sites are:

A. Existing Sainsbury Store and adjoining sites, Station Road

B. Beeching Road South

C. Beeching Road North

4.3 The location of these sites is shown on the plan provided at **Appendix B**.

Existing Sainsbury Site and Adjoining Sites

4.4 The existing Sainsbury store and adjoining land is shown as site ‘A’ on the Plan at **Appendix B**. This comprises the existing Sainsbury store and retail/service units on Station Road and Buckhurst Place. The site has an area of 1.295 ha.

4.5 The site has been assessed by Sainsbury’s advisers and an illustrative layout we have seen demonstrates that the site could accommodate a replacement store of 4,126 sq m sales/5,967 sq m gross. This requires some undercroft car parking and could only be developed through demolition and rebuild.

4.6 The financial viability of this redevelopment option is claimed by Sainsbury and their advisers to be uneconomic. This has been subject to independent viability modelling by Messrs Gooch Cunliffe Whale (GCW) and they have confirmed that the development as proposed is not financially viable but they do not agree the financial shortfall is as large (negative) as Sainsbury have suggested.

4.7 GCW have suggested an alternative form of development on this site which could be financially viable.

4.8 In terms of sequential approach, this site is considered to fall within the town centre, albeit that it is on the northern (wrong) side of the railway line and does not integrate particularly well with the main portions of the town centre south of the railway line.

Logical pedestrian routes from the store to the town centre are either to the east via the existing footbridge over the railway line on Station Road to Devonshire Square or to the west along Buckhurst Place, under the railway bridge to Sackville Road and onto Western Road. Any redevelopment proposals should aim to achieve improved integration with and connectivity to the rest of the town centre.

Beeching Road South

4.9 The Beeching Road South area is shown as site 'B' on the Plan at **Appendix B**. The site is in a mix of uses and ownerships. The main uses are The Beechings Park Industrial Estate (20 No. 'B' use units), long stay pay and display car parking (Wainwright Road car park – Rother District Council), lorry parking, bus depot, Grahams Builders Merchant, TFI Timber manufacturers and Veterinary Surgery (Claremont Vet Group).

4.10 The site is shown to comprise three parcels of land: south, central and north. Individually they comprise 1.03 ha, 1.35 ha and 0.53 ha respectively and combined they are 2.91 ha.

4.11 The site has frontage to Terminus Road and Beeching Road to the south and west respectively. To the east there is an area of housing (mainly Victorian terraced) along Victoria Road, Reginald Road and Windsor Road.

4.12 Beeching Road South measured from its southern frontage to Terminus Road is approximately 320m distance from Bexhill's main shopping area (Western Road) and pedestrian access is via Terminus Road to Buckhurst Place then Sackville Road (under the railway bridge) onto Western Road. In terms of walk times the route to the town centre from the Terminus Road frontage of the site takes approximately 4 minutes and it is generally flat and easily walkable, although this route lacks animation and shopper interest and does present some pedestrian/vehicular conflict when crossing Terminus Road/Buckhurst Place. Pedestrian crossing and pavement widening works would be required to enhance the walkability of this route.

4.13 In sequential terms we would describe this site as edge of centre when the southern parcel of land (fronting Terminus Road) is included, provided improvements are made to the existing pedestrian route to the town centre. If the site is developed to exclude the southern parcel of land it lacks a direct and easily walkable route to the town centre and is in our view an out of centre site.

4.14 It is understood that developer/retailer interest in Beeching Road (South) has been received from the following:

Waitrose	2,322 m^2 (25,000 ft^2 net)
Morrisons	4,645 m^2 (50,000 ft^2 gross) assumed 2,937 sqm (31,614 $ft^{2)}$ net)
Sainsbury	7,896 m^2 (85,000 ft^2 gross) 5,574m^2 (60,000 $ft^{2)}$ net)

4.15 It is understood that interest received is for differing permeations of these parcels of land. This site's potential for forming a link into the town centre is dependent upon pedestrian route upgrading and perhaps more importantly store configuration and orientation to have the store on the southern portion of the site (Beeching Park Industrial Estate) orientated to Terminus Road to have as short a walk distance as possible and thus maximise potential linkage to the town. A store located central within the site or in the northern portion would not have the same level of linkage potential and would in our view be out of centre.

Beeching Road North

4.16 The Beeching Road North site is referenced C on the Plan at **Appendix B**.

4.17 The site is in a mix of uses comprising the Build Centre (Builders Merchants), Jeweson (Builders/Merchants), Fire Station and Ambulance Station/offices.

4.18 The site has frontage to Beeching Road, London Road and Little Common Road. Strategically, this site is well located, opposite the southern (Bexhill) end of the planned/safeguarded route of the Hastings/Bexhill Link Road.

4.19 The Beeching Road North site is approximately 840m distance from Bexhill's main shopping area (closest to Western Road) and the pedestrian route into the town centre would be via London Road (which has a north to south fall in gradient) to Buckhurst Place then onto Sackville Road (under the railway bridge) to Western Road.

4.20 London Road has a mixed commercial retail and residential feel and is also a main vehicular access route (A269) in to Bexhill. It does not present a particularly attractive walking route into the town centre and the likelihood of any pedestrian linked trips between this site and the town centre is very limited, particularly given the gradient of the route. The walk time into the town centre from the site is approximately 10 minutes.

4.21 In sequential terms we would describe this site as out of centre, being beyond a reasonable walking distance from the town centre and having very little potential to form links with the centre.

4.22 The Beeching Road North site is shown as comprising two parcels of land, the larger northern site is 1.46 ha, the smaller southern parcel comprising the Ambulance Service premises is 0.57 ha, combined they have a total area of 2.03 ha.

4.23 It is understood that Sainsbury are interested in developing this site for a 7,896 m^2 (85,000 ft^2)gross/5,574 m^2 (60,000 ft^2) sales area store. Such a store on this site would be a freestanding superstore attracting car borne main food shopping trips and also providing some ancillary comparison goods shopping ranges.

Conclusions

4.24 In sequential order, the sites being considered are:

- In Centre – Station Road/Buckhurst Place
- Edge of Centre – Beeching Road South (<u>including</u> the southern parcel/frontage to Terminus Road)
- Out of Centre – Beeching Road North
  - Beeching Road South (<u>excluding</u> Southern parcel/frontage to Terminus Road)

4.25 The in centre site would however benefit from better integration with the rest of the town centre (on the southern side of the railway line).

4.26 With regard to the Beeching Road South site for this to be viewed as an edge of centre site it must include the Terminus Road frontage and any store should be located on the southern portion of the site to maximise potential linkages. Additionally, measures could be secured to improve the environment, physical linkage and walkability between this site and the town centre. If the southern portion of the site is excluded, the potential to form linkages is diminished and this permutation should be viewed as an out of centre option.

4.27 The site being considered at Beeching Road North is out of centre and by function of its distance from the town centre and route gradient, there is nothing which could be done to improve the sequential status of this site.

5 RETAIL IMPACT

Introduction

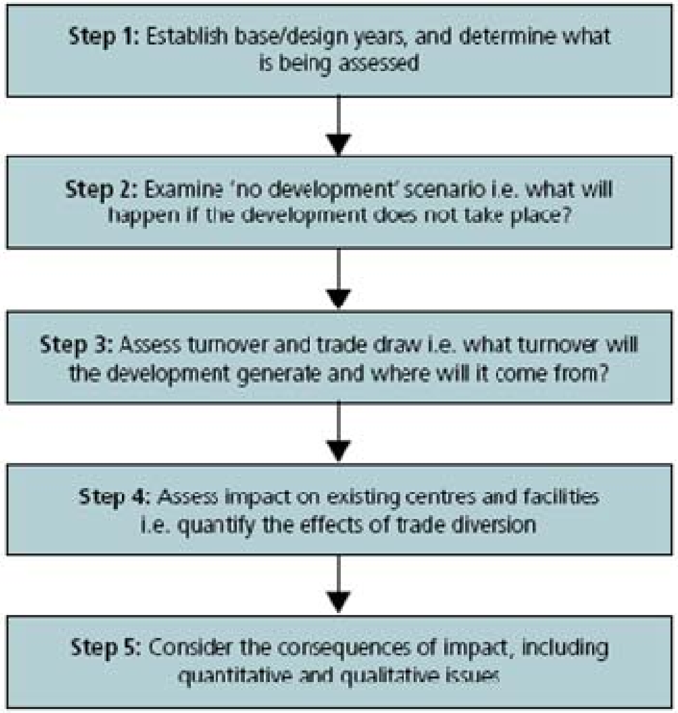
5.1 PPS4 advises that Councils in plan making should assess the impact of sites on existing centres (Policy EC5.4) and in doing so should have regard to the considerations in Policy EC16.

5.2 Those EC16 considerations are:

- Planning applications for main town centres uses that are not in a centre (unless EC16.1.e applies) and not in accordance with an up to date development plan should be assessed against the following impacts on centres:
  - a. the impact of the proposal on existing, committed and planned public and a. private investment in a centre or centres in the catchment area of the proposal;
  - b. the impact of the proposal on town centre vitality and viability, including local b. consumer choice and the range and quality of the comparison and convenience retail offer;
  - c. the impact of the proposal on allocated sites outside town centres being c. developed in accordance with the development plan;
  - d. in the context of a retail or leisure proposal, the impact of the proposal on d. in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made, and, where applicable, on the rural economy;
  - e. if located in or on the edge of a town centre, whether the proposal is of an e. appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres;
  - f. any locally important impacts on centres under policy EC3.1.e

5.3 To support the interpretation of these policies, the PPS4 Practice Guidance provides further details on measuring town centre impacts in Part 7: Assessing Impacts and at Appendix D: Quantifying Impacts.

5.4 The figure below summarises the steps required to quantify retail impact.



Methodology

5.5 The impact assessment tables are provided in **Appendix C** and the methodology for the assessment is briefly summarised below.

5.6 The baseline adopted for the trade diversion and turnover impact assessment is the market share information (collected from the 2008 household survey) used in the Rother District-wide Shopping Assessment 2008.

5.7 It has been necessary to make minor adjustments to the market share to reflect the consent granted for an Asda store at St Leonards, which it is assumed would be trading by the time the potential scenarios in Bexhill will have opened and have established trading patterns. To reflect the likely timescale of the proposals coming forward and to allow a period for trading patterns to settle down, a design year for impact testing of 2015 has been adopted. This also conforms to the PPS4 guidance which suggests assessing impact five years forward.

5.8 In preparing the impact assessment tables, we have also used the latest available consumer spending forecasts and updated population data (**Tables A to E, Appendix C**).

5.9 Having established the baseline trading position in 2015, each of the potential foodstore developments is then introduced into the established trading pattern, with judgements made on the trade draw of the individual proposals and the resultant effect on market shares of the existing stores and centres.

5.10 The trade draw and revised market shares are necessarily based upon judgements and comparative evidence of the trading attraction of similar sized/functioning stores. The PPS4 Practice Guidance advises that two factors need to be taken into account:

- First, it will always be relevant to consider the character of the development proposed, to judge its likely trading impact. There is a general assumption that 'like affects like', so, for example, in an area already served by large modern foodstores, the effects of a new large food superstore are likely to fall disproportionately on the existing competing stores. Their proportionate impact on local independent retailers, or discount foodstores for example may be less.

- Second, it is relevant to consider distance, based on the assumption that generally consumers will seek to use the closest comparable facility. So, for example, if in a given zone a relatively small proportion of trade is attracted to a facility which is similar to, but considerably further away than the proposal in question, it is likely to have a disproportionate effect on that facility.

5.11 The PPS4 Guidance highlights that the key factor likely to influence the significance of identified levels of impact is the current health of existing centres, and the extent to which any strategy or planned investment in a centre could be prejudiced by predicted impacts.

5.12 A review of the vitality and viability of Bexhill town centre is provided at **Appendix D**. This is an update to the town centre health check provided as part of the 2008 District-wide Shopping Assessment.

5.13 In summary, Bexhill's existing vitality and viability is judged to be reasonable, and is relatively unchanged from the previous 2008 health check. There have been increases in the number of convenience and retail service uses in centre with a decrease in comparison retailers. There has also been an increase in vacancies in the town centre. Registered retailer requirements for Bexhill recorded on the Focus database have fallen since 2008. Notably however the former Woolworths store re-let within a short period of time to Iceland.

5.14 In assessing the impact effects of the various food store development scenarios, the Council have posed a series of questions relating to the vitality and viability of Bexhill, which they wish to have addressed for each of the potential foodstore proposals (see Study Brief at **Appendix A**). These questions are dealt with toward the end of this section, after we have reviewed the trading and turnover effect of each of the proposals upon Bexhill town centre to provide the impact context against which to respond to the specific questions.

Sainsbury On Site Redevelopment, Buckhurst Place

5.15 The Sainsbury on site replacement store has been assessed on the basis of a benchmark turnover of £33.5m comprising £28.5m convenience turnover and £5.0m comparison goods turnover (see **Table F, Appendix C**).

5.16 Given that the existing Sainsbury store, which is to be replaced, overtrades significantly, the actual uplift (difference) in turnover between the replacement store (at benchmark) and the existing store is £8.4m (£33.5m minus £25.1m).

5.17 The trade draw of the replacement Sainsbury store is assumed to broadly reflect the penetration of the existing store which draws the majority of its trade from Bexhill East and Bexhill West study zones, with a small market share from the Battle Study Zone. It is assumed also that given the wider range of goods offered (including comparison goods) that the replacement store could draw 5% of its trade/turnover from outside the defined study area.

5.18 In terms of trade diversion, we consider the replacement Sainsbury will derive a proportion of its convenience goods trade from stores in Bexhill and from the larger main grocery stores including Tesco Ravenside; the larger foodstores around Hastings and Asda Crumbles (Eastbourne) by virtue of their comparable goods ranges and their existing market shares particularly from the two Bexhill Study Zones.

5.19 Comparison goods trade diversion is estimated on a similar basis, with Bexhill, Hastings and Eastbourne, subject to some trade diversion and those foodstore with non-food ranges subject to diversion also.

5.20 The impact on individual convenience stores in Bexhill arising from the Sainsbury replacement store is set out in **Table Q, Appendix C**.

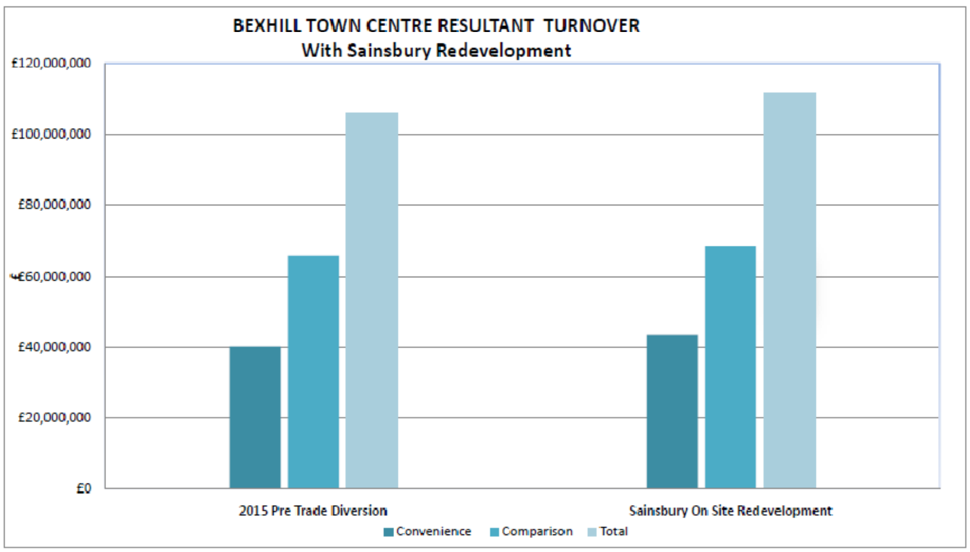
5.21 We forecast that the convenience impact of the redeveloped store on the pre impact market share turnovers of existing stores in Bexhill will be relatively modest. The impact prediction is:

Somerfield	2%	(-£0.1m)
Co-Op	<1%	
Local Stores	5%	(-£0.2m)

5.22 With this level of trade diversion impacts these stores will still trade at a level beyond our theoretical benchmark. Overall, the convenience turnover of town centre is higher as a result of the Sainsbury redevelopment by virtue of the additional Sainsbury turnover drawing/retained in Bexhill town centre.

5.23 For comparison goods (see **Table R, Appendix C**) the trade diversions forecasts predict a turnover diversion from Bexhill town centres comparison shops to the replacement store of £1.2m equivalent to an impact of 1.9%. Overall however the comparison goods turnover of the town centre within the replacement store will increase.

5.24 The graph below illustrates the turnover effect on Bexhill town centre for the convenience, comparison and total retail turnover relative to 2015 (no store) baseline.



5.25 This shows an overall positive effect on Bexhill town centre's turnover arising from the on site replacement of Sainsbury. This is attributable to the overall increase in Bexhill town centres turnover of circa £3m on convenience goods and £2.6m on comparison goods.

Sainsbury, Beeching Road (north and south)

5.26 The potential of a new Sainsbury store at Beeching Road, both north and south, has been assessed on the basis of a sales are of 5,520 m^2 comprising 65% food and 35% non food sales. The turnover tested is £37.8m convenience goods turnover and £10.06 m comparison goods turnover (see **Table F, Appendix C**).

5.27 In testing this scenario, we have assumed that the existing Sainsbury store at Buckhurst Place is closed and its turnover (market share) is redistributed, with most but not all of this ‘released’ turnover assigned to the new larger Sainsbury store.

5.28 The turnover/trade diversion modelling is the same for both the Beeching Road (north and south) options for new Sainsbury stores. Whilst there will be some differences between the trading patterns of a Sainsbury store on one site compared to the other, these are anticipated to be relatively subtle and the judgements we have made on trade draw for a store of this size in this broad location are considered to be robust and equally appropriate for both Beeching Road north and south.

5.29 The trade draw to these new Sainsbury stores are anticipated to broadly reflect the trading pattern of the existing Sainsbury Bexhill, although its attraction will be stronger by virtue of its size and goods ranges and have assumed it will draw 10% of its turnover from beyond our study area and take small proportions of trade from the north west Rother, Battle, Rye and West/Guest/Fair Study zones. **Table I, Appendix C** set out the assumed trade draw and turnover diversions for the Sainsbury Beeching Road scenarios.

5.30 The summary table of convenience trade diversion (**Table Q, Appendix C**) sets out the monetary trade diversions and impact upon convenience turnover of existing stores based upon the 2015 baseline market share trading. This shows the following individual impacts for stores in Bexhill:

Somerfield	9%	(-£0.37m)
Co-Op	3%	(-£0.08m)
Local store	11%	(-£0.41m)

5.31 Overall, with the loss of Sainsbury from the town centre, there is an appreciable fall in Bexhill town centre’s convenience goods turnover (-65%/-£26m). A consequence of this, assuming the Sainsbury’s store in the town centre is not reoccupied by a food retailer, is that over 85% of the total convenience turnover of Bexhill would be secured by out of centre stores i.e. potential new Sainsbury and Tesco Ravenside. The corollary of this is the town centre capturing only 15% of the convenience goods spending.

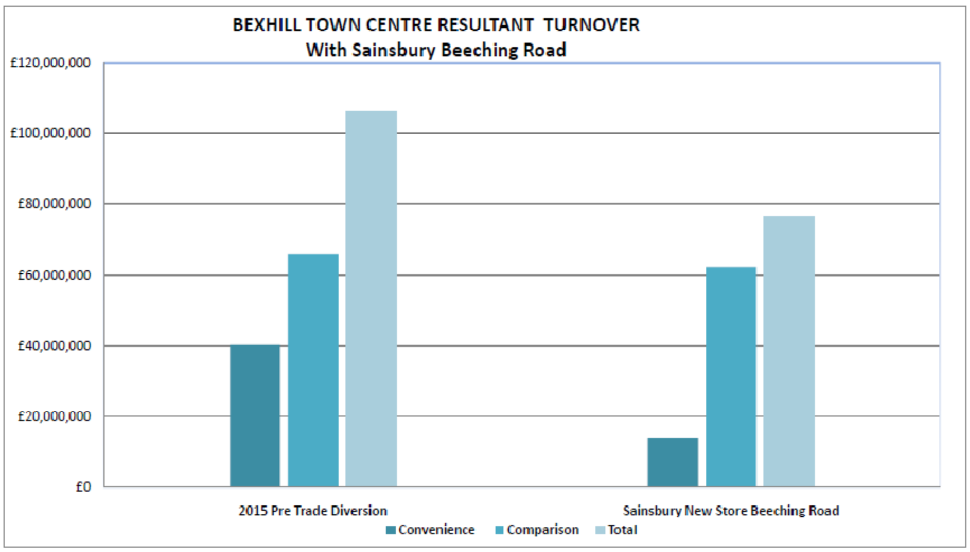
5.32 Bexhill’s two district centres are subject to some convenience goods trade diversion, overall Sidley is anticipated to experience a 4% impact and Little Common a 2% impact.

5.33 Other stores and locations subject to trade diversions include Tesco Ravenside; Asda Eastbourne; Sainsbury St Leonards; and Asda St Leonards (committed).

5.34 Comparison goods trade diversion to the potential Sainsbury Beeching Road stores is set out in **Table N, Appendix C**. Trade is drawn from Bexhill, Hastings and Eastbourne and the larger foodstores with comparable non food ranges.

5.35 The comparison goods trading impact (see **Table R, Appendix C**) on Bexhill town centre is predicted to be around 5%, withdrawing around £3.5m turnover from existing stores in the town centre.

5.36 The graph below illustrates the turnover effect of a new Sainsbury at Beeching Road on trading levels in Bexhill town centre for the convenience, comparison and total turnover relative to 2015 baseline.



5.37 This shows a very marked effect upon the convenience and total turnover of the town centre (reflecting the loss of Sainsbury and its turnover from the town). This drop in turnover would be significant and we anticipate it would be manifest in other physical impacts upon the town centre.

Waitrose Beeching Road (south)

5.38 The trading impact of a potential Waitrose store at Beeching Road South has been assessed on the basis of 2,323 m^2 sales area of which 85% would be food sales. The turnover tested is £23.3m convenience goods and £2.3m comparison goods turnover (see **Table F, Appendix C**).

5.39 It is anticipated that the new Waitrose store would derive the main proportions of its turnover from Bexhill East and West Zones and would attract some limited visits from residents in the North West Rother and Battle Study Zones. The store is also expected to attract 10% of its turnover from beyond the defined Study Area. The detailed trade draw assessment is provided at **Table J, Appendix C**.

5.40 **Table Q, Appendix C** shows the summary trade diversion and impact upon existing stores and centres following the introduction of Waitrose.

5.41 The stores in Bexhill town centre are impacted thus:

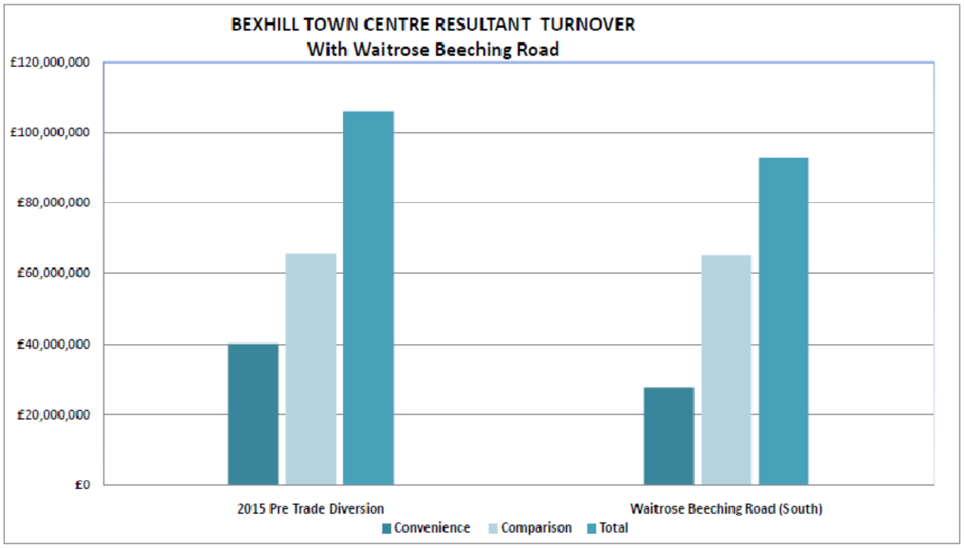
Sainsbury	40%	(-£1m)
Somerfield	24%	(-£1m)
Co-Op	11%	(-£0.3m)
Local Stores	23%	(-£0.9m)

5.42 The largest individual impact is upon Sainsbury, Bexhill, which is anticipated to be impacted by 40% based on 2015 baseline market shares. Although even with this level of trade diversion (£10m) the Sainsbury store will continue to trade above company benchmark levels. Other convenience impacts are 23% on local stores in Bexhill whose collective turnover would fall below anticipated benchmark, 24% on Somerfield although this store will trade above benchmark and 11% of Co-Op which will continue to overtrade compared to benchmark.

5.43 Overall, the convenience goods trading impact of Waitrose on Bexhill town centre results in a 31% impact on the baseline position.

5.44 Comparison goods trading impact is relatively modest given that the Waitrose is assumed to provide only a limited range of comparison goods (see **Table O, Appendix C**). The percentage impact anticipated to fall of Bexhill town centre is below 1%. A 1% impact is forecast upon Battle town centre's comparison goods turnover with Sidley and Little Common local centres also experiencing some low level comparison goods impacts.

5.45 The graph below illustrates the effect on turnover within Bexhill arising from a Waitrose store at Beeching Road (south).



5.46 The largest turnover diversion from Bexhill town centre is on convenience goods, comparison turnover is relatively unaffected and the fall in total turnovers is attributed to the convenience diversion (predominantly from Sainsbury).

Morrisons Beeching Road (south)

5.47 The potential trading impact of a new Morrisons at Beeching Road has been assessed on the basis of a store with a sales area of 2,973 m^2 retailing some 80% food (convenience goods) and 20% comparison goods. The predicted benchmark turnover of the Morrisons tested for impact purposes is £26.3m convenience goods and £3.6m comparison goods (see **Table F, Appendix C**).

5.48 The pattern of trade draw (and trade diversion) broadly follows that predicted for Waitrose, albeit the monetary diversions are larger. Again 10% of the store's turnover is anticipated to be drawn from beyond the study area. The trade draw assessment for Morrisons at Beeching Road is set out in **Table K, Appendix C**.

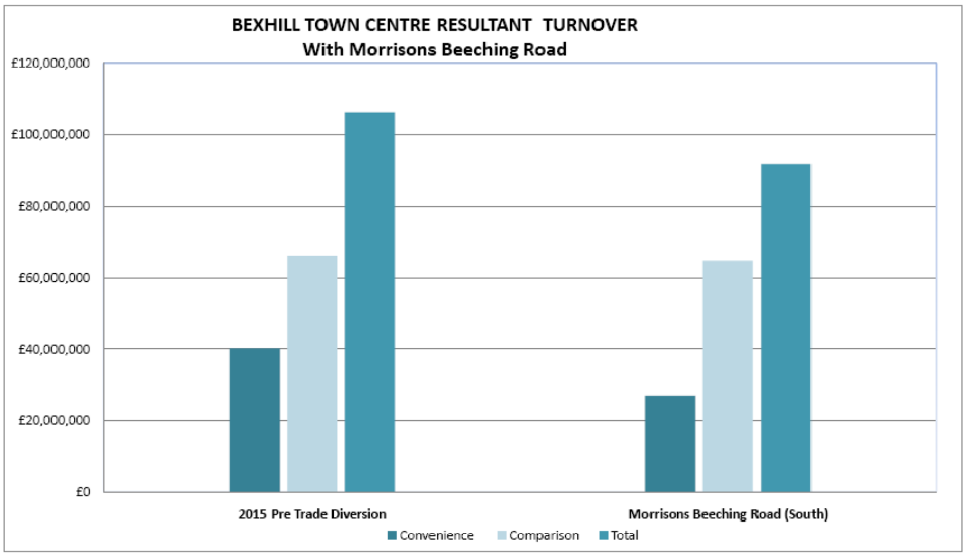
5.49 **Table Q, Appendix C** shows the summary trade diversion and impact upon existing stores and centres following the introduction of Morrisons. The predicted impacts on the baseline market share turnovers of facilities in Bexhill town centre are:

Sainsbury	42%	(-£10.4m)
Somerfield	26%	(-£1.1m)
Co-Op	11%	(-£0.3m)
Local Stores	25%	(-£1.0m)

5.50 The overall predicted trade withdrawal from the town centre would be £12.8m. Adjudged against benchmark turnovers, the local stores in Bexhill fall below benchmark turnover by some 10%, whilst the others continue to trade beyond benchmark levels.

5.51 The comparison trading impact on Bexhill town centre is predicted to be 1.6% or turnover withdrawal of £1.1m from existing shops. Forecast impact on other centres are: Battle 1%; Sidley 3%; Little Common 2% (see **Table R, Appendix C**).

5.52 The graph below illustrates the effect on turnover within Bexhill town centre arising from the development of a Morrisons store at Beeching Road (south).



5.53 The largest diversion is on convenience goods turnover (predominantly Sainsbury), comparison goods turnover is reduced to a lesser degree and the overall fall in turnover correlates with the convenience trading impact.

5.54 Having assessed the turnover impact of the various foodstore development scenarios, we turn now to consider the potential physical and qualitative changes which could result.

What is the likely effect on the overall vitality and viability of Bexhill town centre (as currently defined)?

5.55 The **Sainsbury on site redevelopment** would, subject to ensuring maximum potential linkages to the town centre south of the railway line are secured provide a boost to the vitality and viability of the town centre. The improved/increased attraction of the larger store with its wider range of goods would enable it to compete more effectively with the larger out of centre stores and thus potentially claw back trade and custom to Bexhill. The increased customer numbers at the enlarged Sainsbury should provide the town centre with potential linked trip benefits providing more visitors and shoppers thus contributing to an improvement in the vitality and viability of the town centre.

5.56 Whilst there will be some 'internal impacts' upon the turnover of Bexhill's existing traders through the cannibalisation of trade, the levels predicted do not in our view suggest store closures (particularly in light of existing trading levels) and the trade diversion predicted could be compensated by linked trip spending resulting from more shoppers in Bexhill town centre.

5.57 **Beeching Road (south)** – all three of the potential retailers looking at the Beeching Road South site would withdraw trade from the town centre, the most marked impact would be from Sainsbury (on the assumption their town centre store closes). The withdrawal of turnover (and visits) from the town centre would have a detrimental effect on the overall vitality and viability. If it was Sainsbury and they were to close their town centre store, the town centre will effectively lose its main retail attractor. In the circumstances, where it may be Waitrose or Morrisons developing a store at Beeching Road (south), we anticipate Sainsbury would continue to trade from their town centre store, albeit its turnover would be reduced to a level reflecting company average. Thus a viable main foodstore would remain in the town centre and provide an anchor. Accordingly, either Waitrose or Morrisons would have a less harmful effect on vitality and viability of the town centre, particularly as they are also promoting smaller stores and would stock less comparison goods than Sainsbury intend. There is some scope for linked trips to the town centre from this site, particularly if an attractive and safe pedestrian route is provided.

5.58 A foodstore at **Beeching Road (north)** would, in our view, have a detrimental effect upon the vitality and viability of Bexhill town centre. The site is too far removed from the town centre to provide any meaningful level of linked shopping trips and would instead be a standalone destination, taking turnover and shoppers from the town centre. We have assumed that Sainsbury will close their town centre store under this scenario.

What is the effect on further retail investment in the town centre?

5.59 **Sainsbury on site redevelopment** – given the investment required by Sainsbury to bring forward this on site replacement and the potential increase in shopper numbers in the town centre, this proposal should provide a positive signal to other retailers and investors, both within and interested in locating Bexhill town centre. In particular the development has the potential to improve the retail profile of Bexhill, flagging the town to other retailers who could look to come into the town on the back of Sainsbury improved presence and shopper attraction, thus creating a virtuous cycle.

5.60 **Beeching Road (south)** comprising either Morrisons or Waitrose would at best have a neutral effect but is more likely to have a negative effect on future town centre investment coming forward. Achieving a strong viable linkage to the town centre may provide some form of integration and encourage linked trips, if this is secured then there may be encouragement for small scale investment in shop front improvements etc, particularly along the route to the town centre, however substantial town centre investment and improvement is unlikely to flow from these proposals.

5.61 With Sainsbury taking a store at Beeching Road (south) and assuming their town centre store closes, there are some prospects for investment to bring forward the redevelopment of the vacated Buckhurst Place/Station Road site although the market currently is not considered strong enough for redevelopment to be contemplated immediately. The redevelopment is an medium to longer term possibility. Without this redevelopment coming forward, the prospects for any significant private sector investment in the town centre is limited.

5.62 **Beeching Road (north)** assuming the existing Sainsbury is vacated, this would present the potential the Buckhurst Place/Station Road site to be redeveloped. However as identified above, the market now is not particularly strong and redevelopment would be a medium to long term prospect. Should this not come forward, given the levels of turnover impact predicted from this scenario and the very limited likelihood of linked trips, the prospects for town centre investment are poor should the Beeching Road North site be development for main food retailing.

What is the likely effect on footfall on the main town centre retail streets?

5.63 **Sainsbury on site redevelopment** – This should generally be positive subject to ensuring that the proposed store is designed to maximise the potential linkage to the main shopping areas south of the railway line.

5.64 At **Beeching Road (south)** the development of a foodstore could result in a fall in pedestrian levels on the main shopping streets. However measures to improve linkage with the town centre such as siting the store on the southern portion of the site, orientation of the store, environmental and pedestrian upgrading should encourage linked trips which would mean that some of the trips diverted to the store at Beeching Road (south) from the town centre could be 'fed' back into the town centre. Were a store on this site to be developed on the central or northern parts, the linked trips potential would be less and the site should be viewed as out of centre.

5.65 The out of centre **Beeching Road (north)** site is likely to reduce footfall overall in the town centre.

What is the likely effect on trends in rental values (£/m^2) in the main town centre shopping streets over time (and how would values compare to other Coastal town centres)?

5.66 Rental levels in Bexhill currently are low relative to other similar sized coastal towns and competing towns. This is due to a number of factors including the configuration and age and quality of space available, limited national multiples, individual landlords and owner occupiers rather than institutional investors.

5.67 Rental levels on unit shops are generally set on a comparable rental level basis, with rents reviewed periodically throughout the lease period (generally upwards only). New lettings generally set the tone of rental levels and where there are no significant new lettings or lease renewals, coupled with vacancy rates showing no shortage of supply rents are generally static or may indeed fall. Essentially rents are a function of supply and demand.

5.68 Further information on rental levels in Bexhill and other towns is provided in **Appendix E**.

5.69 Whilst the **Sainsbury redevelopment** in the town centre will be a positive signal, it will only drive up rents where it brings about an increase in retailer demand for premises in Bexhill and with it, open market lettings which set a positive tone for lease renewals and rent reviews.

5.70 Potentially, as a worst case **Beeching Road (north and south)** could act to perpetuate the low and static rental levels in the town centre by reducing demand for premises in the town centre which in turn would be used as evidence of lack of demand to keep rents low at rent reviews or even seek to reduce rentals when lease renewals are negotiated.

To what extent is the impact on the town centre dependent upon the size of a store?

5.71 We have assessed a variety of sizes of proposal Waitrose the smallest and Sainsbury the largest and generally the smaller the size of store the lower the impact, although the retailer occupying the store will also have an influence in terms of their trading density/likely turnover. This is a function of competitiveness and overlap of the proposal with existing town centre provision and the ability also of stores to claw back trade from larger out of centre stores. Generally, a store of 2,500 m^2 and over is of sufficient size to stock a full convenience goods offer with some ancillary comparison shopping and can compete effectively.

5.72 The PPS4 Practice Guidance on need impact and the sequential test identifies that local circumstances are an important factor affecting the weight of impact:

> **The impact of foodstores on market towns/district centres – DETR**
>
> The research report, *The Impact of Large Food Stores on Market Towns and District Centres* was published in September 1998. The study aimed to examine the impact of large foodstore development on market towns and district centres through a series of detailed case studies.
>
> The research showed that large food stores can have an adverse impact on market towns and district centres, but the level of impact is dependent on the local circumstances of the centre concerned. In particular, smaller centres which are more dependent on convenience retailing to underpin their function are more vulnerable to the effects of larger food store development at edge-of-centre and out-of-centre locations.
>
> The report concluded that it is vital that those responsible for the future of market towns and district centres take positive steps to improve the range and quality of food shopping in these centres, and adopt a cautious approach to considering the location and likely long-term consequences of the development of large food stores in non-central locations.

5.73 Therefore the size of the proposed store will have a direct bearing upon the degree of overlap between the proposal and the function of the town centre.

To what extent is the impact on the town centre dependent upon the orientation of a store?

5.74 Store orientation is important to maximising the potential for pedestrian linkage to the town centre with the ideal being as direct and easy a walking route as possible and where practical a visual link through to the town centre. Although Beeching Road (south) could not achieve a visual connection, provided the store is located on the southern most portion of the site, walking distances from the store to the town centre are of a distance that shoppers could and would undertake. Furthermore, some form of dual use of the car park for short stay parking would encourage linked trips.

To what extent is the impact on the town centre dependent upon the attractiveness of the route between a store and the town centre?

5.75 The directness and attractiveness of the route is important, for example, whilst the existing Sainsbury provides a viable and reasonably well utilised route to the southern part of the town, more could be done to ‘connect’ a new store on this site to the rest of the town centre.

5.76 The **Beeching Road (south)** site could, if an attractive and animated route is achieved, provide some linked shopping trips. The dual use of the car park as a management regime to encourage short stay parking with sufficient time to shop in the store and make a trip to the town centre would also encourage linked trips. This would be a benefit to the town which could in part act to reduce the overall level of impact.

5.77 The out of centre **Beeching Road (north)** site is too far removed from the town centre to achieve linked trips therefore the attractiveness of route between the store and the town centre is of little relevant to this site and would not reduce impact upon the town centre.

6 IMPLICATIONS FOR SAINSBURY STORE, BUCKHURST PLACE/STATION ROAD

Introduction

6.1 In this section, we consider those elements of the Retail Impact Assessment Brief which relates to the future of the existing Sainsbury store if another food operator develops an out of centre store or Sainsbury relocate out of centre. In addressing these matters, we have had commercial input from Gooch Cunliffe Whale.

Impact on Sainsbury from Waitrose or Morrisons at Beeching Road South

6.2 Whilst impact on individual retailers can be considered legitimate competition, where a store is within and/or anchors a town centre, individual impact is a relevant consideration insofar as it will impact upon the town centre as a whole. Specifically, the Council have asked us to consider the implications of the future of the Sainsbury store if the out of centre store is that of another operator (i.e Waitrose or Morrisons).

6.3 The market share modelling (convenience goods) shows that the existing Sainsbury store trades beyond anticipated benchmark levels to some extent. The convenience trade diversion predicted for the Sainsbury together with its benchmark turnover are shown in the table below.

	Sainsbury, Buckhurst Place			
	Market Share Turnover 2015	**Post Trade Diversion Turnover**	**Benchmark Turnover**	**Post Trade Diversion vs Benchmark turnover**
Waitrose	£25.1m	£15.1m	£11.8m	128%
Morrisons	£25.1m	£14.6m	£11.8m	124%
Source: Extracted from Table Q, Appendix C				

6.4 Neither the Morrisons nor Waitrose proposals would impact upon the existing Sainsbury store to the extent that its turnover would fall below that retailers company average benchmark level. This should be broadly taken as an indication that Sainsbury could continue to trade viably from this store in competition with either of these proposals. Furthermore, it is understood that Sainsbury's lease for the premises runs up to 2024 and they would be unlikely to surrender their lease early given the potential financial penalty for early termination and the fact they could still achieve a positive return from continuing to trade from the store.

Alternative Uses

6.5 Gooch Cunliffe Whale have reported separately to Rother District Council upon the potential for reletting the Sainsbury store should it become vacant as a consequence of Sainsbury relocating to a larger store. They have also advised upon the potential for redevelopment of the site.

6.6 It is clear from the advice provided by Gooch Cunliffe Whale that there is very limited prospect of the existing premises as currently configured being re-let to a food retailer. The competition from the relocated large Sainsbury store and the existing Tesco Ravenside store means it is highly unlikely that a main stream food retailer such as Asda, Morrisons or Waitrose would take on the store. A possible food occupier could be Jempson's a regional multiple.

6.7 The best prospects for a retail letting therefore lie in the comparison goods sector although even this market, Gooch Cunliffe Whale advise is limited, particularly as this store's configuration is not ideal and its location is somewhat separated from the rest of the town centre. Gooch Cunliffe Whale anticipate there would be interest from certain destination non food retailers such as Matalan or potentially furniture and general goods type retailers. Occupiers of this type can act to pull shoppers into the town; but this would not 'compensate' the fall in centre vitality and viability arising from the loss of Sainsbury from the town.

6.8 In terms of redevelopment leisure, healthcare and residential uses are potential alternatives. Civic use is also a possibility. However in the current economic climate the appetite for development is low and we doubt whether any of these uses would be viable. Essentially a stronger market is required to be able to contemplate the redevelopment of this important town centre site.

Conclusion

6.9 Should an alternative retailer (i.e not Sainsbury) develop a foodstore on the edge of the town centre or out of centre, the analysis shows that Sainsbury could continue to viably trade from their existing store in its existing configuration, thus retaining some market share.

6.10 The prospects of letting the premises to main stream food retailers should Sainsbury vacate are not good given main food retailer competition in the local area. Potential comparison goods retailers would be drawn from the general or furniture goods categories and whilst those can be destination retailers, they would not provide sufficient customer draw to compensate for the loss of Sainsbury from the town centre in terms of attraction and town centre vitality and viability.

6.11 The alternative to retail for the redevelopment of the site is some form of mixed use development comprising civic, leisure, retail and health uses which could act as a destination and draw and retain visitors within the town centre. However in the current economic climate it is doubtful whether such a redevelopment would be viable.

7 CONCLUSION

7.1 Having considered the potential development scenarios, it is concluded that sequentially the sites should be considered in the following order:

In centre – Station Road, Existing Sainsbury and adjoining land with a requirement to provide improved linkages to the rest of the town as part of any redevelopment.

Edge of centre – Beeching Road (south) provided the store is located on the southern portion of the site (Terminus Road) and physical and environmental improvements are secured to improve linkages to the town centre. A store on the northern portion of Beeching Road (south) would be beyond edge of centre.

Out of Centre – Beeching Road (north) this site is well beyond the PPS4 distance threshold for edge of centre. The distance and change in gradient involved makes this store beyond a reasonable and easy walking distance from the town centre.

7.2 The consideration of trade diversion and turnover impact has highlighted the following effects on Bexhill town centre turnover. Although it must be borne in mind that the identified quantitative need and overtrading means that actual trade diversion do not result in particularly damaging impacts compared to anticipated benchmark turnovers.

7.3 The impact scenario testing has demonstrated that the most positive scenario for the town centre's vitality and viability is bringing forward the comprehensive redevelopment of the existing Sainsbury and adjoining land.

7.4 The other store scenarios tested result in potential negative effects on some or all of the vitality and viability indicators suggesting some decline in Bexhill's overall vitality and viability.

7.5 In particular, there is limited potential for private sector investment or substantial increases in rental levels in Bexhill town centre should a non town centre foodstore be developed. Furthermore, town centre footfall and visitation rates are anticipated to fall, particularly if Sainsbury were to relocate out of centre.

Appendix A

Council’s Brief

Draft Brief – revised 18th January 2010

Testing of Retail scenarios for Bexhill

Objective:
To advise the Council on the relative merits of alternatives for meeting shopping demand in Bexhill, having specific regard to proposals currently being put forward by retail operators.

Context:
Bexhill is recognised as having potential for additional convenience and comparison goods floorspace (Rother district-wide Shopping Assessment June 2008 refers).

The current Rother District Local Plan (adopted July 2006) identifies land in the defined town centre straddling the railway, incorporating the existing Sainsbury's store for additional convenience floorspace as part of a mixed retail, residential, office and parking development.

More recently and taking a longer time horizon, the LDF Core Strategy 'Strategy Directions' consultation document proposes an additional 2,500sq.m convenience goods and 4,000sq.m comparison goods floorspace, 'primarily through retail expansion adjacent to the railway'.

This policy direction leaves some cope for the precise area of retail growth, while early work has focussed on an area of mixed commercial, industrial and residential uses on Station Road adjacent to the Sainsburys site.

In discussions with Sainsburys about their interest in expansion, they have advised that this option is not economically viable. Rather, they are interested in a new large store on the nearby Beeching Road Industrial Estate.

At the same time, there is interest from other retailers for a similar location. Other sites around the town have also been enquired about.

The main enquiries, all relating to sites on Beeching Road, are listed below along side the site at Station Road:-

Operator	**Location**	**Store size**	
		gross	**net**
	Station Road		42,000sq.ft.
Sainsbury	Beeching Road (south)	85,000sq.ft	60,000sq.ft.
Waitrose	Beeching Road (south)		25,000 sq.ft.
Morrisons	Beeching Road (south)	50,000sq.ft	
Sainsbury	Beeching Road (north)	85,000sq.ft	60,000sq.ft*

Location plans and ownership plans will be provided (NB The southern location on Beeching Road includes two options, one including and one excluding units fronting Terminus Road.

Attention is drawn to the fact that the current Sainsbury store has a sales floor area of 1,490 sqm and a gross floor area of 1,900 sqm, This should be taken into account in relation to options for a Sainsbury relocation. It is also noted that Sainsbury's current site is owned by British Land on an upward only lease extending to 2024.

Tasks:

1. Retail development appraisal

Advice is sought on the robustness of evidence put forward by Sainsburys (to be provided on 17th February) in relation to the developability, or otherwise, of land on Station Road adjacent to the existing Sainsbury site. The council wishes to scrutinise the sainsbury position that the area is unviable for a replacement, enlarged store, given the site's advantages in terms of relationship to the town centre., The advice should also consider whether, and if so how, the council could be directly involved in order to make a scheme in this location viable..

2. Retail impact assessments

Advice is sought principally on the impact of each of the developments in the above table on the town centre, having regard to policy in PPS4, and to associated guidance. This advice should address each of the following questions:

(1) In what order should sites be considered in accordance with the sequential test?
(2) What is the likely effect on the overall vitality and vibrancy of Bexhill Town centre (as currently defined)?
(3) What is the likely effect on further retail investment within the town centre?
(4) What is the likely effect on footfall on the main town centre retail streets?
(5) What is the likely effect on trends in rental values (£/sqm) in the main town centre shopping streets over time (and how would values compare to other coastal town centres)?
(6) To what extent is the impact on the town centre dependent upon the size of a store?
(7) To what extent is the impact on the town centre dependent upon the orientation of a store?
(8) To what extent is the impact on the town centre dependent upon the attractiveness of the route between a store and the town centre?
(9) What are the likely implications for the future of the Sainsburys store if the out-of-centre store is that of another operator?
(10) What are the likely implications for the future of the Sainsburys store if it is Sainsburys that develop out-of-centre? (see notes below)

In relation to (9) and especially (10), advice is sought on:

(a) the likely range of potential alternative occupiers of the existing store if it were vacated by Sainsburys (including other town centre uses, such as leisure, entertainment, arts, offices) and relative implications for the vitality and viability of the town centre in these scenarios

(b) the commercial attractiveness of redeveloping the existing Sainsburys site, possibly with adjacent small unit shops in the light of the economics implies under (a) above. Redevelopment options to consider should consider, in broad terms, the option of some or all of the following: comparison goods stores, offices (possibly including library or education uses) residential above ground floor, and decked parking.(A general indication only is required at this stage, drawing on the consultancy's market knowledge. Further, more specific, work may be sought subsequently.)

In concluding on the above options, specific advice should also be given on their relative merits vis-à-vis retail development opportunities on sites more closely related to the town centre, with due regard to the scale and likely viability of such sites.

Outputs:

Task 1 requires a written critique and conclusions (in electronic form), having regard to the information supplied by Sainsbury and any additional information sought and provided. It is anticipated that an interim assessment will be necessary.

Task 2 requires two paper copies of the typed report that fulfils the requirements of the Brief are required, as well as one electronic version (in Word/PDF format). The report should be suitably illustrated and include clear OS-based maps which should also be provided electronically in a GIS format that is compatible with the Council's GIS system (GGP).

Programme:

The project should be carried out as soon as possible from 15th February. The consultants will make every reasonable effort to maintain the agreed timetable. Variation from the programme must be agreed in advance with the Project Manager.

The completed report, data collected and analysis undertaken as part of the study will be the property of Rother District Council.

Submission:

A submission is invited for the above work. This should be received by Friday 5th February by letter or email setting out:

- A proposed fee structure for Task 1
- A fixed fee for Task 2
- The name(s), qualifications and experience of the person(s) undertaking the work
- Proposed programme of work and time allocated

Allowance should be made for an inception meeting and a meeting to discuss the draft Report. The fixed fee will be inclusive of travel, subsistence and other overheads but exclusive of VAT.

No costs will be paid in connection with preparing the submission.

Working arrangements:

The work will be overseen by:

David Marlow, Principal Planning Officer, Rother District Council, Town Hall Bexhill-on-Sea, East Sussex, TN39 3JX

Telephone: (01424) 787639
Email: david.marlow@rother.gov.uk

Final payment will be made within 30 days of receipt of the final report.

The Consultant shall comply with all relevant statutory obligations, Health and Safety legislation and codes of conduct. Failure to do so will normally result in immediate termination of the contract.

The Consultant should acknowledge that the Council is the subject of the requirements of the Freedom of Information Act 2000 (FOIA) and the Environmental Information Regulations 2004 (EIR) and will be expected to pass any requests for information to the Council immediately they are received. Under no circumstances should the contractor respond directly to a request for Information unless expressly authorised to do so by the Council.

The Consultant shall maintain at his own cost a comprehensive or specific policy of insurance to cover professional indemnity and public liability.

In the unlikely event of intended termination of the contract, any notices of termination shall be in writing.

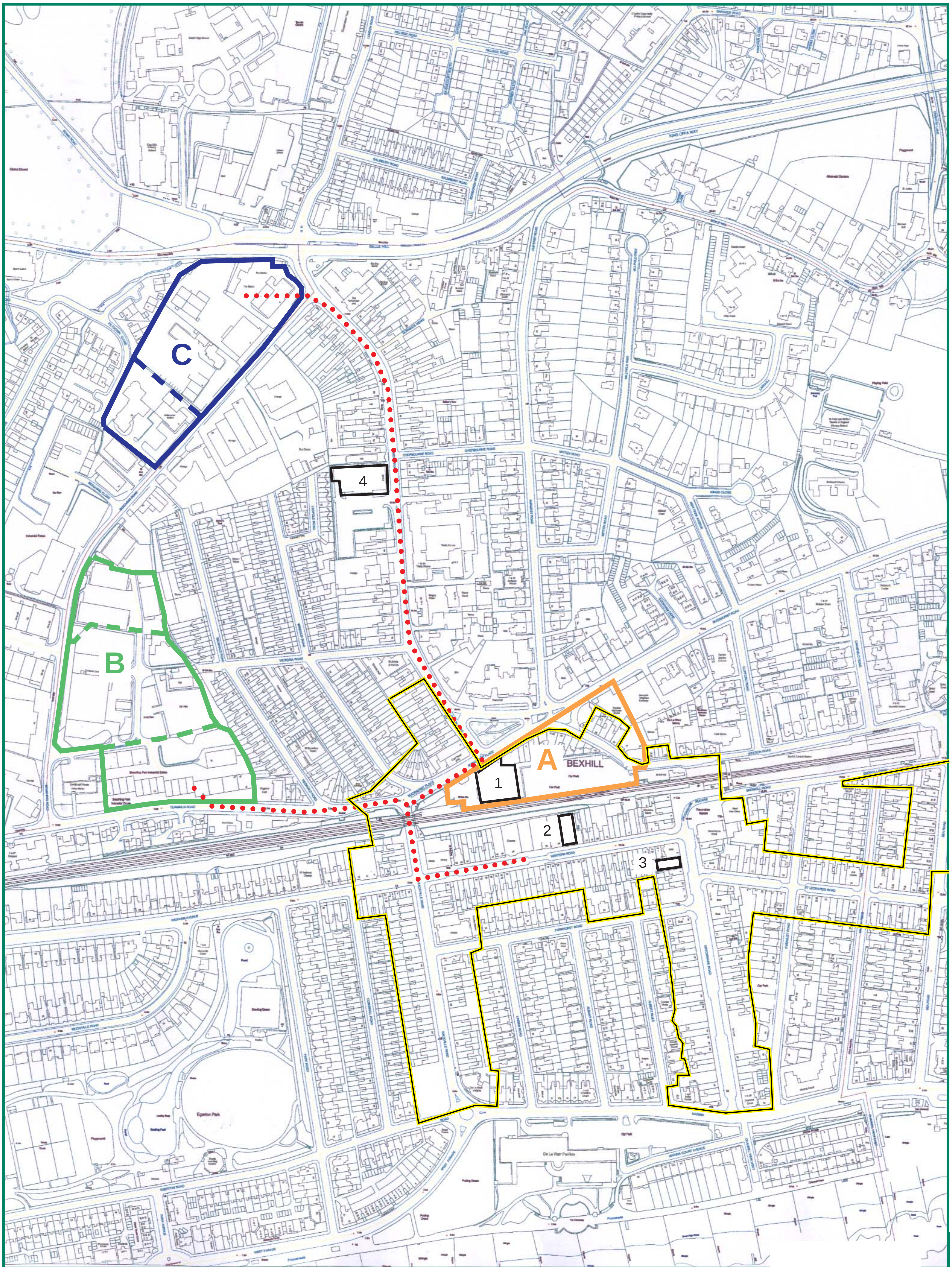
Termination by Employer: If the Consultant without reasonable cause makes default by failing to proceed diligently and in accordance with the agreed timetable with the work required, the Project Manager may give notice to the Consultant which specifies the default and requires it to be ended. If the default is not ended within 7 days of the receipt of the notice, the Employer may by further notice to the Consultant determine the employment of the Consultant under this Agreement.

Termination by Consultant: If the Employer makes default by failing to pay the due amount by the final date, interferes with the carrying out of the works or fails to comply with the requirements of any relevant Health and Safety regulations, then the Consultant may give notice to the Employer specifying the default. If the default is not ended in 7 days the Consultant may by further notice to the Employer, determine the employment of the Consultant under this Agreement.

Upon termination of the employment of the Consultant, they shall prepare an account setting out the value of work properly carried out and the costs of withdrawing from the study. Work carried out up until the termination shall be the property of Rother District Council and shall be handed over to the Council.

Appendix B

Sites Plan



Scale:	1: 2,500
Date:	May 2010
Job No.	J01
Drawn By	JP
Authorised By	AJ

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A Sainsbury Redevelopment

B Beeching Road (South)

C Beeching Road (North)

Town Centre Boundary

Walking Route

1 - Sainsbury; 2 - Co-op; 3 - Somerfield; 4 - Aldi

Sites Plan,Bexhill

N

20 Soho Square
London W1D 3QW
Tel 0207 851 4900

GL HEARN

Appendix C

Retail Turnover Impact Tables

TABLE A: Study Area Populations

				Study Zones				
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total	649
								783
Share of Population Growth	24%	29%	15%	9%	9%	15%	100%	
Study Zones								
2001	16,050	28,653	8,269	12,441	15,526	7,087	88,026	
2006	16,552	29,260	8,572	12,629	15,714	7,390	90,119	
2008	16,628	29,352	8,618	12,658	15,743	7,436	90,435	
2010	16,871	29,645	8,765	12,749	15,834	7,583	91,446	
2011	16,932	29,718	8,802	12,772	15,857	7,620	91,699	
2012	16,993	29,792	8,839	12,795	15,880	7,657	91,954	
2013	17,042	29,851	8,868	12,813	15,898	7,686	92,159	
2014	17,081	29,899	8,892	12,828	15,913	7,710	92,322	
2015	17,112	29,937	8,911	12,839	15,924	7,729	92,453	
2016	*17,238*	*30,089*	*8,987*	*12,887*	*15,972*	*7,805*	*92,976*	
2021	*17,506*	*30,412*	*9,148*	*12,987*	*16,072*	*7,966*	*94,091*	
2026	*17,822*	*30,794*	*9,340*	*13,105*	*16,190*	*8,158*	*95,409*	

Source: 2001 Census, Experian Retail Planner, East Sussex County Council ESiF & Rother District Council

Council Figs Here

																	85428	
3611	4624	5199	4910	3360	2765	3157	4966	5917	5679	5422	7031	6479	5784	5534	4862	4222	**83522**	
3657	4139	5245	5303	3509	2644	3211	3958	5495	6143	5822	5745	7513	6859	5814	5093	4021	**84171**	649
3571	4179	4755	5342	3859	2761	3082	4006	4486	5720	6276	6137	6279	7872	6861	5433	4335	**84954**	783
3554	4095	4792	4846	3867	3098	3194	3883	4531	4720	5856	6589	6672	6716	7838	6429	4712	**85392**	438
3510	4116	4741	4909	3389	3137	3575	4047	4451	4792	4895	6215	7149	7133	6802	7357	5633	**85851**	459

County Projections for Rother

2001	85471		85471	
2006	87564	2093	88100	2629
2011	89144	1580	90700	2600
2016	90421	1277	93800	3100
2021	91536	1115	97300	3500
2026	92854	1318	101000	3700

TABLE B: Expenditure Per Head - Total Convenience Goods

	Study Zones					
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair
Study Zones						
2008	£1,834	£2,039	£2,112	£2,034	£2,056	£2,106
2010	£1,860	£2,068	£2,142	£2,063	£2,085	£2,136
2011	£1,873	£2,082	£2,157	£2,077	£2,099	£2,151
2012	£1,886	£2,097	£2,172	£2,092	£2,114	£2,166
2013	£1,899	£2,111	£2,187	£2,106	£2,129	£2,181
2014	£1,912	£2,126	£2,202	£2,121	£2,144	£2,196
2015	£1,926	£2,141	£2,218	£2,136	£2,159	£2,211

TABLE C: Convenience Goods Expenditure Generated

	Study Zones						
Study Years	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
2008	£30,496,045	£59,847,933	£18,201,860	£25,745,986	£32,367,217	£15,660,858	£182,319,900
2010	£31,375,827	£61,295,069	£18,771,599	£26,295,402	£33,011,686	£16,194,006	£186,943,589
2015	£32,954,765	£64,095,728	£19,761,599	£27,422,232	£34,378,993	£17,091,600	£195,704,917

Source:

Table D: Expenditure Per Head - Total Comparison Goods

	Study Zones					
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair
Study Zones						
2008	£2,911	£3,086	£3,488	£3,258	£3,205	£3,179
2010	£3,191	£3,383	£3,824	£3,571	£3,513	£3,485
2011	£3,341	£3,542	£4,003	£3,739	£3,678	£3,649
2012	£3,498	£3,708	£4,191	£3,915	£3,851	£3,820
2013	£3,662	£3,883	£4,388	£4,099	£4,032	£4,000
2014	£3,835	£4,065	£4,595	£4,292	£4,222	£4,188
2015	£4,015	£4,256	£4,811	£4,493	£4,420	£4,384

TABLE E: Comparison Goods Expenditure Generated

	Study Zones						
Study Years	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
2008	£48,404,574	£90,579,068	£30,060,648	£41,239,145	£50,455,706	£23,640,014	£284,379,155
2010	£53,835,962	£100,285,619	£33,513,381	£45,531,752	£55,629,742	£26,425,358	£315,221,815
2015	£68,703,928	£127,417,258	£42,867,201	£57,693,039	£70,391,230	£33,887,174	£400,959,831

Source:

TABLE F: Benchmark Turnovers of Proposed Stores

Store/Location	Sales Area sqm	% Convenience Goods %	Convenience Goods Sales Area sqm	Estimated Convenience Goods Sales Density £/sqm	Convenience Goods Benchmark Turnover £M	Estimated Comparison Goods Sales Density £/sqm	Comparison Goods Benchmark Turnover £M
Sainsbury Redevelopment	3,900	75%	2,925	£9,735	£28,475,457.48	£5,153.93	£5,025,081
Existing Sainsbury	*1,467*	*85%*	*1,247*	*£9,196*	*£11,470,739.28*	*£5,153.93*	*£1,134,469*
Sainsbury (New) Beeching Road South	5,575	65%	3,624	£10,440	£37,831,986.01	£5,153.93	£10,056,604
Sainsbury (New) Beeching Road North	5,575	65%	3,624	£10,440	£37,831,986.01	£5,153.93	£10,056,604
Waitrose Beeching Road South	2,323	85%	1,975	£11,789	£23,278,260.39	£6,607.10	£2,302,246
Morrisons Beeching Road South	2,973	80%	2,378	£11,071	£26,331,371.37	£6,038.75	£3,590,642

GOODS TRADING DENSITY ANALYSIS

company average density	*total store turnover at company average rate*	*comparison turnover*	*convenience turnover*	*convenience sales density*
£8,590	*£33,500,538*	*£5,025,081*	*£28,475,457*	*£9,735*
£8,590	*£12,605,208*	*£1,134,469*	*£11,470,739*	*£9,196*
£8,590	*£47,888,590*	*£10,056,604*	*£37,831,986*	*£10,440*
£8,590	*£47,888,590*	*£10,056,604*	*£37,831,986*	*£10,440*
£11,012	*£25,580,506*	*£2,302,246*	*£23,278,260*	*£11,789*
£10,065	*£29,922,013*	*£3,590,642*	*£26,331,371*	*£11,071*

TABLE G: Conveneince Shopping Market Shares 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	29.20%	24.00%	0.00%	0.23%	0.00%	0.00%	12.81%
Somerfield, Bexhill, Devonshire Rd	7.78%	2.46%	0.00%	0.00%	0.24%	0.00%	2.16%
Aldi, Bexhill, London Rd	4.03%	4.51%	0.00%	0.47%	0.00%	0.00%	2.20%
Co-op, Bexhill, Western Rd	3.13%	2.45%	0.00%	0.00%	0.11%	0.00%	1.34%
Local Store, Bexhill	5.92%	2.86%	0.41%	0.00%	0.00%	0.00%	1.97%
Bexhill Town Centre	50.05%	36.29%	0.41%	0.70%	0.35%	0.00%	20.48%
Budgen/Jempson, Battle, Market Square	0.00%	1.43%	0.00%	12.00%	0.00%	0.59%	2.59%
Co-op, Battle, High St	0.16%	0.13%	0.00%	1.38%	0.00%	0.00%	0.26%
Local Store, Battle	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.20%
Battle Town Centre	0.16%	1.55%	0.00%	14.78%	0.00%	0.59%	3.05%
Jempson/Budgen, Rye, Station Approach	0.00%	0.00%	0.00%	0.23%	13.20%	0.00%	2.59%
Local Store, Rye	0.00%	0.00%	0.00%	0.00%	6.30%	1.08%	1.25%
Rye Town Centre	0.00%	0.00%	0.00%	0.23%	19.50%	1.08%	3.84%
Lidl, Sidley, Ninfield Rd	1.95%	3.98%	0.00%	0.70%	0.11%	0.00%	1.73%
Local Store, Sidley	0.23%	1.06%	0.00%	0.00%	0.00%	0.00%	0.38%
Co-op, Sidley, Ninfield Rd	1.25%	1.77%	0.00%	0.00%	0.00%	0.00%	0.78%
Sidley District Centre, Bexhill	3.42%	6.82%	0.00%	0.70%	0.11%	0.00%	2.88%
Co-op, Little Common, Cooden Sea Rd	0.00%	4.70%	0.00%	0.00%	1.36%	0.00%	1.75%
Local Store, Little Common	0.48%	1.40%	0.00%	0.00%	0.00%	0.00%	0.53%
Little Common District Centre, Bexhill	0.48%	6.10%	0.00%	0.00%	1.36%	0.00%	2.28%
Tesco, Bexhill, Collington Ave	1.72%	3.24%	0.00%	0.47%	0.11%	0.79%	1.48%
Jempson, Peasmarsh, Main St	0.00%	0.21%	1.27%	1.41%	14.00%	1.28%	3.55%
Tesco, Bexhill, Ravenside	34.00%	21.94%	1.25%	3.10%	0.67%	0.79%	14.14%
Tesco Express, Battle, Battle Hill	0.00%	0.70%	0.00%	3.90%	0.24%	0.59%	0.88%
Out Of Centre Stores In Rother	35.72%	26.09%	2.52%	8.88%	15.02%	3.44%	20.05%
Local Store, Burwash	0.00%	0.00%	8.60%	0.23%	0.00%	0.00%	0.89%
Local Store, Robertsbridge	0.16%	0.00%	0.00%	5.77%	0.00%	0.00%	0.84%
Local Stores/Londis, Ticehurst	0.00%	0.00%	7.44%	0.00%	0.00%	0.00%	0.74%
Local Store, Sedlescombe	0.00%	0.00%	0.00%	2.53%	0.00%	0.00%	0.36%
Local Store, Staplecross	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	0.12%
Local Store, Westfield	0.00%	0.00%	0.00%	0.00%	0.00%	1.77%	0.15%
Local Stores/Spar, Northiam	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.34%
Local Store, Catsfield	0.00%	0.58%	0.00%	0.29%	0.00%	0.00%	0.22%
Local Store, Fairlight	0.00%	0.00%	0.00%	0.00%	0.00%	8.80%	0.74%
Local Stores Winchelsea/Beach	0.00%	0.00%	0.00%	0.00%	1.37%	2.33%	0.45%
Local Store, Etchingham	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.37%
Local Store, Hurst Green	0.00%	0.00%	2.04%	0.29%	0.00%	0.00%	0.24%
Local Stores/Village Centres In Rother	0.16%	0.58%	21.79%	9.96%	3.21%	12.90%	5.48%
Asda, Eastbourne, Crumbles	2.10%	5.00%	0.87%	0.23%	0.00%	1.00%	2.35%
Sainsbury, Hastings, St Leonards, John Macadam	0.70%	2.50%	5.00%	20.00%	11.00%	17.60%	10.43%
Morrison, Hastings, Queens Road	0.47%	0.65%	0.80%	3.80%	4.08%	17.60%	3.59%
Tesco, Hastings, St Leonards, Churchwood Drive	0.90%	2.00%	5.00%	10.00%	5.00%	11.00%	5.45%
Asda, Silverhill, Hastings	*0.95%*	*2.5%*	*5.0%*	*17.0%*	*7.5%*	*13.0%*	
Large Stores Outside Rother with Significant I	5.12%	12.65%	16.67%	51.03%	27.58%	60.20%	21.82%
Asda, Ashford, Kimberley Way	0.00%	0.00%	0.00%	0.00%	1.00%	0.49%	0.33%
Budgen, Hawkhurst, Rye Rd	0.00%	0.13%	5.89%	1.22%	3.20%	0.59%	1.44%
Budgen, Heathfield, Station Rd	0.00%	0.07%	0.88%	0.00%	0.24%	0.00%	0.16%
Co-op, Eastbourne, Albert Parade	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Co-op, Hailsham, The Quintons	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Heathfield, High St	0.00%	0.00%	14.60%	0.70%	0.00%	0.00%	1.56%
Co-op, Ore, Fairlight Rd	0.00%	0.00%	0.00%	0.00%	0.11%	2.50%	0.26%
Co-op, Polegate, The Centre	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Co-op, St Leonards, London Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, St Leonards, Silverhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Tenterden, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Hailsham, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, St Leonards, Battle Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Tenterden, Ashford Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Wadhurst, Sparrows Green Rd	0.00%	0.00%	1.92%	0.00%	0.00%	0.00%	0.19%
Iceland, Hastings, Castle St	0.00%	0.00%	0.23%	0.00%	0.00%	1.00%	0.11%
Iceland, Ashford, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Road	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Iceland, Tunbridge Wells, Calverley Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Jempson, Battle, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, St Leonards, Bohemia Rd	0.00%	0.07%	0.00%	0.23%	0.80%	1.08%	0.29%
Local Store, Hastings	0.00%	0.00%	0.00%	1.60%	1.37%	1.18%	0.61%
Marks & Spencer, Eastbourne	0.23%	0.79%	0.00%	0.00%	0.00%	0.00%	0.29%
Marks & Spencer, Priory Meadow Shopping Centr	0.64%	0.21%	0.47%	0.23%	1.12%	1.67%	0.60%
Sainsbury, Ashford, Simon Well Ave	0.00%	0.07%	0.00%	0.00%	0.66%	0.00%	0.14%
Sainsbury, Eastbourne, Arndale Centre	0.00%	0.47%	0.00%	0.00%	0.11%	0.00%	0.17%
Sainsbury, Eastbourne, Hampden Park	0.00%	1.20%	0.87%	0.23%	0.00%	0.00%	0.50%
Sainsbury, New Romney, Dymchurch Rd	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	0.02%
Sainsbury, Tunbridge Wells, Linden Park Rd	0.00%	0.00%	6.94%	0.47%	0.00%	0.00%	0.76%
Sainsbury, Tunbridge Wells, St Johns Road	0.00%	0.00%	2.36%	0.47%	0.11%	0.79%	0.39%
Somerfield, Eastbourne, Brassey Ave	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Spar, Hawkhurst, The Moor	0.00%	0.00%	0.41%	0.80%	0.00%	0.59%	0.20%
Spar, St Leonards, Kings Rd	0.23%	0.00%	0.00%	0.00%	0.00%	0.59%	0.09%
Tesco, Ashford, Hythe Rd	0.00%	0.00%	0.00%	0.00%	3.48%	0.00%	0.64%
Tesco, Eastbourne, Kingfisher Drive, Langney Sh	0.86%	1.58%	0.63%	0.23%	0.00%	0.00%	0.75%
Tesco, Eastbourne, Lottbridge Drove	0.16%	0.70%	0.00%	0.00%	0.00%	0.00%	0.25%
Tesco, St Leonards, Silverhill	0.00%	0.07%	0.00%	1.00%	0.23%	1.28%	0.41%
Tesco, Tenterden, Smallhythe Rd	0.00%	0.00%	0.87%	0.70%	11.07%	0.00%	2.22%
Tesco, Tunbridge Wells, Pembury Rd	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.28%
Tesco Express, Heathfield, Station Rd	0.23%	0.00%	0.23%	0.29%	0.00%	0.00%	0.10%
Tesco Express, St Leonards, Fernside Avenue	0.00%	0.21%	0.00%	0.00%	0.00%	0.00%	0.07%
Waitrose, Eastbourne, High St	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.16%
Waitrose, Hailsham, Vicarage Field	0.32%	1.21%	0.23%	0.00%	0.11%	0.00%	0.49%
Waitrose, Tenterden, High St	0.00%	0.00%	0.23%	0.23%	3.14%	0.79%	0.70%
Waitrose, Crowborough	0.00%	0.00%	0.72%	0.00%	0.00%	0.00%	0.07%
Other	1.30%	2.29%	13.00%	4.00%	5.14%	9.21%	4.75%
Other Stores/Locations Outside Rother	4.42%	9.72%	53.24%	12.42%	32.01%	21.78%	19.11%
* Internet/Home Delivery - Ocado/Waitrose	0.16%	0.00%	1.50%	0.76%	0.43%	0.00%	0.36%
* Internet/Home Delivery - Tesco	0.32%	0.14%	3.24%	0.52%	0.43%	0.00%	0.57%
* Internet/Home Delivery - Sainsburys	0.00%	0.07%	0.63%	0.00%	0.00%	0.00%	0.09%
Internet Home Delivery Channels	0.47%	0.21%	5.37%	1.28%	0.86%	0.00%	1.02%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Turnovers 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£9,622,791	£15,382,975	£0	£63,324	£0	£0	£25,069,089
Somerfield, Bexhill, Devonshire Rd	£2,562,234	£1,578,071	£0	£0	£81,510	£0	£4,221,814
Aldi, Bexhill, London Rd	£1,329,010	£2,893,124	£0	£129,638	£0	£0	£4,351,773
Co-op, Bexhill, Western Rd	£1,030,455	£1,568,583	£0	£0	£39,364	£0	£2,638,401
Local Store, Bexhill	£1,950,381	£1,834,738	£80,744	£0	£0	£0	£3,865,863
Bexhill Town Centre	£16,494,872	£23,257,490	£80,744	£192,962	£120,873	£0	£40,146,941
Budgen/Jempson, Battle, Market Square	£0	£916,179	£0	£3,290,668	£0	£100,904	£4,307,751
Co-op, Battle, High St	£51,893	£80,127	£0	£377,702	£0	£0	£509,722
Local Store, Battle	£0	£0	£0	£385,828	£0	£0	£385,828
Battle Town Centre	£51,893	£996,306	£0	£4,054,197	£0	£100,904	£5,203,301
Jempson/Budgen, Rye, Station Approach	£0	£0	£0	£63,324	£4,538,027	£0	£4,601,351
Local Store, Rye	£0	£0	£0	£0	£2,164,886	£185,350	£2,350,236
Rye Town Centre	£0	£0	£0	£63,324	£6,702,913	£185,350	£6,951,587
Lidl, Sidley, Ninfield Rd	£643,039	£2,553,953	£0	£192,962	£39,364	£0	£3,429,318
Local Store, Sidley	£74,599	£680,860	£0	£0	£0	£0	£755,459
Co-op, Sidley, Ninfield Rd	£410,602	£1,135,804	£0	£0	£0	£0	£1,546,406
Sidley District Centre, Bexhill	£1,128,240	£4,370,617	£0	£192,962	£39,364	£0	£5,731,183
Co-op, Little Common, Cooden Sea Rd	£0	£3,010,266	£0	£0	£468,162	£0	£3,478,427
Local Store, Little Common	£157,487	£897,425	£0	£0	£0	£0	£1,054,912
Little Common District Centre, Bexhill	£157,487	£3,907,690	£0	£0	£468,162	£0	£4,533,339
Tesco, Bexhill, Collington Ave	£566,412	£2,077,848	£0	£129,638	£39,364	£134,455	£2,947,717
Jempson, Peasmarsh, Main St	£0	£134,389	£251,807	£385,923	£4,813,059	£218,901	£5,804,080
Tesco, Bexhill, Ravenside	£11,204,620	£14,062,603	£247,020	£850,441	£229,281	£134,455	£26,728,420
Tesco Express, Battle, Battle Hill	£0	£448,712	£0	£1,069,467	£81,510	£100,904	£1,700,593
Out Of Centre Stores In Rother	£11,771,032	£16,723,552	£498,827	£2,435,469	£5,163,213	£588,716	£37,180,810
Local Store, Burwash	£0	£0	£1,699,683	£63,324	£0	£0	£1,763,007
Local Store, Robertsbridge	£51,893	£0	£0	£1,583,237	£0	£0	£1,635,131
Local Stores/Londis, Ticehurst	£0	£0	£1,469,574	£0	£0	£0	£1,469,574
Local Store, Sedlescombe	£0	£0	£0	£693,061	£0	£0	£693,061
Local Store, Staplecross	£0	£0	£0	£235,784	£0	£0	£235,784
Local Store, Westfield	£0	£0	£0	£0	£0	£302,713	£302,713
Local Stores/Spar, Northiam	£0	£0	£0	£0	£633,963	£0	£633,963
Local Store, Catsfield	£0	£368,585	£0	£78,595	£0	£0	£447,180
Local Store, Fairlight	£0	£0	£0	£0	£0	£1,503,957	£1,503,957
Local Stores Winchelsea/Beach	£0	£0	£0	£0	£470,944	£398,813	£869,757
Local Store, Etchingham	£0	£0	£732,467	£0	£0	£0	£732,467
Local Store, Hurst Green	£0	£0	£403,722	£78,595	£0	£0	£482,316
Local Stores/Village Centres In Rother	£51,893	£368,585	£4,305,446	£2,732,594	£1,104,907	£2,205,483	£10,768,908
Asda, Eastbourne, Crumbles	£692,050	£3,204,786	£171,063	£63,324	£0	£170,916	£4,302,139
Sainsbury, Hastings, St Leonards, John Macadam	£230,409	£1,602,393	£988,080	£5,484,446	£3,781,689	£3,008,122	£15,095,140
Morrison, Hastings, Queens Road	£155,680	£417,601	£158,093	£1,042,045	£1,402,803	£3,008,122	£6,184,343
Tesco, Hastings, St Leonards, Churchwood Drive	£296,593	£1,281,915	£988,080	£2,742,223	£1,718,950	£1,880,076	£8,907,836
Asda, Silverhill, Hastings	£313,070	£1,602,393	£988,080	£4,661,779	£2,578,424	£2,221,908	£12,365,655
Large Stores Outside Rother with Significant Influ	£1,687,803	£8,109,089	£3,293,396	£13,993,818	£9,481,866	£10,289,143	£46,855,114
Asda, Ashford, Kimberley Way	£0	£0	£0	£0	£343,790	£84,446	£428,236
Budgen, Hawkhurst, Rye Rd	£0	£80,127	£1,163,619	£334,880	£1,098,754	£100,904	£2,778,284
Budgen, Heathfield, Station Rd	£0	£48,031	£173,612	£0	£81,510	£0	£303,152
Co-op, Eastbourne, Albert Parade	£0	£80,127	£0	£0	£0	£0	£80,127
Co-op, Hailsham, The Quintons	£0	£0	£0	£0	£0	£0	£0
Co-op, Heathfield, High St	£0	£0	£2,885,987	£192,962	£0	£0	£3,078,949
Co-op, Ore, Fairlight Rd	£0	£0	£0	£0	£39,364	£427,290	£466,654
Co-op, Polegate, The Centre	£103,917	£0	£0	£0	£0	£0	£103,917
Co-op, St Leonards, London Rd	£0	£0	£0	£0	£0	£0	£0
Co-op, St Leonards, Silverhill	£0	£0	£0	£0	£0	£0	£0
Co-op, Tenterden, High St	£0	£0	£0	£0	£0	£0	£0
Costcutter, Hailsham, High St	£0	£0	£0	£0	£0	£0	£0
Costcutter, St Leonards, Battle Rd	£0	£0	£0	£0	£0	£0	£0
Costcutter, Tenterden, Ashford Rd	£0	£0	£0	£0	£0	£0	£0
Costcutter, Wadhurst, Sparrows Green Rd	£0	£0	£378,986	£0	£0	£0	£378,986
Iceland, Hastings, Castle St	£0	£0	£46,434	£0	£0	£171,375	£217,809
Iceland, Ashford, High St	£0	£0	£0	£0	£0	£0	£0
Iceland, Eastbourne, Langney Centre	£0	£0	£0	£0	£0	£0	£0
Iceland, Eastbourne, Langney Road	£51,893	£0	£0	£0	£0	£0	£51,893
Iceland, Tunbridge Wells, Calverley Rd	£0	£0	£0	£0	£0	£0	£0
Jempson, Battle, High St	£0	£0	£0	£0	£0	£0	£0
Lidl, St Leonards, Bohemia Rd	£0	£48,031	£0	£63,324	£274,247	£185,350	£570,951
Local Store, Hastings	£0	£0	£0	£438,756	£470,944	£201,809	£1,111,508
Marks & Spencer, Eastbourne	£74,599	£504,672	£0	£0	£0	£0	£579,271
Marks & Spencer, Priory Meadow Shopping Centr	£209,381	£136,086	£92,868	£63,324	£383,954	£286,255	£1,171,867
Sainsbury, Ashford, Simon Well Ave	£0	£48,031	£0	£0	£226,499	£0	£274,529
Sainsbury, Eastbourne, Arndale Centre	£0	£302,573	£0	£0	£39,364	£0	£341,936
Sainsbury, Eastbourne, Hampden Park	£0	£769,901	£171,063	£63,324	£0	£0	£1,004,288
Sainsbury, New Romney, Dymchurch Rd	£0	£0	£0	£0	£39,364	£0	£39,364
Sainsbury, Tunbridge Wells, Linden Park Rd	£0	£0	£1,371,083	£129,638	£0	£0	£1,500,722
Sainsbury, Tunbridge Wells, St Johns Road	£0	£0	£466,755	£129,638	£39,364	£134,455	£770,212
Somerfield, Eastbourne, Brassey Ave	£0	£0	£0	£0	£0	£0	£0
Spar, Hawkhurst, The Moor	£0	£0	£80,744	£220,513	£0	£100,904	£402,161
Spar, St Leonards, Kings Rd	£74,599	£0	£0	£0	£0	£100,904	£175,504
Tesco, Ashford, Hythe Rd	£0	£0	£0	£0	£1,197,011	£0	£1,197,011
Tesco, Eastbourne, Kingfisher Drive, Langney Sh	£282,303	£1,013,225	£124,629	£63,324	£0	£0	£1,483,480
Tesco, Eastbourne, Lottbridge Drove	£51,893	£446,664	£0	£0	£0	£0	£498,557
Tesco, St Leonards, Silverhill	£0	£48,031	£0	£274,222	£78,727	£218,901	£619,881
Tesco, Tenterden, Smallhythe Rd	£0	£0	£171,063	£192,962	£3,805,250	£0	£4,169,275
Tesco, Tunbridge Wells, Pembury Rd	£0	£0	£544,950	£0	£0	£0	£544,950
Tesco Express, Heathfield, Station Rd	£74,599	£0	£46,434	£78,595	£0	£0	£199,628
Tesco Express, St Leonards, Fernside Avenue	£0	£134,389	£0	£0	£0	£0	£134,389
Waitrose, Eastbourne, High St	£0	£323,237	£0	£0	£0	£0	£323,237
Waitrose, Hailsham, Vicarage Field	£103,917	£778,044	£46,434	£0	£39,364	£0	£967,758
Waitrose, Tenterden, High St	£0	£0	£46,434	£63,324	£1,078,920	£134,455	£1,323,133
Waitrose, Crowborough	£0	£0	£141,882	£0	£0	£0	£141,882
Other	£428,412	£1,466,531	£2,569,008	£1,096,889	£1,767,080	£1,574,776	£8,902,696
Other Stores/Locations Outside Rother	£1,455,513	£6,227,700	£10,521,986	£3,405,671	£11,003,504	£3,721,825	£36,336,199
* Internet/Home Delivery - Ocado/Waitrose	£51,893	£0	£295,692	£208,233	£147,771	£0	£703,589
* Internet/Home Delivery - Tesco	£103,917	£88,056	£640,398	£141,918	£147,771	£0	£1,122,059
* Internet/Home Delivery - Sainsburys	£0	£48,031	£124,629	£0	£0	£0	£172,659
Internet Home Delivery Channels	£155,810	£136,086	£1,060,718	£350,151	£295,543	£0	£1,998,308

TABLE H: Conveneince Market Shares 2015 with Sainsbury On Site Redevelopment

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
Sainsbury On Site Redevelopment	***31.11%***	***25.81%***	***0.14%***	***0.31%***	***0.00%***	***0.00%***	
Sainsbury, Bexhill, Buckhurst Place - Closed	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Somerfield, Bexhill, Devonshire Rd	7.60%	2.40%	0.00%	0.00%	0.24%	0.00%	2.16%
Aldi, Bexhill, London Rd	4.00%	4.50%	0.00%	0.45%	0.00%	0.00%	2.20%
Co-op, Bexhill, Western Rd	3.10%	2.45%	0.00%	0.00%	0.11%	0.00%	1.34%
Local Store, Bexhill	5.50%	2.80%	0.39%	0.00%	0.00%	0.00%	1.97%
Bexhill Town Centre	20.20%	12.15%	0.39%	0.45%	0.35%	0.00%	7.67%
Budgen/Jempson, Battle, Market Square	0.00%	1.43%	0.00%	12.00%	0.00%	0.59%	2.59%
Co-op, Battle, High St	0.16%	0.13%	0.00%	1.38%	0.00%	0.00%	0.26%
Local Store, Battle	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.20%
Battle Town Centre	0.16%	1.55%	0.00%	14.78%	0.00%	0.59%	3.05%
Jempson/Budgen, Rye, Station Approach	0.00%	0.00%	0.00%	0.23%	13.20%	0.00%	2.59%
Local Store, Rye	0.00%	0.00%	0.00%	0.00%	6.30%	1.08%	1.25%
Rye Town Centre	0.00%	0.00%	0.00%	0.23%	19.50%	1.08%	3.84%
Lidl, Sidley, Ninfield Rd	1.90%	3.95%	0.00%	0.70%	0.11%	0.00%	1.73%
Local Store, Sidley	0.23%	1.06%	0.00%	0.00%	0.00%	0.00%	0.38%
Co-op, Sidley, Ninfield Rd	1.25%	1.77%	0.00%	0.00%	0.00%	0.00%	0.78%
Sidley District Centre, Bexhill	3.37%	6.78%	0.00%	0.70%	0.11%	0.00%	2.88%
Co-op, Little Common, Cooden Sea Rd	0.00%	4.70%	0.00%	0.00%	1.36%	0.00%	1.75%
Local Store, Little Common	0.48%	1.40%	0.00%	0.00%	0.00%	0.00%	0.53%
Little Common District Centre, Bexhill	0.48%	6.10%	0.00%	0.00%	1.36%	0.00%	2.28%
Tesco, Bexhill, Collington Ave	1.70%	3.24%	0.00%	0.47%	0.11%	0.79%	1.48%
Jempson, Peasmarsh, Main St	0.00%	0.21%	1.27%	1.41%	14.00%	1.28%	3.55%
Tesco, Bexhill, Ravenside	32.92%	21.00%	1.25%	3.10%	0.67%	0.79%	14.14%
Tesco Express, Battle, Battle Hill	0.00%	0.70%	0.00%	3.90%	0.24%	0.59%	0.88%
Out Of Centre Stores In Rother	34.62%	25.15%	2.52%	8.88%	15.02%	3.44%	20.05%
Local Store, Burwash	0.00%	0.00%	8.60%	0.23%	0.00%	0.00%	0.89%
Local Store, Robertsbridge	0.16%	0.00%	0.00%	5.77%	0.00%	0.00%	0.84%
Local Stores/Londis, Ticehurst	0.00%	0.00%	7.44%	0.00%	0.00%	0.00%	0.74%
Local Store, Sedlescombe	0.00%	0.00%	0.00%	2.53%	0.00%	0.00%	0.36%
Local Store, Staplecross	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	0.12%
Local Store, Westfield	0.00%	0.00%	0.00%	0.00%	0.00%	1.77%	0.15%
Local Stores/Spar, Northiam	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.34%
Local Store, Catsfield	0.00%	0.58%	0.00%	0.29%	0.00%	0.00%	0.22%
Local Store, Fairlight	0.00%	0.00%	0.00%	0.00%	0.00%	8.80%	0.74%
Local Stores Winchelsea/Beach	0.00%	0.00%	0.00%	0.00%	1.37%	2.33%	0.45%
Local Store, Etchingham	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.37%
Local Store, Hurst Green	0.00%	0.00%	2.04%	0.29%	0.00%	0.00%	0.24%
Local Stores/Village Centres In Rother	0.16%	0.58%	21.79%	9.96%	3.21%	12.90%	5.48%
Asda, Eastbourne, Crumbles	2.00%	4.30%	0.87%	0.23%	0.00%	1.00%	2.35%
Sainsbury, Hastings, St Leonards, John Macadam	0.70%	2.50%	4.88%	19.95%	11.00%	17.60%	10.43%
Morrison, Hastings, Queens Road	0.47%	0.65%	0.80%	3.80%	4.08%	17.60%	3.59%
Tesco, Hastings, St Leonards, Churchwood Drive	0.90%	2.00%	5.00%	10.00%	5.00%	11.00%	5.45%
Asda, Silverhill, Hastings	*0.95%*	*2.5%*	*5.0%*	*17.0%*	*7.5%*	*13.0%*	
Large Stores Outside Rother with Significant I	5.02%	11.95%	16.55%	50.98%	27.58%	60.20%	21.82%
Asda, Ashford, Kimberley Way	0.00%	0.00%	0.00%	0.00%	1.00%	0.49%	0.33%
Budgen, Hawkhurst, Rye Rd	0.00%	0.13%	5.89%	1.22%	3.20%	0.59%	1.44%
Budgen, Heathfield, Station Rd	0.00%	0.07%	0.88%	0.00%	0.24%	0.00%	0.16%
Co-op, Eastbourne, Albert Parade	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Co-op, Hailsham, The Quintons	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Heathfield, High St	0.00%	0.00%	14.60%	0.70%	0.00%	0.00%	1.56%
Co-op, Ore, Fairlight Rd	0.00%	0.00%	0.00%	0.00%	0.11%	2.50%	0.26%
Co-op, Polegate, The Centre	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Co-op, St Leonards, London Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, St Leonards, Silverhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Tenterden, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Hailsham, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, St Leonards, Battle Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Tenterden, Ashford Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Wadhurst, Sparrows Green Rd	0.00%	0.00%	1.92%	0.00%	0.00%	0.00%	0.19%
Iceland, Hastings, Castle St	0.00%	0.00%	0.23%	0.00%	0.00%	1.00%	0.11%
Iceland, Ashford, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Road	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Iceland, Tunbridge Wells, Calverley Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Jempson, Battle, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, St Leonards, Bohemia Rd	0.00%	0.07%	0.00%	0.23%	0.80%	1.08%	0.29%
Local Store, Hastings	0.00%	0.00%	0.00%	1.60%	1.37%	1.18%	0.61%
Marks & Spencer, Eastbourne	0.23%	0.79%	0.00%	0.00%	0.00%	0.00%	0.29%
Marks & Spencer, Priory Meadow Shopping Centr	0.64%	0.21%	0.47%	0.23%	1.12%	1.67%	0.60%
Sainsbury, Ashford, Simon Well Ave	0.00%	0.07%	0.00%	0.00%	0.66%	0.00%	0.14%
Sainsbury, Eastbourne, Arndale Centre	0.00%	0.47%	0.00%	0.00%	0.11%	0.00%	0.17%
Sainsbury, Eastbourne, Hampden Park	0.00%	1.20%	0.87%	0.23%	0.00%	0.00%	0.50%
Sainsbury, New Romney, Dymchurch Rd	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	0.02%
Sainsbury, Tunbridge Wells, Linden Park Rd	0.00%	0.00%	6.94%	0.47%	0.00%	0.00%	0.76%
Sainsbury, Tunbridge Wells, St Johns Road	0.00%	0.00%	2.36%	0.47%	0.11%	0.79%	0.39%
Somerfield, Eastbourne, Brassey Ave	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Spar, Hawkhurst, The Moor	0.00%	0.00%	0.41%	0.80%	0.00%	0.59%	0.20%
Spar, St Leonards, Kings Rd	0.23%	0.00%	0.00%	0.00%	0.00%	0.59%	0.09%
Tesco, Ashford, Hythe Rd	0.00%	0.00%	0.00%	0.00%	3.48%	0.00%	0.64%
Tesco, Eastbourne, Kingfisher Drive, Langney Sho	0.86%	1.58%	0.63%	0.23%	0.00%	0.00%	0.75%
Tesco, Eastbourne, Lottbridge Drove	0.16%	0.70%	0.00%	0.00%	0.00%	0.00%	0.25%
Tesco, St Leonards, Silverhill	0.00%	0.07%	0.00%	1.00%	0.23%	1.28%	0.41%
Tesco, Tenterden, Smallhythe Rd	0.00%	0.00%	0.87%	0.70%	11.07%	0.00%	2.22%
Tesco, Tunbridge Wells, Pembury Rd	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.28%
Tesco Express, Heathfield, Station Rd	0.23%	0.00%	0.23%	0.29%	0.00%	0.00%	0.10%
Tesco Express, St Leonards, Fernside Avenue	0.00%	0.21%	0.00%	0.00%	0.00%	0.00%	0.07%
Waitrose, Eastbourne, High St	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.16%
Waitrose, Hailsham, Vicarage Field	0.32%	1.21%	0.23%	0.00%	0.11%	0.00%	0.49%
Waitrose, Tenterden, High St	0.00%	0.00%	0.23%	0.23%	3.14%	0.79%	0.70%
Waitrose, Crowborough	0.00%	0.00%	0.72%	0.00%	0.00%	0.00%	0.07%
Other	1.30%	2.29%	13.00%	4.00%	5.14%	9.21%	4.75%
Other Stores/Locations Outside Rother	4.42%	9.72%	53.24%	12.42%	32.01%	21.78%	19.11%
* Internet/Home Delivery - Ocado/Waitrose	0.16%	0.00%	1.50%	0.76%	0.43%	0.00%	0.36%
* Internet/Home Delivery - Tesco	0.32%	0.14%	3.24%	0.52%	0.43%	0.00%	0.57%
* Internet/Home Delivery - Sainsburys	0.00%	0.07%	0.63%	0.00%	0.00%	0.00%	0.09%
Internet Home Delivery Channels	0.47%	0.21%	5.37%	1.28%	0.86%	0.00%	1.02%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	

Turnovers 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	*Study Area Total*	Beyond
Trade Draw	36.00%	58.10%	0.10%	0.30%	0.00%	0.00%	94.50%	5.50%
Sainsbury On-Site Redevelopment	**£10,251,165**	**£16,544,241**	**£28,475**	**£85,426**	**£0**	**£0**	***£28,475,457***	**£1,566,150**
Sainsbury, Bexhill, Buckhurst Place - Closed	£0	£0	£0	£0	£0	£0	£0	
Somerfield, Bexhill, Devonshire Rd	£2,504,562	£1,538,297	£0	£0	£81,510	£0	£4,124,369	
Aldi, Bexhill, London Rd	£1,318,191	£2,884,308	£0	£123,400	£0	£0	£4,325,898	
Co-op, Bexhill, Western Rd	£1,021,598	£1,570,345	£0	£0	£39,364	£0	£2,631,307	
Local Store, Bexhill	£1,812,512	£1,794,680	£77,070	£0	£0	£0	£3,684,263	
Bexhill Town Centre	£6,656,863	£7,787,631	£77,070	£123,400	£120,873	£0	£14,765,837	
Budgen/Jempson, Battle, Market Square	£0	£916,179	£0	£3,290,668	£0	£100,904	£4,307,751	
Co-op, Battle, High St	£51,893	£80,127	£0	£377,702	£0	£0	£509,722	
Local Store, Battle	£0	£0	£0	£385,828	£0	£0	£385,828	
Battle Town Centre	£51,893	£996,306	£0	£4,054,197	£0	£100,904	£5,203,301	
Jempson/Budgen, Rye, Station Approach	£0	£0	£0	£63,324	£4,538,027	£0	£4,601,351	
Local Store, Rye	£0	£0	£0	£0	£2,164,886	£185,350	£2,350,236	
Rye Town Centre	£0	£0	£0	£63,324	£6,702,913	£185,350	£6,951,587	
Lidl, Sidley, Ninfield Rd	£626,141	£2,531,781	£0	£192,962	£39,364	£0	£3,390,247	
Local Store, Sidley	£74,599	£680,860	£0	£0	£0	£0	£755,459	
Co-op, Sidley, Ninfield Rd	£410,602	£1,135,804	£0	£0	£0	£0	£1,546,406	
Sidley District Centre, Bexhill	£1,111,342	£4,348,445	£0	£192,962	£39,364	£0	£5,692,112	
Co-op, Little Common, Cooden Sea Rd	£0	£3,010,266	£0	£0	£468,162	£0	£3,478,427	
Local Store, Little Common	£157,487	£897,425	£0	£0	£0	£0	£1,054,912	
Little Common District Centre, Bexhill	£157,487	£3,907,690	£0	£0	£468,162	£0	£4,533,339	
Tesco, Bexhill, Collington Ave	£560,231	£2,077,848	£0	£129,638	£39,364	£134,455	£2,941,536	
Jempson, Peasmarsh, Main St	£0	£134,389	£251,807	£385,923	£4,813,059	£218,901	£5,804,080	
Tesco, Bexhill, Ravenside	£10,848,709	£13,460,103	£247,020	£850,441	£229,281	£134,455	£25,770,008	
Tesco Express, Battle, Battle Hill	£0	£448,712	£0	£1,069,467	£81,510	£100,904	£1,700,593	
Out Of Centre Stores In Rother	£11,408,940	£16,121,052	£498,827	£2,435,469	£5,163,213	£588,716	£36,216,218	
Local Store, Burwash	£0	£0	£1,699,683	£63,324	£0	£0	£1,763,007	
Local Store, Robertsbridge	£51,893	£0	£0	£1,583,237	£0	£0	£1,635,131	
Local Stores/Londis, Ticehurst	£0	£0	£1,469,574	£0	£0	£0	£1,469,574	
Local Store, Sedlescombe	£0	£0	£0	£693,061	£0	£0	£693,061	
Local Store, Staplecross	£0	£0	£0	£235,784	£0	£0	£235,784	
Local Store, Westfield	£0	£0	£0	£0	£0	£302,713	£302,713	
Local Stores/Spar, Northiam	£0	£0	£0	£0	£633,963	£0	£633,963	
Local Store, Catsfield	£0	£368,585	£0	£78,595	£0	£0	£447,180	
Local Store, Fairlight	£0	£0	£0	£0	£0	£1,503,957	£1,503,957	
Local Stores Winchelsea/Beach	£0	£0	£0	£0	£470,944	£398,813	£869,757	
Local Store, Etchingham	£0	£0	£732,467	£0	£0	£0	£732,467	
Local Store, Hurst Green	£0	£0	£403,722	£78,595	£0	£0	£482,316	
Local Stores/Village Centres In Rother	£51,893	£368,585	£4,305,446	£2,732,594	£1,104,907	£2,205,483	£10,768,908	
Asda, Eastbourne, Crumbles	£659,095	£2,756,116	£171,063	£63,324	£0	£170,916	£3,820,514	
Sainsbury, Hastings, St Leonards, John Macadam	£230,409	£1,602,393	£964,366	£5,470,735	£3,781,689	£3,008,122	£15,057,715	
Morrison, Hastings, Queens Road	£155,680	£417,601	£158,093	£1,042,045	£1,402,803	£3,008,122	£6,184,343	
Tesco, Hastings, St Leonards, Churchwood Drive	£296,593	£1,281,915	£988,080	£2,742,223	£1,718,950	£1,880,076	£8,907,836	
Asda, Silverhill, Hastings	£313,070	£1,602,393	£988,080	£4,661,779	£2,578,424	£2,221,908	£12,365,655	
Large Stores Outside Rother with Significant Influe	£1,654,848	£7,660,418	£3,269,682	£13,980,106	£9,481,866	£10,289,143	£46,336,064	
Asda, Ashford, Kimberley Way	£0	£0	£0	£0	£343,790	£84,446	£428,236	
Budgen, Hawkhurst, Rye Rd	£0	£80,127	£1,163,619	£334,880	£1,098,754	£100,904	£2,778,284	
Budgen, Heathfield, Station Rd	£0	£48,031	£173,612	£0	£81,510	£0	£303,152	
Co-op, Eastbourne, Albert Parade	£0	£80,127	£0	£0	£0	£0	£80,127	
Co-op, Hailsham, The Quintons	£0	£0	£0	£0	£0	£0	£0	
Co-op, Heathfield, High St	£0	£0	£2,885,987	£192,962	£0	£0	£3,078,949	
Co-op, Ore, Fairlight Rd	£0	£0	£0	£0	£39,364	£427,290	£466,654	
Co-op, Polegate, The Centre	£103,917	£0	£0	£0	£0	£0	£103,917	
Co-op, St Leonards, London Rd	£0	£0	£0	£0	£0	£0	£0	
Co-op, St Leonards, Silverhill	£0	£0	£0	£0	£0	£0	£0	
Co-op, Tenterden, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Hailsham, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, St Leonards, Battle Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Tenterden, Ashford Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Wadhurst, Sparrows Green Rd	£0	£0	£378,986	£0	£0	£0	£378,986	
Iceland, Hastings, Castle St	£0	£0	£46,434	£0	£0	£171,375	£217,809	
Iceland, Ashford, High St	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Centre	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Road	£51,893	£0	£0	£0	£0	£0	£51,893	
Iceland, Tunbridge Wells, Calverley Rd	£0	£0	£0	£0	£0	£0	£0	
Jempson, Battle, High St	£0	£0	£0	£0	£0	£0	£0	
Lidl, St Leonards, Bohemia Rd	£0	£48,031	£0	£63,324	£274,247	£185,350	£570,951	
Local Store, Hastings	£0	£0	£0	£438,756	£470,944	£201,809	£1,111,508	
Marks & Spencer, Eastbourne	£74,599	£504,672	£0	£0	£0	£0	£579,271	
Marks & Spencer, Priory Meadow Shopping Centr	£209,381	£136,086	£92,868	£63,324	£383,954	£286,255	£1,171,867	
Sainsbury, Ashford, Simon Well Ave	£0	£48,031	£0	£0	£226,499	£0	£274,529	
Sainsbury, Eastbourne, Arndale Centre	£0	£302,573	£0	£0	£39,364	£0	£341,936	
Sainsbury, Eastbourne, Hampden Park	£0	£769,901	£171,063	£63,324	£0	£0	£1,004,288	
Sainsbury, New Romney, Dymchurch Rd	£0	£0	£0	£0	£39,364	£0	£39,364	
Sainsbury, Tunbridge Wells, Linden Park Rd	£0	£0	£1,371,083	£129,638	£0	£0	£1,500,722	
Sainsbury, Tunbridge Wells, St Johns Road	£0	£0	£466,755	£129,638	£39,364	£134,455	£770,212	
Somerfield, Eastbourne, Brassey Ave	£0	£0	£0	£0	£0	£0	£0	
Spar, Hawkhurst, The Moor	£0	£0	£80,744	£220,513	£0	£100,904	£402,161	
Spar, St Leonards, Kings Rd	£74,599	£0	£0	£0	£0	£100,904	£175,504	
Tesco, Ashford, Hythe Rd	£0	£0	£0	£0	£1,197,011	£0	£1,197,011	
Tesco, Eastbourne, Kingfisher Drive, Langney Sho	£282,303	£1,013,225	£124,629	£63,324	£0	£0	£1,483,480	
Tesco, Eastbourne, Lottbridge Drove	£51,893	£446,664	£0	£0	£0	£0	£498,557	
Tesco, St Leonards, Silverhill	£0	£48,031	£0	£274,222	£78,727	£218,901	£619,881	
Tesco, Tenterden, Smallhythe Rd	£0	£0	£171,063	£192,962	£3,805,250	£0	£4,169,275	
Tesco, Tunbridge Wells, Pembury Rd	£0	£0	£544,950	£0	£0	£0	£544,950	
Tesco Express, Heathfield, Station Rd	£74,599	£0	£46,434	£78,595	£0	£0	£199,628	
Tesco Express, St Leonards, Fernside Avenue	£0	£134,389	£0	£0	£0	£0	£134,389	
Waitrose, Eastbourne, High St	£0	£323,237	£0	£0	£0	£0	£323,237	
Waitrose, Hailsham, Vicarage Field	£103,917	£778,044	£46,434	£0	£39,364	£0	£967,758	
Waitrose, Tenterden, High St	£0	£0	£46,434	£63,324	£1,078,920	£134,455	£1,323,133	
Waitrose, Crowborough	£0	£0	£141,882	£0	£0	£0	£141,882	
Other	£428,412	£1,466,531	£2,569,008	£1,096,889	£1,767,080	£1,574,776	£8,902,696	
Other Stores/Locations Outside Rother	£1,455,513	£6,227,700	£10,521,986	£3,405,671	£11,003,504	£3,721,825	£36,336,199	
* Internet/Home Delivery - Ocado/Waitrose	£51,893	£0	£295,692	£208,233	£147,771	£0	£703,589	
* Internet/Home Delivery - Tesco	£103,917	£88,056	£640,398	£141,918	£147,771	£0	£1,122,059	
* Internet/Home Delivery - Sainsburys	£0	£48,031	£124,629	£0	£0	£0	£172,659	
Internet Home Delivery Channels	£155,810	£136,086	£1,060,718	£350,151	£295,543	£0	£1,998,308	
	£22,704,589	£47,553,914	£19,733,729	£27,337,874	£34,380,345	£17,091,422		

TABLE I: Conveneince Market Shares 2015 with New Sainsbury at Beeching Road

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
New Sainsbury, Beeching Road South	***40.18%***	***31.28%***	***0.96%***	***1.38%***	***0.28%***	***0.55%***	
Sainsbury, Bexhill, Buckhurst Place	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Somerfield, Bexhill, Devonshire Rd	7.00%	2.30%	0.00%	0.00%	0.20%	0.00%	2.16%
Aldi, Bexhill, London Rd	3.80%	4.35%	0.00%	0.47%	0.00%	0.00%	2.20%
Co-op, Bexhill, Western Rd	3.00%	2.40%	0.00%	0.00%	0.10%	0.00%	1.34%
Local Store, Bexhill	5.00%	2.70%	0.40%	0.00%	0.00%	0.00%	1.97%
Bexhill Town Centre	18.80%	11.75%	0.40%	0.47%	0.30%	0.00%	7.67%
Budgen/Jempson, Battle, Market Square	0.00%	1.40%	0.00%	11.50%	0.00%	0.55%	2.59%
Co-op, Battle, High St	0.16%	0.13%	0.00%	1.38%	0.00%	0.00%	0.26%
Local Store, Battle	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.20%
Battle Town Centre	0.16%	1.53%	0.00%	14.28%	0.00%	0.55%	3.05%
Jempson/Budgen, Rye, Station Approach	0.00%	0.00%	0.00%	0.23%	13.20%	0.00%	2.59%
Local Store, Rye	0.00%	0.00%	0.00%	0.00%	6.30%	1.08%	1.25%
Rye Town Centre	0.00%	0.00%	0.00%	0.23%	19.50%	1.08%	3.84%
Lidl, Sidley, Ninfield Rd	1.80%	3.90%	0.00%	0.70%	0.10%	0.00%	1.73%
Local Store, Sidley	0.20%	1.00%	0.00%	0.00%	0.00%	0.00%	0.38%
Co-op, Sidley, Ninfield Rd	1.20%	1.70%	0.00%	0.00%	0.00%	0.00%	0.78%
Sidley District Centre, Bexhill	3.20%	6.60%	0.00%	0.70%	0.10%	0.00%	2.88%
Co-op, Little Common, Cooden Sea Rd	0.00%	4.60%	0.00%	0.00%	1.33%	0.00%	1.75%
Local Store, Little Common	0.40%	1.40%	0.00%	0.00%	0.00%	0.00%	0.53%
Little Common District Centre, Bexhill	0.40%	6.00%	0.00%	0.00%	1.33%	0.00%	2.28%
Tesco, Bexhill, Collington Ave	1.60%	3.10%	0.00%	0.47%	0.10%	0.75%	1.48%
Jempson, Peasmarsh, Main St	0.00%	0.21%	1.27%	1.41%	14.00%	1.28%	3.55%
Tesco, Bexhill, Ravenside	26.00%	18.00%	1.20%	3.00%	0.60%	0.70%	14.14%
Tesco Express, Battle, Battle Hill	0.00%	0.70%	0.00%	3.90%	0.24%	0.59%	0.88%
Out Of Centre Stores In Rother	27.60%	22.01%	2.47%	8.78%	14.94%	3.32%	20.05%
Local Store, Burwash	0.00%	0.00%	8.60%	0.23%	0.00%	0.00%	0.89%
Local Store, Robertsbridge	0.16%	0.00%	0.00%	5.77%	0.00%	0.00%	0.84%
Local Stores/Londis, Ticehurst	0.00%	0.00%	7.44%	0.00%	0.00%	0.00%	0.74%
Local Store, Sedlescombe	0.00%	0.00%	0.00%	2.53%	0.00%	0.00%	0.36%
Local Store, Staplecross	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	0.12%
Local Store, Westfield	0.00%	0.00%	0.00%	0.00%	0.00%	1.77%	0.15%
Local Stores/Spar, Northiam	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.34%
Local Store, Catsfield	0.00%	0.58%	0.00%	0.29%	0.00%	0.00%	0.22%
Local Store, Fairlight	0.00%	0.00%	0.00%	0.00%	0.00%	8.80%	0.74%
Local Stores Winchelsea/Beach	0.00%	0.00%	0.00%	0.00%	1.37%	2.33%	0.45%
Local Store, Etchingham	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.37%
Local Store, Hurst Green	0.00%	0.00%	2.04%	0.29%	0.00%	0.00%	0.24%
Local Stores/Village Centres In Rother	0.16%	0.58%	21.79%	9.96%	3.21%	12.90%	5.48%
Asda, Eastbourne, Crumbles	1.60%	3.00%	0.87%	0.23%	0.00%	1.00%	2.35%
Sainsbury, Hastings, St Leonards, John Macadam	0.70%	2.40%	4.50%	19.46%	11.00%	17.30%	10.43%
Morrison, Hastings, Queens Road	0.47%	0.65%	0.80%	3.80%	4.08%	17.60%	3.59%
Tesco, Hastings, St Leonards, Churchwood Drive	0.90%	1.96%	5.00%	10.00%	5.00%	11.00%	5.45%
Asda, Silverhill, Hastings	*0.95%*	*2.4%*	*4.6%*	*17.0%*	*7.5%*	*12.9%*	
Large Stores Outside Rother with Significant I	4.62%	10.41%	15.77%	50.49%	27.58%	59.81%	21.82%
Asda, Ashford, Kimberley Way	0.00%	0.00%	0.00%	0.00%	1.00%	0.49%	0.33%
Budgen, Hawkhurst, Rye Rd	0.00%	0.13%	5.89%	1.22%	3.20%	0.59%	1.44%
Budgen, Heathfield, Station Rd	0.00%	0.07%	0.88%	0.00%	0.24%	0.00%	0.16%
Co-op, Eastbourne, Albert Parade	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Co-op, Hailsham, The Quintons	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Heathfield, High St	0.00%	0.00%	14.60%	0.70%	0.00%	0.00%	1.56%
Co-op, Ore, Fairlight Rd	0.00%	0.00%	0.00%	0.00%	0.11%	2.50%	0.26%
Co-op, Polegate, The Centre	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Co-op, St Leonards, London Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, St Leonards, Silverhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Tenterden, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Hailsham, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, St Leonards, Battle Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Tenterden, Ashford Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Wadhurst, Sparrows Green Rd	0.00%	0.00%	1.92%	0.00%	0.00%	0.00%	0.19%
Iceland, Hastings, Castle St	0.00%	0.00%	0.23%	0.00%	0.00%	1.00%	0.11%
Iceland, Ashford, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Road	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Iceland, Tunbridge Wells, Calverley Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Jempson, Battle, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, St Leonards, Bohemia Rd	0.00%	0.07%	0.00%	0.23%	0.80%	1.08%	0.29%
Local Store, Hastings	0.00%	0.00%	0.00%	1.60%	1.37%	1.18%	0.61%
Marks & Spencer, Eastbourne	0.23%	0.79%	0.00%	0.00%	0.00%	0.00%	0.29%
Marks & Spencer, Priory Meadow Shopping Centr	0.64%	0.21%	0.47%	0.23%	1.12%	1.67%	0.60%
Sainsbury, Ashford, Simon Well Ave	0.00%	0.07%	0.00%	0.00%	0.66%	0.00%	0.14%
Sainsbury, Eastbourne, Arndale Centre	0.00%	0.47%	0.00%	0.00%	0.11%	0.00%	0.17%
Sainsbury, Eastbourne, Hampden Park	0.00%	1.20%	0.87%	0.23%	0.00%	0.00%	0.50%
Sainsbury, New Romney, Dymchurch Rd	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	0.02%
Sainsbury, Tunbridge Wells, Linden Park Rd	0.00%	0.00%	6.94%	0.47%	0.00%	0.00%	0.76%
Sainsbury, Tunbridge Wells, St Johns Road	0.00%	0.00%	2.36%	0.47%	0.11%	0.79%	0.39%
Somerfield, Eastbourne, Brassey Ave	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Spar, Hawkhurst, The Moor	0.00%	0.00%	0.41%	0.80%	0.00%	0.59%	0.20%
Spar, St Leonards, Kings Rd	0.23%	0.00%	0.00%	0.00%	0.00%	0.59%	0.09%
Tesco, Ashford, Hythe Rd	0.00%	0.00%	0.00%	0.00%	3.48%	0.00%	0.64%
Tesco, Eastbourne, Kingfisher Drive, Langney Sh	0.85%	1.50%	0.63%	0.23%	0.00%	0.00%	0.75%
Tesco, Eastbourne, Lottbridge Drove	0.16%	0.70%	0.00%	0.00%	0.00%	0.00%	0.25%
Tesco, St Leonards, Silverhill	0.00%	0.07%	0.00%	1.00%	0.23%	1.28%	0.41%
Tesco, Tenterden, Smallhythe Rd	0.00%	0.00%	0.87%	0.70%	11.07%	0.00%	2.22%
Tesco, Tunbridge Wells, Pembury Rd	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.28%
Tesco Express, Heathfield, Station Rd	0.23%	0.00%	0.23%	0.29%	0.00%	0.00%	0.10%
Tesco Express, St Leonards, Fernside Avenue	0.00%	0.21%	0.00%	0.00%	0.00%	0.00%	0.07%
Waitrose, Eastbourne, High St	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.16%
Waitrose, Hailsham, Vicarage Field	0.32%	1.21%	0.23%	0.00%	0.11%	0.00%	0.49%
Waitrose, Tenterden, High St	0.00%	0.00%	0.23%	0.23%	3.14%	0.79%	0.70%
Waitrose, Crowborough	0.00%	0.00%	0.72%	0.00%	0.00%	0.00%	0.07%
Other	1.30%	2.29%	13.00%	4.00%	5.04%	9.21%	4.75%
Other Stores/Locations Outside Rother	4.41%	9.64%	53.24%	12.42%	31.91%	21.78%	19.11%
* Internet/Home Delivery - Ocado/Waitrose	0.16%	0.00%	1.50%	0.76%	0.43%	0.00%	0.36%
* Internet/Home Delivery - Tesco	0.32%	0.14%	3.24%	0.52%	0.43%	0.00%	0.57%
* Internet/Home Delivery - Sainsburys	0.00%	0.07%	0.63%	0.00%	0.00%	0.00%	0.09%
Internet Home Delivery Channels	0.47%	0.21%	5.37%	1.28%	0.86%	0.00%	1.02%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	87.19%

Turnovers 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total	Beyond
Trade Draw	35.00%	53.00%	0.50%	1.00%	0.25%	0.25%	90.00%	10.00%
Sainsbury, Beeching Road South	**£13,241,195**	**£20,050,953**	**£189,160**	**£378,320**	**£94,580**	**£94,580**	***£37,831,986***	**£3,783,199**
Sainsbury, Bexhill, Buckhurst Place	£0	£0	£0	£0	£0	£0	£0	
Somerfield, Bexhill, Devonshire Rd	£2,306,834	£1,474,202	£0	£0	£68,758	£0	£3,849,793	
Aldi, Bexhill, London Rd	£1,252,281	£2,788,164	£0	£129,638	£0	£0	£4,170,083	
Co-op, Bexhill, Western Rd	£988,643	£1,538,297	£0	£0	£34,379	£0	£2,561,319	
Local Store, Bexhill	£1,647,738	£1,730,585	£79,046	£0	£0	£0	£3,457,369	
Bexhill Town Centre	£6,195,496	£7,531,248	£79,046	£129,638	£103,137	£0	£14,038,565	
Budgen/Jempson, Battle, Market Square	£0	£897,340	£0	£3,153,557	£0	£94,004	£4,144,901	
Co-op, Battle, High St	£51,893	£80,127	£0	£377,702	£0	£0	£509,722	
Local Store, Battle	£0	£0	£0	£385,828	£0	£0	£385,828	
Battle Town Centre	£51,893	£977,467	£0	£3,917,086	£0	£94,004	£5,040,451	
Jempson/Budgen, Rye, Station Approach	£0	£0	£0	£63,324	£4,538,027	£0	£4,601,351	
Local Store, Rye	£0	£0	£0	£0	£2,164,886	£185,350	£2,350,236	
Rye Town Centre	£0	£0	£0	£63,324	£6,702,913	£185,350	£6,951,587	
Lidl, Sidley, Ninfield Rd	£593,186	£2,499,733	£0	£192,962	£34,379	£0	£3,320,260	
Local Store, Sidley	£65,910	£640,957	£0	£0	£0	£0	£706,867	
Co-op, Sidley, Ninfield Rd	£395,457	£1,089,627	£0	£0	£0	£0	£1,485,085	
Sidley District Centre, Bexhill	£1,054,552	£4,230,318	£0	£192,962	£34,379	£0	£5,512,211	
Co-op, Little Common, Cooden Sea Rd	£0	£2,948,403	£0	£0	£457,241	£0	£3,405,644	
Local Store, Little Common	£131,819	£897,425	£0	£0	£0	£0	£1,029,244	
Little Common District Centre, Bexhill	£131,819	£3,845,828	£0	£0	£457,241	£0	£4,434,888	
Tesco, Bexhill, Collington Ave	£527,276	£1,986,968	£0	£129,638	£34,379	£128,187	£2,806,448	
Jempson, Peasmarsh, Main St	£0	£134,389	£251,807	£385,923	£4,813,059	£218,901	£5,804,080	
Tesco, Bexhill, Ravenside	£8,568,239	£11,537,231	£237,139	£822,667	£206,274	£119,641	£21,491,191	
Tesco Express, Battle, Battle Hill	£0	£448,712	£0	£1,069,467	£81,510	£100,904	£1,700,593	
Out Of Centre Stores In Rother	£9,095,515	£14,107,300	£488,947	£2,407,695	£5,135,222	£567,634	£31,802,312	
Local Store, Burwash	£0	£0	£1,699,683	£63,324	£0	£0	£1,763,007	
Local Store, Robertsbridge	£51,893	£0	£0	£1,583,237	£0	£0	£1,635,131	
Local Stores/Londis, Ticehurst	£0	£0	£1,469,574	£0	£0	£0	£1,469,574	
Local Store, Sedlescombe	£0	£0	£0	£693,061	£0	£0	£693,061	
Local Store, Staplecross	£0	£0	£0	£235,784	£0	£0	£235,784	
Local Store, Westfield	£0	£0	£0	£0	£0	£302,713	£302,713	
Local Stores/Spar, Northiam	£0	£0	£0	£0	£633,963	£0	£633,963	
Local Store, Catsfield	£0	£368,585	£0	£78,595	£0	£0	£447,180	
Local Store, Fairlight	£0	£0	£0	£0	£0	£1,503,957	£1,503,957	
Local Stores Winchelsea/Beach	£0	£0	£0	£0	£470,944	£398,813	£869,757	
Local Store, Etchingham	£0	£0	£732,467	£0	£0	£0	£732,467	
Local Store, Hurst Green	£0	£0	£403,722	£78,595	£0	£0	£482,316	
Local Stores/Village Centres In Rother	£51,893	£368,585	£4,305,446	£2,732,594	£1,104,907	£2,205,483	£10,768,908	
Asda, Eastbourne, Crumbles	£527,276	£1,922,872	£171,063	£63,324	£0	£170,916	£2,855,451	
Sainsbury, Hastings, St Leonards, John Macadam	£230,409	£1,538,297	£889,272	£5,336,366	£3,781,689	£2,956,847	£14,732,881	
Morrison, Hastings, Queens Road	£155,680	£417,601	£158,093	£1,042,045	£1,402,803	£3,008,122	£6,184,343	
Tesco, Hastings, St Leonards, Churchwood Drive	£296,593	£1,256,276	£988,080	£2,742,223	£1,718,950	£1,880,076	£8,882,198	
Asda, Silverhill, Hastings	£313,070	£1,538,297	£909,034	£4,661,779	£2,578,424	£2,206,526	£12,207,131	
Large Stores Outside Rother with Significant Influe	£1,523,029	£6,673,344	£3,115,541	£13,845,737	£9,481,866	£10,222,486	£44,862,004	
Asda, Ashford, Kimberley Way	£0	£0	£0	£0	£343,790	£84,446	£428,236	
Budgen, Hawkhurst, Rye Rd	£0	£80,127	£1,163,619	£334,880	£1,098,754	£100,904	£2,778,284	
Budgen, Heathfield, Station Rd	£0	£48,031	£173,612	£0	£81,510	£0	£303,152	
Co-op, Eastbourne, Albert Parade	£0	£80,127	£0	£0	£0	£0	£80,127	
Co-op, Hailsham, The Quintons	£0	£0	£0	£0	£0	£0	£0	
Co-op, Heathfield, High St	£0	£0	£2,885,987	£192,962	£0	£0	£3,078,949	
Co-op, Ore, Fairlight Rd	£0	£0	£0	£0	£39,364	£427,290	£466,654	
Co-op, Polegate, The Centre	£103,917	£0	£0	£0	£0	£0	£103,917	
Co-op, St Leonards, London Rd	£0	£0	£0	£0	£0	£0	£0	
Co-op, St Leonards, Silverhill	£0	£0	£0	£0	£0	£0	£0	
Co-op, Tenterden, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Hailsham, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, St Leonards, Battle Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Tenterden, Ashford Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Wadhurst, Sparrows Green Rd	£0	£0	£378,986	£0	£0	£0	£378,986	
Iceland, Hastings, Castle St	£0	£0	£46,434	£0	£0	£171,375	£217,809	
Iceland, Ashford, High St	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Centre	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Road	£51,893	£0	£0	£0	£0	£0	£51,893	
Iceland, Tunbridge Wells, Calverley Rd	£0	£0	£0	£0	£0	£0	£0	
Jempson, Battle, High St	£0	£0	£0	£0	£0	£0	£0	
Lidl, St Leonards, Bohemia Rd	£0	£48,031	£0	£63,324	£274,247	£185,350	£570,951	
Local Store, Hastings	£0	£0	£0	£438,756	£470,944	£201,809	£1,111,508	
Marks & Spencer, Eastbourne	£74,599	£504,672	£0	£0	£0	£0	£579,271	
Marks & Spencer, Priory Meadow Shopping Centr	£209,381	£136,086	£92,868	£63,324	£383,954	£286,255	£1,171,867	
Sainsbury, Ashford, Simon Well Ave	£0	£48,031	£0	£0	£226,499	£0	£274,529	
Sainsbury, Eastbourne, Arndale Centre	£0	£302,573	£0	£0	£39,364	£0	£341,936	
Sainsbury, Eastbourne, Hampden Park	£0	£769,901	£171,063	£63,324	£0	£0	£1,004,288	
Sainsbury, New Romney, Dymchurch Rd	£0	£0	£0	£0	£39,364	£0	£39,364	
Sainsbury, Tunbridge Wells, Linden Park Rd	£0	£0	£1,371,083	£129,638	£0	£0	£1,500,722	
Sainsbury, Tunbridge Wells, St Johns Road	£0	£0	£466,755	£129,638	£39,364	£134,455	£770,212	
Somerfield, Eastbourne, Brassey Ave	£0	£0	£0	£0	£0	£0	£0	
Spar, Hawkhurst, The Moor	£0	£0	£80,744	£220,513	£0	£100,904	£402,161	
Spar, St Leonards, Kings Rd	£74,599	£0	£0	£0	£0	£100,904	£175,504	
Tesco, Ashford, Hythe Rd	£0	£0	£0	£0	£1,197,011	£0	£1,197,011	
Tesco, Eastbourne, Kingfisher Drive, Langney Sho	£280,116	£961,436	£124,629	£63,324	£0	£0	£1,429,504	
Tesco, Eastbourne, Lottbridge Drove	£51,893	£446,664	£0	£0	£0	£0	£498,557	
Tesco, St Leonards, Silverhill	£0	£48,031	£0	£274,222	£78,727	£218,901	£619,881	
Tesco, Tenterden, Smallhythe Rd	£0	£0	£171,063	£192,962	£3,805,250	£0	£4,169,275	
Tesco, Tunbridge Wells, Pembury Rd	£0	£0	£544,950	£0	£0	£0	£544,950	
Tesco Express, Heathfield, Station Rd	£74,599	£0	£46,434	£78,595	£0	£0	£199,628	
Tesco Express, St Leonards, Fernside Avenue	£0	£134,389	£0	£0	£0	£0	£134,389	
Waitrose, Eastbourne, High St	£0	£323,237	£0	£0	£0	£0	£323,237	
Waitrose, Hailsham, Vicarage Field	£103,917	£778,044	£46,434	£0	£39,364	£0	£967,758	
Waitrose, Tenterden, High St	£0	£0	£46,434	£63,324	£1,078,920	£134,455	£1,323,133	
Waitrose, Crowborough	£0	£0	£141,882	£0	£0	£0	£141,882	
Other	£428,412	£1,466,531	£2,569,008	£1,096,889	£1,732,701	£1,574,776	£8,868,317	
Other Stores/Locations Outside Rother	£1,453,326	£6,175,910	£10,521,986	£3,405,671	£10,969,125	£3,721,825	£36,247,843	
* Internet/Home Delivery - Ocado/Waitrose	£51,893	£0	£295,692	£208,233	£147,771	£0	£703,589	
* Internet/Home Delivery - Tesco	£103,917	£88,056	£640,398	£141,918	£147,771	£0	£1,122,059	
* Internet/Home Delivery - Sainsburys	£0	£48,031	£124,629	£0	£0	£0	£172,659	
Internet Home Delivery Channels	£155,810	£136,086	£1,060,718	£350,151	£295,543	£0	£1,998,308	
	£19,713,334	£44,046,088	£19,571,684	£27,044,858	£34,284,332	£16,996,782		

TABLE J: Conveneince Market Shares 2015 with Waitrose at Beeching Road

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
Waitrose, Beeching Road South	***24.72%***	***18.16%***	***2.36%***	***2.55%***	***0.00%***	***0.00%***	
Sainsbury, Bexhill, Buckhurst Place	17.50%	14.50%	0.00%	0.20%	0.00%	0.00%	12.81%
Somerfield, Bexhill, Devonshire Rd	5.25%	2.20%	0.00%	0.00%	0.24%	0.00%	2.16%
Aldi, Bexhill, London Rd	3.50%	4.40%	0.00%	0.47%	0.00%	0.00%	2.20%
Co-op, Bexhill, Western Rd	2.50%	2.30%	0.00%	0.00%	0.11%	0.00%	1.34%
Local Store, Bexhill	4.00%	2.50%	0.35%	0.00%	0.00%	0.00%	1.97%
Bexhill Town Centre	32.75%	25.90%	0.35%	0.67%	0.35%	0.00%	20.48%
Budgen/Jempson, Battle, Market Square	0.00%	1.40%	0.00%	12.50%	0.00%	0.59%	2.59%
Co-op, Battle, High St	0.10%	0.13%	0.00%	1.38%	0.00%	0.00%	0.26%
Local Store, Battle	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.20%
Battle Town Centre	0.10%	1.53%	0.00%	15.28%	0.00%	0.59%	3.05%
Jempson/Budgen, Rye, Station Approach	0.00%	0.00%	0.00%	0.23%	13.20%	0.00%	2.59%
Local Store, Rye	0.00%	0.00%	0.00%	0.00%	6.30%	1.08%	1.25%
Rye Town Centre	0.00%	0.00%	0.00%	0.23%	19.50%	1.08%	3.84%
Lidl, Sidley, Ninfield Rd	1.95%	3.98%	0.00%	0.70%	0.11%	0.00%	1.73%
Local Store, Sidley	0.23%	1.00%	0.00%	0.00%	0.00%	0.00%	0.38%
Co-op, Sidley, Ninfield Rd	1.25%	1.77%	0.00%	0.00%	0.00%	0.00%	0.78%
Sidley District Centre, Bexhill	3.42%	6.76%	0.00%	0.70%	0.11%	0.00%	2.88%
Co-op, Little Common, Cooden Sea Rd	0.00%	4.70%	0.00%	0.00%	1.36%	0.00%	1.75%
Local Store, Little Common	0.48%	1.40%	0.00%	0.00%	0.00%	0.00%	0.53%
Little Common District Centre, Bexhill	0.48%	6.10%	0.00%	0.00%	1.36%	0.00%	2.28%
Tesco, Bexhill, Collington Ave	1.50%	3.00%	0.00%	0.47%	0.11%	0.79%	1.48%
Jempson, Peasmarsh, Main St	0.00%	0.21%	1.20%	1.41%	14.00%	1.28%	3.55%
Tesco, Bexhill, Ravenside	28.75%	19.00%	1.20%	3.10%	0.67%	0.79%	14.14%
Tesco Express, Battle, Battle Hill	0.00%	0.70%	0.00%	3.90%	0.24%	0.59%	0.88%
Out Of Centre Stores In Rother	30.25%	22.91%	2.40%	8.88%	15.02%	3.44%	20.05%
Local Store, Burwash	0.00%	0.00%	8.55%	0.23%	0.00%	0.00%	0.89%
Local Store, Robertsbridge	0.16%	0.00%	0.00%	5.77%	0.00%	0.00%	0.84%
Local Stores/Londis, Ticehurst	0.00%	0.00%	7.40%	0.00%	0.00%	0.00%	0.74%
Local Store, Sedlescombe	0.00%	0.00%	0.00%	2.53%	0.00%	0.00%	0.36%
Local Store, Staplecross	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	0.12%
Local Store, Westfield	0.00%	0.00%	0.00%	0.00%	0.00%	1.77%	0.15%
Local Stores/Spar, Northiam	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.34%
Local Store, Catsfield	0.00%	0.58%	0.00%	0.29%	0.00%	0.00%	0.22%
Local Store, Fairlight	0.00%	0.00%	0.00%	0.00%	0.00%	8.80%	0.74%
Local Stores Winchelsea/Beach	0.00%	0.00%	0.00%	0.00%	1.37%	2.33%	0.45%
Local Store, Etchingham	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.37%
Local Store, Hurst Green	0.00%	0.00%	2.04%	0.29%	0.00%	0.00%	0.24%
Local Stores/Village Centres In Rother	0.16%	0.58%	21.70%	9.96%	3.21%	12.90%	5.48%
Asda, Eastbourne, Crumbles	1.00%	3.00%	0.87%	0.22%	0.00%	1.00%	2.35%
Sainsbury, Hastings, St Leonards, John Macadam Way	0.60%	2.00%	4.50%	19.00%	11.00%	17.60%	10.43%
Morrison, Hastings, Queens Road	0.40%	0.65%	0.80%	3.80%	4.08%	17.60%	3.59%
Tesco, Hastings, St Leonards, Churchwood Drive	0.80%	1.00%	4.50%	9.00%	5.00%	11.00%	5.45%
Asda, Silverhill, Hastings	*0.80%*	*1.5%*	*4.0%*	*16.0%*	*7.5%*	*13.0%*	
Large Stores Outside Rother with Significant Influence	3.60%	8.15%	14.67%	48.02%	27.58%	60.20%	21.82%
Asda, Ashford, Kimberley Way	0.00%	0.00%	0.00%	0.00%	1.00%	0.49%	0.33%
Budgen, Hawkhurst, Rye Rd	0.00%	0.13%	5.89%	1.22%	3.20%	0.59%	1.44%
Budgen, Heathfield, Station Rd	0.00%	0.07%	0.88%	0.00%	0.24%	0.00%	0.16%
Co-op, Eastbourne, Albert Parade	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Co-op, Hailsham, The Quintons	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Heathfield, High St	0.00%	0.00%	14.60%	0.70%	0.00%	0.00%	1.56%
Co-op, Ore, Fairlight Rd	0.00%	0.00%	0.00%	0.00%	0.11%	2.50%	0.26%
Co-op, Polegate, The Centre	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Co-op, St Leonards, London Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, St Leonards, Silverhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Tenterden, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Hailsham, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, St Leonards, Battle Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Tenterden, Ashford Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Wadhurst, Sparrows Green Rd	0.00%	0.00%	1.92%	0.00%	0.00%	0.00%	0.19%
Iceland, Hastings, Castle St	0.00%	0.00%	0.23%	0.00%	0.00%	1.00%	0.11%
Iceland, Ashford, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Road	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Iceland, Tunbridge Wells, Calverley Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Jempson, Battle, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, St Leonards, Bohemia Rd	0.00%	0.07%	0.00%	0.23%	0.80%	1.08%	0.29%
Local Store, Hastings	0.00%	0.00%	0.00%	1.60%	1.37%	1.18%	0.61%
Marks & Spencer, Eastbourne	0.23%	0.79%	0.00%	0.00%	0.00%	0.00%	0.29%
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	0.64%	0.21%	0.47%	0.23%	1.12%	1.67%	0.60%
Sainsbury, Ashford, Simon Well Ave	0.00%	0.07%	0.00%	0.00%	0.66%	0.00%	0.14%
Sainsbury, Eastbourne, Arndale Centre	0.00%	0.47%	0.00%	0.00%	0.11%	0.00%	0.17%
Sainsbury, Eastbourne, Hampden Park	0.00%	1.20%	0.87%	0.23%	0.00%	0.00%	0.50%
Sainsbury, New Romney, Dymchurch Rd	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	0.02%
Sainsbury, Tunbridge Wells, Linden Park Rd	0.00%	0.00%	6.94%	0.47%	0.00%	0.00%	0.76%
Sainsbury, Tunbridge Wells, St Johns Road	0.00%	0.00%	2.36%	0.47%	0.11%	0.79%	0.39%
Somerfield, Eastbourne, Brassey Ave	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Spar, Hawkhurst, The Moor	0.00%	0.00%	0.41%	0.80%	0.00%	0.59%	0.20%
Spar, St Leonards, Kings Rd	0.23%	0.00%	0.00%	0.00%	0.00%	0.59%	0.09%
Tesco, Ashford, Hythe Rd	0.00%	0.00%	0.00%	0.00%	3.48%	0.00%	0.64%
Tesco, Eastbourne, Kingfisher Drive, Langney Shopping Centre	0.86%	1.58%	0.63%	0.23%	0.00%	0.00%	0.75%
Tesco, Eastbourne, Lottbridge Drove	0.16%	0.70%	0.00%	0.00%	0.00%	0.00%	0.25%
Tesco, St Leonards, Silverhill	0.00%	0.07%	0.00%	1.00%	0.23%	1.28%	0.41%
Tesco, Tenterden, Smallhythe Rd	0.00%	0.00%	0.87%	0.70%	11.07%	0.00%	2.22%
Tesco, Tunbridge Wells, Pembury Rd	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.28%
Tesco Express, Heathfield, Station Rd	0.23%	0.00%	0.23%	0.29%	0.00%	0.00%	0.10%
Tesco Express, St Leonards, Fernside Avenue	0.00%	0.21%	0.00%	0.00%	0.00%	0.00%	0.07%
Waitrose, Eastbourne, High St	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.16%
Waitrose, Hailsham, Vicarage Field	0.10%	1.21%	0.20%	0.00%	0.11%	0.00%	0.49%
Waitrose, Tenterden, High St	0.00%	0.00%	0.20%	0.23%	3.14%	0.79%	0.70%
Waitrose, Crowborough	0.00%	0.00%	0.70%	0.00%	0.00%	0.00%	0.07%
Other	1.14%	2.29%	13.00%	4.00%	5.14%	9.21%	4.75%
Other Stores/Locations Outside Rother	4.04%	9.72%	53.16%	12.42%	32.01%	21.78%	19.11%
* Internet/Home Delivery - Ocado/Waitrose	0.16%	0.00%	1.50%	0.76%	0.43%	0.00%	0.36%
* Internet/Home Delivery - Tesco	0.32%	0.14%	3.24%	0.52%	0.43%	0.00%	0.57%
* Internet/Home Delivery - Sainsburys	0.00%	0.07%	0.63%	0.00%	0.00%	0.00%	0.09%
Internet Home Delivery Channels	0.47%	0.21%	5.37%	1.28%	0.86%	0.00%	1.02%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Turnovers 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total	Beyond
Trade Draw	35%	50%	2%	3%	0%	0%	90%	10%
Waitrose, Beeching Road South	**£8,147,391**	**£11,639,130**	**£465,565**	**£698,348**	**£0**	**£0**	***£23,278,260***	**£2,327,826**
Sainsbury, Bexhill, Buckhurst Place	£5,767,084	£9,293,880	£0	£54,844	£0	£0	£15,115,809	
Somerfield, Bexhill, Devonshire Rd	£1,730,125	£1,410,106	£0	£0	£81,510	£0	£3,221,741	
Aldi, Bexhill, London Rd	£1,153,417	£2,820,212	£0	£129,638	£0	£0	£4,103,267	
Co-op, Bexhill, Western Rd	£823,869	£1,474,202	£0	£0	£39,364	£0	£2,337,435	
Local Store, Bexhill	£1,318,191	£1,602,393	£69,166	£0	£0	£0	£2,989,749	
Bexhill Town Centre	£10,792,686	£16,600,793	£69,166	£184,483	£120,873	£0	£27,768,000	
Budgen/Jempson, Battle, Market Square	£0	£897,340	£0	£3,427,779	£0	£100,904	£4,426,024	
Co-op, Battle, High St	£32,955	£80,127	£0	£377,702	£0	£0	£490,784	
Local Store, Battle	£0	£0	£0	£385,828	£0	£0	£385,828	
Battle Town Centre	£32,955	£977,467	£0	£4,191,308	£0	£100,904	£5,302,635	
Jempson/Budgen, Rye, Station Approach	£0	£0	£0	£63,324	£4,538,027	£0	£4,601,351	
Local Store, Rye	£0	£0	£0	£0	£2,164,886	£185,350	£2,350,236	
Rye Town Centre	£0	£0	£0	£63,324	£6,702,913	£185,350	£6,951,587	
Lidl, Sidley, Ninfield Rd	£643,039	£2,553,953	£0	£192,962	£39,364	£0	£3,429,318	
Local Store, Sidley	£74,599	£640,957	£0	£0	£0	£0	£715,556	
Co-op, Sidley, Ninfield Rd	£410,602	£1,135,804	£0	£0	£0	£0	£1,546,406	
Sidley District Centre, Bexhill	£1,128,240	£4,330,715	£0	£192,962	£39,364	£0	£5,691,280	
Co-op, Little Common, Cooden Sea Rd	£0	£3,010,266	£0	£0	£468,162	£0	£3,478,427	
Local Store, Little Common	£157,487	£897,425	£0	£0	£0	£0	£1,054,912	
Little Common District Centre, Bexhill	£157,487	£3,907,690	£0	£0	£468,162	£0	£4,533,339	
Tesco, Bexhill, Collington Ave	£494,321	£1,922,872	£0	£129,638	£39,364	£134,455	£2,720,650	
Jempson, Peasmarsh, Main St	£0	£134,389	£237,139	£385,923	£4,813,059	£218,901	£5,789,412	
Tesco, Bexhill, Ravenside	£9,474,495	£12,178,188	£237,139	£850,441	£229,281	£134,455	£23,103,999	
Tesco Express, Battle, Battle Hill	£0	£448,712	£0	£1,069,467	£81,510	£100,904	£1,700,593	
Out Of Centre Stores In Rother	£9,968,816	£14,684,162	£474,278	£2,435,469	£5,163,213	£588,716	£33,314,655	
Local Store, Burwash	£0	£0	£1,689,617	£63,324	£0	£0	£1,752,940	
Local Store, Robertsbridge	£51,893	£0	£0	£1,583,237	£0	£0	£1,635,131	
Local Stores/Londis, Ticehurst	£0	£0	£1,462,358	£0	£0	£0	£1,462,358	
Local Store, Sedlescombe	£0	£0	£0	£693,061	£0	£0	£693,061	
Local Store, Staplecross	£0	£0	£0	£235,784	£0	£0	£235,784	
Local Store, Westfield	£0	£0	£0	£0	£0	£302,713	£302,713	
Local Stores/Spar, Northiam	£0	£0	£0	£0	£633,963	£0	£633,963	
Local Store, Catsfield	£0	£368,585	£0	£78,595	£0	£0	£447,180	
Local Store, Fairlight	£0	£0	£0	£0	£0	£1,503,957	£1,503,957	
Local Stores Winchelsea/Beach	£0	£0	£0	£0	£470,944	£398,813	£869,757	
Local Store, Etchingham	£0	£0	£732,467	£0	£0	£0	£732,467	
Local Store, Hurst Green	£0	£0	£403,722	£78,595	£0	£0	£482,316	
Local Stores/Village Centres In Rother	£51,893	£368,585	£4,288,164	£2,732,594	£1,104,907	£2,205,483	£10,751,626	
Asda, Eastbourne, Crumbles	£329,548	£1,922,872	£171,063	£60,329	£0	£170,916	£2,654,727	
Sainsbury, Hastings, St Leonards, John Macadam Way	£197,729	£1,281,915	£889,272	£5,210,224	£3,781,689	£3,008,122	£14,368,950	
Morrison, Hastings, Queens Road	£131,819	£417,601	£158,093	£1,042,045	£1,402,803	£3,008,122	£6,160,482	
Tesco, Hastings, St Leonards, Churchwood Drive	£263,638	£640,957	£889,272	£2,468,001	£1,718,950	£1,880,076	£7,860,894	
Asda, Silverhill, Hastings	£263,638	£961,436	£790,464	£4,387,557	£2,578,424	£2,221,908	£11,203,428	
Large Stores Outside Rother with Significant Influence	£1,186,372	£5,224,781	£2,898,164	£13,168,156	£9,481,866	£10,289,143	£42,248,481	
Asda, Ashford, Kimberley Way	£0	£0	£0	£0	£343,790	£84,446	£428,236	
Budgen, Hawkhurst, Rye Rd	£0	£80,127	£1,163,619	£334,880	£1,098,754	£100,904	£2,778,284	
Budgen, Heathfield, Station Rd	£0	£48,031	£173,612	£0	£81,510	£0	£303,152	
Co-op, Eastbourne, Albert Parade	£0	£80,127	£0	£0	£0	£0	£80,127	
Co-op, Hailsham, The Quintons	£0	£0	£0	£0	£0	£0	£0	
Co-op, Heathfield, High St	£0	£0	£2,885,987	£192,962	£0	£0	£3,078,949	
Co-op, Ore, Fairlight Rd	£0	£0	£0	£0	£39,364	£427,290	£466,654	
Co-op, Polegate, The Centre	£103,917	£0	£0	£0	£0	£0	£103,917	
Co-op, St Leonards, London Rd	£0	£0	£0	£0	£0	£0	£0	
Co-op, St Leonards, Silverhill	£0	£0	£0	£0	£0	£0	£0	
Co-op, Tenterden, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Hailsham, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, St Leonards, Battle Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Tenterden, Ashford Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Wadhurst, Sparrows Green Rd	£0	£0	£378,986	£0	£0	£0	£378,986	
Iceland, Hastings, Castle St	£0	£0	£46,434	£0	£0	£171,375	£217,809	
Iceland, Ashford, High St	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Centre	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Road	£51,893	£0	£0	£0	£0	£0	£51,893	
Iceland, Tunbridge Wells, Calverley Rd	£0	£0	£0	£0	£0	£0	£0	
Jempson, Battle, High St	£0	£0	£0	£0	£0	£0	£0	
Lidl, St Leonards, Bohemia Rd	£0	£48,031	£0	£63,324	£274,247	£185,350	£570,951	
Local Store, Hastings	£0	£0	£0	£438,756	£470,944	£201,809	£1,111,508	
Marks & Spencer, Eastbourne	£74,599	£504,672	£0	£0	£0	£0	£579,271	
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£209,381	£136,086	£92,868	£63,324	£383,954	£286,255	£1,171,867	
Sainsbury, Ashford, Simon Well Ave	£0	£48,031	£0	£0	£226,499	£0	£274,529	
Sainsbury, Eastbourne, Arndale Centre	£0	£302,573	£0	£0	£39,364	£0	£341,936	
Sainsbury, Eastbourne, Hampden Park	£0	£769,901	£171,063	£63,324	£0	£0	£1,004,288	
Sainsbury, New Romney, Dymchurch Rd	£0	£0	£0	£0	£39,364	£0	£39,364	
Sainsbury, Tunbridge Wells, Linden Park Rd	£0	£0	£1,371,083	£129,638	£0	£0	£1,500,722	
Sainsbury, Tunbridge Wells, St Johns Road	£0	£0	£466,755	£129,638	£39,364	£134,455	£770,212	
Somerfield, Eastbourne, Brassey Ave	£0	£0	£0	£0	£0	£0	£0	
Spar, Hawkhurst, The Moor	£0	£0	£80,744	£220,513	£0	£100,904	£402,161	
Spar, St Leonards, Kings Rd	£74,599	£0	£0	£0	£0	£100,904	£175,504	
Tesco, Ashford, Hythe Rd	£0	£0	£0	£0	£1,197,011	£0	£1,197,011	
Tesco, Eastbourne, Kingfisher Drive, Langney Shopping Centre	£282,303	£1,013,225	£124,629	£63,324	£0	£0	£1,483,480	
Tesco, Eastbourne, Lottbridge Drove	£51,893	£446,664	£0	£0	£0	£0	£498,557	
Tesco, St Leonards, Silverhill	£0	£48,031	£0	£274,222	£78,727	£218,901	£619,881	
Tesco, Tenterden, Smallhythe Rd	£0	£0	£171,063	£192,962	£3,805,250	£0	£4,169,275	
Tesco, Tunbridge Wells, Pembury Rd	£0	£0	£544,950	£0	£0	£0	£544,950	
Tesco Express, Heathfield, Station Rd	£74,599	£0	£46,434	£78,595	£0	£0	£199,628	
Tesco Express, St Leonards, Fernside Avenue	£0	£134,389	£0	£0	£0	£0	£134,389	
Waitrose, Eastbourne, High St	£0	£323,237	£0	£0	£0	£0	£323,237	
Waitrose, Hailsham, Vicarage Field	£32,955	£778,044	£39,523	£0	£39,364	£0	£889,886	
Waitrose, Tenterden, High St	£0	£0	£39,523	£63,324	£1,078,920	£134,455	£1,316,222	
Waitrose, Crowborough	£0	£0	£138,331	£0	£0	£0	£138,331	
Other	£375,684	£1,466,531	£2,569,008	£1,096,889	£1,767,080	£1,574,776	£8,849,969	
Other Stores/Locations Outside Rother	£1,331,823	£6,227,700	£10,504,613	£3,405,671	£11,003,504	£3,721,825	£36,195,137	
* Internet/Home Delivery - Ocado/Waitrose	£51,893	£0	£295,692	£208,233	£147,771	£0	£703,589	
* Internet/Home Delivery - Tesco	£103,917	£88,056	£640,398	£141,918	£147,771	£0	£1,122,059	
* Internet/Home Delivery - Sainsburys	£0	£48,031	£124,629	£0	£0	£0	£172,659	
Internet Home Delivery Channels	£155,810	£136,086	£1,060,718	£350,151	£295,543	£0	£1,998,308	
	£24,806,082	£52,457,980	£19,295,103	£26,724,117	£34,380,345	£17,091,422		

TABLE K: Conveneince Market Shares 2015 with Morrisons at Beeching Road

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total
Morrisons, Beeching Road South	***27.97%***	***20.54%***	***2.66%***	***2.88%***	***0.00%***	***0.00%***	
Sainsbury, Bexhill, Buckhurst Place	17.00%	14.00%	0.00%	0.20%	0.00%	0.00%	12.81%
Somerfield, Bexhill, Devonshire Rd	5.00%	2.20%	0.00%	0.00%	0.24%	0.00%	2.16%
Aldi, Bexhill, London Rd	3.25%	4.20%	0.00%	0.44%	0.00%	0.00%	2.20%
Co-op, Bexhill, Western Rd	2.50%	2.30%	0.00%	0.00%	0.11%	0.00%	1.34%
Local Store, Bexhill	3.76%	2.50%	0.35%	0.00%	0.00%	0.00%	1.97%
Bexhill Town Centre	31.51%	25.20%	0.35%	0.64%	0.35%	0.00%	20.48%
Budgen/Jempson, Battle, Market Square	0.00%	1.40%	0.00%	12.30%	0.00%	0.59%	2.59%
Co-op, Battle, High St	0.10%	0.13%	0.00%	1.38%	0.00%	0.00%	0.26%
Local Store, Battle	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.20%
Battle Town Centre	0.10%	1.53%	0.00%	15.08%	0.00%	0.59%	3.05%
Jempson/Budgen, Rye, Station Approach	0.00%	0.00%	0.00%	0.23%	13.20%	0.00%	2.59%
Local Store, Rye	0.00%	0.00%	0.00%	0.00%	6.30%	1.08%	1.25%
Rye Town Centre	0.00%	0.00%	0.00%	0.23%	19.50%	1.08%	3.84%
Lidl, Sidley, Ninfield Rd	1.95%	3.80%	0.00%	0.70%	0.11%	0.00%	1.73%
Local Store, Sidley	0.23%	1.00%	0.00%	0.00%	0.00%	0.00%	0.38%
Co-op, Sidley, Ninfield Rd	1.25%	1.77%	0.00%	0.00%	0.00%	0.00%	0.78%
Sidley District Centre, Bexhill	3.42%	6.57%	0.00%	0.70%	0.11%	0.00%	2.88%
Co-op, Little Common, Cooden Sea Rd	0.00%	4.70%	0.00%	0.00%	1.36%	0.00%	1.75%
Local Store, Little Common	0.48%	1.40%	0.00%	0.00%	0.00%	0.00%	0.53%
Little Common District Centre, Bexhill	0.48%	6.10%	0.00%	0.00%	1.36%	0.00%	2.28%
Tesco, Bexhill, Collington Ave	1.50%	3.00%	0.00%	0.47%	0.11%	0.79%	1.48%
Jempson, Peasmarsh, Main St	0.00%	0.21%	1.20%	1.41%	14.00%	1.28%	3.55%
Tesco, Bexhill, Ravenside	26.75%	17.50%	1.20%	3.00%	0.67%	0.79%	14.14%
Tesco Express, Battle, Battle Hill	0.00%	0.70%	0.00%	3.90%	0.24%	0.59%	0.88%
Out Of Centre Stores In Rother	28.25%	21.41%	2.40%	8.78%	15.02%	3.44%	20.05%
Local Store, Burwash	0.00%	0.00%	8.55%	0.23%	0.00%	0.00%	0.89%
Local Store, Robertsbridge	0.16%	0.00%	0.00%	5.77%	0.00%	0.00%	0.84%
Local Stores/Londis, Ticehurst	0.00%	0.00%	7.40%	0.00%	0.00%	0.00%	0.74%
Local Store, Sedlescombe	0.00%	0.00%	0.00%	2.53%	0.00%	0.00%	0.36%
Local Store, Staplecross	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	0.12%
Local Store, Westfield	0.00%	0.00%	0.00%	0.00%	0.00%	1.77%	0.15%
Local Stores/Spar, Northiam	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.34%
Local Store, Catsfield	0.00%	0.58%	0.00%	0.29%	0.00%	0.00%	0.22%
Local Store, Fairlight	0.00%	0.00%	0.00%	0.00%	0.00%	8.80%	0.74%
Local Stores Winchelsea/Beach	0.00%	0.00%	0.00%	0.00%	1.37%	2.33%	0.45%
Local Store, Etchingham	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.37%
Local Store, Hurst Green	0.00%	0.00%	2.04%	0.29%	0.00%	0.00%	0.24%
Local Stores/Village Centres In Rother	0.16%	0.58%	21.70%	9.96%	3.21%	12.90%	5.48%
Asda, Eastbourne, Crumbles	1.00%	3.00%	0.87%	0.22%	0.00%	1.00%	2.35%
Sainsbury, Hastings, St Leonards, John Macadam	0.60%	2.00%	4.40%	19.00%	11.00%	17.60%	10.43%
Morrison, Hastings, Queens Road	0.40%	0.65%	0.80%	3.80%	4.08%	17.60%	3.59%
Tesco, Hastings, St Leonards, Churchwood Drive	0.80%	1.00%	4.40%	9.00%	5.00%	11.00%	5.45%
Asda, Silverhill, Hastings	*0.80%*	*1.5%*	*3.9%*	*16.0%*	*7.5%*	*13.0%*	
Large Stores Outside Rother with Significant I	3.60%	8.15%	14.37%	48.02%	27.58%	60.20%	21.82%
Asda, Ashford, Kimberley Way	0.00%	0.00%	0.00%	0.00%	1.00%	0.49%	0.33%
Budgen, Hawkhurst, Rye Rd	0.00%	0.13%	5.89%	1.22%	3.20%	0.59%	1.44%
Budgen, Heathfield, Station Rd	0.00%	0.07%	0.88%	0.00%	0.24%	0.00%	0.16%
Co-op, Eastbourne, Albert Parade	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Co-op, Hailsham, The Quintons	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Heathfield, High St	0.00%	0.00%	14.60%	0.70%	0.00%	0.00%	1.58%
Co-op, Ore, Fairlight Rd	0.00%	0.00%	0.00%	0.00%	0.11%	2.50%	0.26%
Co-op, Polegate, The Centre	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Co-op, St Leonards, London Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, St Leonards, Silverhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Tenterden, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Hailsham, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, St Leonards, Battle Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Tenterden, Ashford Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Costcutter, Wadhurst, Sparrows Green Rd	0.00%	0.00%	1.92%	0.00%	0.00%	0.00%	0.19%
Iceland, Hastings, Castle St	0.00%	0.00%	0.23%	0.00%	0.00%	1.00%	0.11%
Iceland, Ashford, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Iceland, Eastbourne, Langney Road	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Iceland, Tunbridge Wells, Calverley Rd	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Jempson, Battle, High St	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lidl, St Leonards, Bohemia Rd	0.00%	0.07%	0.00%	0.23%	0.80%	1.08%	0.29%
Local Store, Hastings	0.00%	0.00%	0.00%	1.60%	1.37%	1.18%	0.61%
Marks & Spencer, Eastbourne	0.23%	0.79%	0.00%	0.00%	0.00%	0.00%	0.29%
Marks & Spencer, Priory Meadow Shopping Centr	0.64%	0.21%	0.47%	0.23%	1.12%	1.67%	0.60%
Sainsbury, Ashford, Simon Well Ave	0.00%	0.07%	0.00%	0.00%	0.66%	0.00%	0.14%
Sainsbury, Eastbourne, Arndale Centre	0.00%	0.47%	0.00%	0.00%	0.11%	0.00%	0.17%
Sainsbury, Eastbourne, Hampden Park	0.00%	1.20%	0.87%	0.23%	0.00%	0.00%	0.50%
Sainsbury, New Romney, Dymchurch Rd	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	0.02%
Sainsbury, Tunbridge Wells, Linden Park Rd	0.00%	0.00%	6.94%	0.47%	0.00%	0.00%	0.76%
Sainsbury, Tunbridge Wells, St Johns Road	0.00%	0.00%	2.36%	0.47%	0.11%	0.79%	0.39%
Somerfield, Eastbourne, Brassey Ave	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Spar, Hawkhurst, The Moor	0.00%	0.00%	0.41%	0.80%	0.00%	0.59%	0.20%
Spar, St Leonards, Kings Rd	0.23%	0.00%	0.00%	0.00%	0.00%	0.59%	0.09%
Tesco, Ashford, Hythe Rd	0.00%	0.00%	0.00%	0.00%	3.48%	0.00%	0.64%
Tesco, Eastbourne, Kingfisher Drive, Langney Sh	0.86%	1.58%	0.63%	0.23%	0.00%	0.00%	0.75%
Tesco, Eastbourne, Lottbridge Drove	0.16%	0.70%	0.00%	0.00%	0.00%	0.00%	0.25%
Tesco, St Leonards, Silverhill	0.00%	0.07%	0.00%	1.00%	0.23%	1.28%	0.41%
Tesco, Tenterden, Smallhythe Rd	0.00%	0.00%	0.87%	0.70%	11.07%	0.00%	2.22%
Tesco, Tunbridge Wells, Pembury Rd	0.00%	0.00%	2.76%	0.00%	0.00%	0.00%	0.28%
Tesco Express, Heathfield, Station Rd	0.23%	0.00%	0.23%	0.29%	0.00%	0.00%	0.10%
Tesco Express, St Leonards, Fernside Avenue	0.00%	0.21%	0.00%	0.00%	0.00%	0.00%	0.07%
Waitrose, Eastbourne, High St	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.16%
Waitrose, Hailsham, Vicarage Field	0.10%	1.21%	0.20%	0.00%	0.11%	0.00%	0.49%
Waitrose, Tenterden, High St	0.00%	0.00%	0.20%	0.23%	3.14%	0.79%	0.70%
Waitrose, Crowborough	0.00%	0.00%	0.70%	0.00%	0.00%	0.00%	0.07%
Other	1.14%	2.29%	13.00%	4.00%	5.14%	9.21%	4.75%
Other Stores/Locations Outside Rother	4.04%	9.72%	53.16%	12.42%	32.01%	21.78%	19.11%
* Internet/Home Delivery - Ocado/Waitrose	0.16%	0.00%	1.50%	0.76%	0.43%	0.00%	0.36%
* Internet/Home Delivery - Tesco	0.32%	0.14%	3.24%	0.52%	0.43%	0.00%	0.57%
* Internet/Home Delivery - Sainsburys	0.00%	0.07%	0.63%	0.00%	0.00%	0.00%	0.09%
Internet Home Delivery Channels	0.47%	0.21%	5.37%	1.28%	0.86%	0.00%	1.02%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Turnovers 2015 (inc adjustments for Asda, Silverhill)

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	Study Area Total	Beyond
Trade Draw	35%	50%	2%	3%	0%	0%	90%	10%
Morrisons, Beeching Road South	**£9,215,980**	**£13,165,686**	**£526,627**	**£789,941**	**£0**	**£0**	***£26,331,371***	**£2,633,137**
Sainsbury, Bexhill, Buckhurst Place	£5,602,310	£8,973,402	£0	£54,844	£0	£0	£14,630,556	
Somerfield, Bexhill, Devonshire Rd	£1,647,738	£1,410,106	£0	£0	£81,510	£0	£3,139,354	
Aldi, Bexhill, London Rd	£1,071,030	£2,692,021	£0	£120,658	£0	£0	£3,883,708	
Co-op, Bexhill, Western Rd	£823,869	£1,474,202	£0	£0	£39,364	£0	£2,337,435	
Local Store, Bexhill	£1,239,099	£1,602,393	£69,166	£0	£0	£0	£2,910,658	
Bexhill Town Centre	£10,384,046	£16,152,123	£69,166	£175,502	£120,873	£0	£26,901,711	
Budgen/Jempson, Battle, Market Square	£0	£897,340	£0	£3,372,935	£0	£100,904	£4,371,179	
Co-op, Battle, High St	£32,955	£80,127	£0	£377,702	£0	£0	£490,784	
Local Store, Battle	£0	£0	£0	£385,828	£0	£0	£385,828	
Battle Town Centre	£32,955	£977,467	£0	£4,136,464	£0	£100,904	£5,247,791	
Jempson/Budgen, Rye, Station Approach	£0	£0	£0	£63,324	£4,538,027	£0	£4,601,351	
Local Store, Rye	£0	£0	£0	£0	£2,164,886	£185,350	£2,350,236	
Rye Town Centre	£0	£0	£0	£63,324	£6,702,913	£185,350	£6,951,587	
Lidl, Sidley, Ninfield Rd	£643,039	£2,435,638	£0	£192,962	£39,364	£0	£3,311,002	
Local Store, Sidley	£74,599	£640,957	£0	£0	£0	£0	£715,556	
Co-op, Sidley, Ninfield Rd	£410,602	£1,135,804	£0	£0	£0	£0	£1,546,406	
Sidley District Centre, Bexhill	£1,128,240	£4,212,399	£0	£192,962	£39,364	£0	£5,572,964	
Co-op, Little Common, Cooden Sea Rd	£0	£3,010,266	£0	£0	£468,162	£0	£3,478,427	
Local Store, Little Common	£157,487	£897,425	£0	£0	£0	£0	£1,054,912	
Little Common District Centre, Bexhill	£157,487	£3,907,690	£0	£0	£468,162	£0	£4,533,339	
Tesco, Bexhill, Collington Ave	£494,321	£1,922,872	£0	£129,638	£39,364	£134,455	£2,720,650	
Jempson, Peasmarsh, Main St	£0	£134,389	£237,139	£385,923	£4,813,059	£218,901	£5,789,412	
Tesco, Bexhill, Ravenside	£8,815,400	£11,216,752	£237,139	£822,667	£229,281	£134,455	£21,455,694	
Tesco Express, Battle, Battle Hill	£0	£448,712	£0	£1,069,467	£81,510	£100,904	£1,700,593	
Out Of Centre Stores In Rother	£9,309,721	£13,722,726	£474,278	£2,407,695	£5,163,213	£588,716	£31,666,350	
Local Store, Burwash	£0	£0	£1,689,617	£63,324	£0	£0	£1,752,940	
Local Store, Robertsbridge	£51,893	£0	£0	£1,583,237	£0	£0	£1,635,131	
Local Stores/Londis, Ticehurst	£0	£0	£1,462,358	£0	£0	£0	£1,462,358	
Local Store, Sedlescombe	£0	£0	£0	£693,061	£0	£0	£693,061	
Local Store, Staplecross	£0	£0	£0	£235,784	£0	£0	£235,784	
Local Store, Westfield	£0	£0	£0	£0	£0	£302,713	£302,713	
Local Stores/Spar, Northiam	£0	£0	£0	£0	£633,963	£0	£633,963	
Local Store, Catsfield	£0	£368,585	£0	£78,595	£0	£0	£447,180	
Local Store, Fairlight	£0	£0	£0	£0	£0	£1,503,957	£1,503,957	
Local Stores Winchelsea/Beach	£0	£0	£0	£0	£470,944	£398,813	£869,757	
Local Store, Etchingham	£0	£0	£732,467	£0	£0	£0	£732,467	
Local Store, Hurst Green	£0	£0	£403,722	£78,595	£0	£0	£482,316	
Local Stores/Village Centres In Rother	£51,893	£368,585	£4,288,164	£2,732,594	£1,104,907	£2,205,483	£10,751,626	
Asda, Eastbourne, Crumbles	£329,548	£1,922,872	£171,063	£60,329	£0	£170,916	£2,654,727	
Sainsbury, Hastings, St Leonards, John Macadam	£197,729	£1,281,915	£869,510	£5,210,224	£3,781,689	£3,008,122	£14,349,188	
Morrison, Hastings, Queens Road	£131,819	£417,601	£158,093	£1,042,045	£1,402,803	£3,008,122	£6,160,482	
Tesco, Hastings, St Leonards, Churchwood Drive	£263,638	£640,957	£869,510	£2,468,001	£1,718,950	£1,880,076	£7,841,132	
Asda, Silverhill, Hastings	£263,638	£961,436	£770,702	£4,387,557	£2,578,424	£2,221,908	£11,183,666	
Large Stores Outside Rother with Significant Influe	£1,186,372	£5,224,781	£2,838,879	£13,168,156	£9,481,866	£10,289,143	£42,189,196	
Asda, Ashford, Kimberley Way	£0	£0	£0	£0	£343,790	£84,446	£428,236	
Budgen, Hawkhurst, Rye Rd	£0	£80,127	£1,163,619	£334,880	£1,098,754	£100,904	£2,778,284	
Budgen, Heathfield, Station Rd	£0	£48,031	£173,612	£0	£81,510	£0	£303,152	
Co-op, Eastbourne, Albert Parade	£0	£80,127	£0	£0	£0	£0	£80,127	
Co-op, Hailsham, The Quintons	£0	£0	£0	£0	£0	£0	£0	
Co-op, Heathfield, High St	£0	£0	£2,885,987	£192,962	£0	£0	£3,078,949	
Co-op, Ore, Fairlight Rd	£0	£0	£0	£0	£39,364	£427,290	£466,654	
Co-op, Polegate, The Centre	£103,917	£0	£0	£0	£0	£0	£103,917	
Co-op, St Leonards, London Rd	£0	£0	£0	£0	£0	£0	£0	
Co-op, St Leonards, Silverhill	£0	£0	£0	£0	£0	£0	£0	
Co-op, Tenterden, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Hailsham, High St	£0	£0	£0	£0	£0	£0	£0	
Costcutter, St Leonards, Battle Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Tenterden, Ashford Rd	£0	£0	£0	£0	£0	£0	£0	
Costcutter, Wadhurst, Sparrows Green Rd	£0	£0	£378,986	£0	£0	£0	£378,986	
Iceland, Hastings, Castle St	£0	£0	£46,434	£0	£0	£171,375	£217,809	
Iceland, Ashford, High St	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Centre	£0	£0	£0	£0	£0	£0	£0	
Iceland, Eastbourne, Langney Road	£51,893	£0	£0	£0	£0	£0	£51,893	
Iceland, Tunbridge Wells, Calverley Rd	£0	£0	£0	£0	£0	£0	£0	
Jempson, Battle, High St	£0	£0	£0	£0	£0	£0	£0	
Lidl, St Leonards, Bohemia Rd	£0	£48,031	£0	£63,324	£274,247	£185,350	£570,951	
Local Store, Hastings	£0	£0	£0	£438,756	£470,944	£201,809	£1,111,508	
Marks & Spencer, Eastbourne	£74,599	£504,672	£0	£0	£0	£0	£579,271	
Marks & Spencer, Priory Meadow Shopping Centr	£209,381	£136,086	£92,868	£63,324	£383,954	£286,255	£1,171,867	
Sainsbury, Ashford, Simon Well Ave	£0	£48,031	£0	£0	£226,499	£0	£274,529	
Sainsbury, Eastbourne, Arndale Centre	£0	£302,573	£0	£0	£39,364	£0	£341,936	
Sainsbury, Eastbourne, Hampden Park	£0	£769,901	£171,063	£63,324	£0	£0	£1,004,288	
Sainsbury, New Romney, Dymchurch Rd	£0	£0	£0	£0	£39,364	£0	£39,364	
Sainsbury, Tunbridge Wells, Linden Park Rd	£0	£0	£1,371,083	£129,638	£0	£0	£1,500,722	
Sainsbury, Tunbridge Wells, St Johns Road	£0	£0	£466,755	£129,638	£39,364	£134,455	£770,212	
Somerfield, Eastbourne, Brassey Ave	£0	£0	£0	£0	£0	£0	£0	
Spar, Hawkhurst, The Moor	£0	£0	£80,744	£220,513	£0	£100,904	£402,161	
Spar, St Leonards, Kings Rd	£74,599	£0	£0	£0	£0	£100,904	£175,504	
Tesco, Ashford, Hythe Rd	£0	£0	£0	£0	£1,197,011	£0	£1,197,011	
Tesco, Eastbourne, Kingfisher Drive, Langney Sh	£282,303	£1,013,225	£124,629	£63,324	£0	£0	£1,483,480	
Tesco, Eastbourne, Lottbridge Drove	£51,893	£446,664	£0	£0	£0	£0	£498,557	
Tesco, St Leonards, Silverhill	£0	£48,031	£0	£274,222	£78,727	£218,901	£619,881	
Tesco, Tenterden, Smallhythe Rd	£0	£0	£171,063	£192,962	£3,805,250	£0	£4,169,275	
Tesco, Tunbridge Wells, Pembury Rd	£0	£0	£544,950	£0	£0	£0	£544,950	
Tesco Express, Heathfield, Station Rd	£74,599	£0	£46,434	£78,595	£0	£0	£199,628	
Tesco Express, St Leonards, Fernside Avenue	£0	£134,389	£0	£0	£0	£0	£134,389	
Waitrose, Eastbourne, High St	£0	£323,237	£0	£0	£0	£0	£323,237	
Waitrose, Hailsham, Vicarage Field	£32,955	£778,044	£39,523	£0	£39,364	£0	£889,886	
Waitrose, Tenterden, High St	£0	£0	£39,523	£63,324	£1,078,920	£134,455	£1,316,222	
Waitrose, Crowborough	£0	£0	£138,331	£0	£0	£0	£138,331	
Other	£375,684	£1,466,531	£2,569,008	£1,096,889	£1,767,080	£1,574,776	£8,849,969	
Other Stores/Locations Outside Rother	£1,331,823	£6,227,700	£10,504,613	£3,405,671	£11,003,504	£3,721,825	£36,195,137	
* Internet/Home Delivery - Ocado/Waitrose	£51,893	£0	£295,692	£208,233	£147,771	£0	£703,589	
* Internet/Home Delivery - Tesco	£103,917	£88,056	£640,398	£141,918	£147,771	£0	£1,122,059	
* Internet/Home Delivery - Sainsburys	£0	£48,031	£124,629	£0	£0	£0	£172,659	
Internet Home Delivery Channels	£155,810	£136,086	£1,060,718	£350,151	£295,543	£0	£1,998,308	
	£23,738,348	£50,929,558	£19,235,818	£26,632,519	£34,380,345	£17,091,422		

TABLE L: Comparison Goods Market Shares 2015 Baseline

	Study Zones						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
Bexhill - Town Centre	36.6%	28.2%	0.4%	5.3%	1.0%	2.1%	16.2%
Battle - Town Centre	0.7%	1.6%	0.4%	11.8%	0.0%	1.3%	2.5%
Rye - Town Centre	0.1%	0.0%	0.0%	0.5%	18.6%	0.9%	3.6%
Ravenside Retail Park, Bexhill	19.1%	14.6%	1.1%	4.3%	3.0%	5.8%	9.6%
Tesco, Ravenside Retail Park	2.2%	1.8%	0.2%	0.2%	0.0%	0.0%	1.0%
Sidley - Local Centre	0.4%	1.7%	0.0%	0.1%	0.0%	0.0%	0.6%
Little Common - Local Centre	0.1%	3.0%	0.0%	0.1%	0.0%	0.1%	0.9%
Robertsbridge	0.0%	0.1%	0.3%	3.2%	0.0%	0.0%	0.5%
Peasmarsh	0.0%	0.0%	0.2%	0.1%	0.8%	0.0%	0.2%
Ticehurst	0.0%	0.0%	2.8%	0.0%	0.1%	0.0%	0.3%
Northium	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%
Sedlescombe	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%
Rother District	**59.2%**	**51.0%**	**5.3%**	**25.9%**	**24.3%**	**10.3%**	**35.5%**
Eastbourne - Town Centre	21.2%	24.7%	2.9%	9.2%	1.7%	5.4%	13.6%
Hastings - Town Centre	7.7%	9.1%	7.0%	27.4%	32.4%	49.7%	19.0%
Tunbridge Wells - Town Centre	0.1%	0.7%	39.9%	11.5%	3.2%	2.0%	6.9%
Ashford - Designer Outlet Village	0.0%	0.0%	0.5%	0.3%	3.9%	1.7%	1.0%
Ashford - Town Centre	0.0%	0.0%	0.0%	0.2%	4.4%	0.4%	0.9%
Bluewater Shopping Centre	0.0%	0.2%	0.2%	0.6%	0.9%	0.4%	0.4%
Brighton - Town Centre	0.3%	0.5%	0.0%	0.6%	0.3%	0.0%	0.4%
Hailsham - Town Centre	0.0%	0.1%	0.3%	0.0%	0.2%	0.3%	0.1%
Heathfield - Town Centre	0.0%	0.0%	8.4%	0.7%	0.3%	0.2%	1.1%
Langney Centre, Eastbourne	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
London	1.4%	0.3%	0.6%	0.5%	1.8%	1.9%	1.0%
Morrisons, Hastings	0.0%	0.2%	0.2%	0.1%	0.0%	0.7%	0.1%
Sainsburys, Hampden Park, Eastbourne	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, John McAdam Way, St Leonards	0.3%	0.2%	0.3%	3.3%	0.6%	2.5%	0.9%
Sainsburys, Linden Park Rd, Tun Wells	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%
Sainsburys, Simon Well, Ashford	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Sovereign (Crumbles) Retail Park, Eastbourne	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.2%
St Leonards - Town Centre	0.3%	0.6%	0.4%	1.4%	1.5%	1.8%	0.9%
Tenterden - Town Centre	0.1%	0.0%	0.3%	0.7%	4.2%	0.0%	0.9%
Tesco, Ashford	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%
Tesco, Churchwood Drive, St Leonards	0.1%	0.3%	1.2%	0.8%	0.3%	2.6%	0.6%
Tesco, Lottbridge Drove, Ebne	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Tunbridge Wells	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Other	0.4%	1.6%	5.1%	2.8%	2.0%	3.4%	2.2%
Tunbridge Wells, Longfield Retail Park	0.2%	0.2%	8.6%	2.5%	1.0%	1.1%	1.7%
Tonbridge Town Centre	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Ore	0.1%	0.1%	1.1%	0.3%	0.9%	2.3%	0.6%
Wyevale Garden Centre, Hastings	0.9%	1.7%	4.0%	1.7%	4.5%	3.1%	2.4%
Others Total	4.2%	7.1%	32.1%	16.5%	27.5%	22.5%	15.7%
Centres/Locations Outside District with Attractio	33.2%	41.5%	81.9%	64.7%	64.6%	79.6%	55.2%
* Internet	4.7%	4.0%	7.7%	5.4%	5.8%	6.0%	5.2%
* Catalogue/Mail Order	2.9%	3.5%	5.0%	3.9%	5.2%	4.1%	4.0%
Internet/Mail Order	7.6%	7.5%	12.8%	9.4%	11.1%	10.1%	9.2%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Study Zones						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
Bexhill - Town Centre	£25,169,066	£35,967,431	£192,517	£3,069,591	£674,483	£712,931	£65,786,019
Battle - Town Centre	£484,852	£2,076,779	£155,799	£6,836,611	£0	£434,468	£9,988,508
Rye - Town Centre	£45,694	£0	£0	£293,925	£13,057,752	£300,211	£13,697,583
Ravenside Retail Park, Bexhill	£13,124,396	£18,632,929	£485,273	£2,474,251	£2,102,965	£1,977,445	£38,797,259
Tesco, Ravenside Retail Park	£1,504,159	£2,254,162	£64,760	£122,204	£0	£0	£3,945,286
Sidley - Local Centre	£271,615	£2,153,559	£0	£54,413	£0	£0	£2,479,587
Little Common - Local Centre	£92,089	£3,773,315	£0	£54,413	£0	£20,147	£3,939,964
Robertsbridge	£0	£113,329	£146,534	£1,872,339	£0	£0	£2,132,202
Peasmarsh	£0	£0	£64,760	£54,413	£558,783	£0	£677,956
Ticehurst	£0	£0	£1,180,598	£0	£45,118	£0	£1,225,716
Northium	£0	£0	£0	£0	£658,426	£0	£658,426
Sedlescombe	£0	£0	£0	£133,867	£0	£54,636	£188,503
Rother District	**£40,691,871**	**£64,971,504**	**£2,290,243**	**£14,966,025**	**£17,097,527**	**£3,499,837**	**£143,517,007**
Eastbourne - Town Centre	£14,532,946	£31,455,763	£1,256,124	£5,313,956	£1,175,933	£1,824,980	£55,559,701
Hastings - Town Centre	£5,308,343	£11,562,054	£2,991,257	£15,817,890	£22,775,353	£16,832,365	£75,287,261
Tunbridge Wells - Town Centre	£50,095	£911,392	£17,088,012	£6,648,878	£2,231,170	£682,230	£27,611,778
Ashford - Designer Outlet Village	£0	£35,268	£193,777	£181,085	£2,723,827	£562,165	£3,696,122
Ashford - Town Centre	£0	£0	£0	£121,287	£3,129,409	£124,796	£3,375,492
Bluewater Shopping Centre	£0	£288,387	£96,198	£325,829	£647,479	£149,623	£1,507,515
Brighton - Town Centre	£212,937	£628,374	£0	£347,424	£229,433	£0	£1,418,168
Hailsham - Town Centre	£0	£91,560	£107,529	£21,063	£150,099	£113,199	£483,449
Heathfield - Town Centre	£0	£55,857	£3,615,356	£398,869	£231,085	£74,783	£4,375,949
Langney Centre, Eastbourne	£64,952	£35,545	£0	£0	£11,104	£0	£111,601
London	£941,144	£353,647	£272,555	£287,626	£1,251,945	£659,554	£3,766,470
Morrisons, Hastings	£0	£210,455	£64,760	£53,047	£0	£242,515	£570,778
Sainsburys, Hampden Park, Eastbourne	£0	£169,232	£0	£0	£0	£0	£169,232
Sainsburys, John McAdam Way, St Leonards	£195,457	£217,979	£129,521	£1,899,213	£395,069	£848,257	£3,685,498
Sainsburys, Linden Park Rd, Tun Wells	£0	£0	£343,076	£0	£0	£0	£343,076
Sainsburys, Simon Well, Ashford	£0	£0	£0	£0	£110,657	£0	£110,657
Sovereign (Crumbles) Retail Park, Eastbourne	£13,079	£989,790	£0	£0	£0	£23,662	£1,026,532
St Leonards - Town Centre	£216,765	£700,855	£182,775	£833,189	£1,049,853	£597,563	£3,581,000
Tenterden - Town Centre	£91,389	£0	£114,533	£420,656	£2,940,143	£0	£3,566,721
Tesco, Ashford	£0	£0	£0	£0	£282,467	£0	£282,467
Tesco, Churchwood Drive, St Leonards	£57,924	£333,063	£496,615	£475,515	£223,215	£891,431	£2,477,762
Tesco, Lottbridge Drove, Ebne	£0	£182,388	£0	£0	£0	£0	£182,388
Tesco, Tunbridge Wells	£0	£48,378	£64,760	£0	£0	£0	£113,139
Other	£294,665	£2,055,370	£2,199,292	£1,617,058	£1,430,538	£1,158,945	£8,755,869
Tunbridge Wells, Longfield Retail Park	£149,984	£302,283	£3,678,307	£1,443,992	£677,013	£363,032	£6,614,611
Tonbridge Town Centre	£0	£0	£37,881	£0	£0	£0	£37,881
Ore	£50,095	£172,611	£478,993	£147,794	£641,102	£778,833	£2,269,428
Wyevale Garden Centre, Hastings	£612,857	£2,131,943	£1,696,631	£956,725	£3,198,255	£1,052,925	£9,649,336
Others Total	£2,901,250	£9,002,985	£13,772,560	£9,530,373	£19,322,692	£7,641,283	£62,171,143
Centres/Locations Outside District with Attractio	**£22,792,633**	**£52,932,193**	**£35,107,953**	**£37,311,096**	**£45,505,149**	**£26,980,859**	**£220,629,883**
* Internet	£3,200,600	£5,034,438	£3,309,136	£3,142,317	£4,110,494	£2,023,328	£20,820,312
* Catalogue/Mail Order	£2,018,824	£4,479,123	£2,159,870	£2,273,601	£3,678,061	£1,383,150	£15,992,629
Internet/Mail Order	**£5,219,424**	**£9,513,561**	**£5,469,006**	**£5,415,917**	**£7,788,555**	**£3,406,477**	**£36,812,941**
	£68,703,928	£127,417,258	£42,867,201	£57,693,039	£70,391,230	£33,887,174	£400,959,831

TABLE M: Comparison Goods Market Shares 2015 with Sainsbury Redevelopment

	Study Zones						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
Sainsbury Redevelopment (Net Addition)	2.04%	1.77%	0.01%	0.02%	0.00%	0.00%	**2.30%**
Bexhill - Town Centre	36.00%	27.60%	0.45%	5.32%	0.96%	2.10%	16.16%
Battle - Town Centre	0.70%	1.60%	0.36%	11.84%	0.00%	1.28%	2.47%
Rye - Town Centre	0.07%	0.00%	0.00%	0.51%	18.55%	0.89%	3.61%
Ravenside Retail Park, Bexhill	18.40%	14.40%	1.13%	4.29%	2.99%	5.84%	9.57%
Tesco, Ravenside Retail Park	1.90%	1.55%	0.15%	0.21%	0.00%	0.00%	0.97%
Sidley - Local Centre	0.37%	1.65%	0.00%	0.09%	0.00%	0.00%	0.60%
Little Common - Local Centre	0.11%	2.90%	0.00%	0.09%	0.00%	0.06%	0.95%
Robertsbridge	0.00%	0.09%	0.34%	3.25%	0.00%	0.00%	0.53%
Peasmarsh	0.00%	0.00%	0.15%	0.09%	0.79%	0.00%	0.18%
Ticehurst	0.00%	0.00%	2.75%	0.00%	0.06%	0.00%	0.31%
Northium	0.00%	0.00%	0.00%	0.00%	0.94%	0.00%	0.17%
Sedlescombe	0.00%	0.00%	0.00%	0.23%	0.00%	0.16%	0.05%
Rother District	**57.55%**	**49.79%**	**5.34%**	**25.93%**	**24.29%**	**10.33%**	**35.55%**
Eastbourne - Town Centre	20.82%	24.20%	2.93%	9.21%	1.67%	5.39%	13.62%
Hastings - Town Centre	7.70%	9.00%	6.98%	27.41%	32.36%	49.67%	18.98%
Tunbridge Wells - Town Centre	0.07%	0.72%	39.85%	11.52%	3.17%	2.01%	6.92%
Ashford - Designer Outlet Village	0.00%	0.03%	0.45%	0.31%	3.87%	1.66%	0.96%
Ashford - Town Centre	0.00%	0.00%	0.00%	0.21%	4.45%	0.37%	0.89%
Bluewater Shopping Centre	0.00%	0.23%	0.22%	0.56%	0.92%	0.44%	0.38%
Brighton - Town Centre	0.31%	0.49%	0.00%	0.60%	0.33%	0.00%	0.35%
Hailsham - Town Centre	0.00%	0.07%	0.25%	0.04%	0.21%	0.33%	0.12%
Heathfield - Town Centre	0.00%	0.04%	8.43%	0.69%	0.33%	0.22%	1.10%
Langney Centre, Eastbourne	0.09%	0.03%	0.00%	0.00%	0.02%	0.00%	0.03%
London	1.37%	0.28%	0.64%	0.50%	1.78%	1.95%	0.96%
Morrisons, Hastings	0.00%	0.17%	0.15%	0.09%	0.00%	0.72%	0.14%
Sainsburys, Hampden Park, Eastbourne	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Sainsburys, John McAdam Way, St Leonards	0.28%	0.17%	0.30%	3.29%	0.56%	2.50%	0.92%
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.80%	0.00%	0.00%	0.00%	0.09%
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.16%	0.00%	0.03%
Sovereign (Crumbles) Retail Park, Eastbourne	0.02%	0.78%	0.00%	0.00%	0.00%	0.07%	0.25%
St Leonards - Town Centre	0.32%	0.55%	0.43%	1.44%	1.49%	1.76%	0.90%
Tenterden - Town Centre	0.13%	0.00%	0.27%	0.73%	4.18%	0.00%	0.93%
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.40%	0.00%	0.07%
Tesco, Churchwood Drive, St Leonards	0.08%	0.26%	1.16%	0.82%	0.32%	2.63%	0.62%
Tesco, Lottbridge Drove, Ebne	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%	0.04%
Tesco, Tunbridge Wells	0.00%	0.04%	0.15%	0.00%	0.00%	0.00%	0.03%
Other	0.43%	1.60%	5.13%	2.80%	2.03%	3.42%	2.19%
Tunbridge Wells, Longfield Retail Park	0.22%	0.24%	8.58%	2.50%	0.96%	1.07%	1.66%
Tonbridge Town Centre	0.00%	0.00%	0.09%	0.00%	0.00%	0.00%	0.01%
Ore	0.07%	0.14%	1.12%	0.26%	0.91%	2.30%	0.57%
Wyevale Garden Centre, Hastings	0.89%	1.67%	3.96%	1.66%	4.54%	3.11%	2.43%
Others Total	4.22%	7.05%	32.13%	16.52%	27.45%	22.55%	15.71%
Centres/Locations Outside District with Attraction	32.82%	40.97%	81.89%	64.66%	64.65%	79.62%	55.23%
* Internet	4.66%	3.95%	7.72%	5.45%	5.84%	5.97%	5.21%
* Catalogue/Mail Order	2.94%	3.52%	5.04%	3.94%	5.23%	4.08%	4.01%
Internet/Mail Order	7.60%	7.47%	12.76%	9.39%	11.06%	10.05%	9.22%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	102.30%

	Study Zones							
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair		
Trade Draw	36.00%	58.10%	0.10%	0.30%	0.00%	0.00%	94.50%	5.50%
Sainsbury Redevelopment (Net Addition)	**£1,400,620**	**£2,260,446**	**£3,891**	**£11,672**	**£0**	**£0**	***£3,890,612***	**£213,984**
Bexhill - Town Centre	£24,733,414	£35,167,163	£192,517	£3,069,591	£674,483	£712,931	£64,550,100	
Battle - Town Centre	£480,927	£2,038,676	£155,799	£6,830,856	£0	£434,468	£9,940,726	
Rye - Town Centre	£45,694	£0	£0	£293,925	£13,057,752	£300,211	£13,697,583	
Ravenside Retail Park, Bexhill	£12,641,523	£18,348,085	£485,273	£2,474,251	£2,102,965	£1,977,445	£38,029,541	
Tesco, Ravenside Retail Park	£1,305,375	£1,974,968	£64,760	£122,204	£0	£0	£3,467,307	
Sidley - Local Centre	£254,205	£2,102,385	£0	£54,413	£0	£0	£2,411,002	
Little Common - Local Centre	£75,574	£3,695,100	£0	£54,413	£0	£20,147	£3,845,234	
Robertsbridge	£0	£113,329	£146,534	£1,872,339	£0	£0	£2,132,202	
Peasmarsh	£0	£0	£64,760	£54,413	£558,783	£0	£677,956	
Ticehurst	£0	£0	£1,180,598	£0	£45,118	£0	£1,225,716	
Northium	£0	£0	£0	£0	£658,426	£0	£658,426	
Sedlescombe	£0	£0	£0	£133,867	£0	£54,636	£188,503	
Rother District	**£39,536,712**	**£63,439,706**	**£2,290,243**	**£14,960,270**	**£17,097,527**	**£3,499,837**	**£140,824,295**	
Eastbourne - Town Centre	£14,304,158	£30,834,976	£1,256,124	£5,313,956	£1,175,933	£1,824,980	£54,710,128	
Hastings - Town Centre	£5,290,202	£11,467,553	£2,991,257	£15,813,662	£22,775,353	£16,832,365	£75,170,392	
Tunbridge Wells - Town Centre	£50,095	£911,392	£17,082,580	£6,648,878	£2,231,170	£682,230	£27,606,345	
Ashford - Designer Outlet Village	£0	£35,268	£193,777	£181,085	£2,723,827	£562,165	£3,696,122	
Ashford - Town Centre	£0	£0	£0	£121,287	£3,129,409	£124,796	£3,375,492	
Bluewater Shopping Centre	£0	£288,387	£96,198	£325,829	£647,479	£149,623	£1,507,515	
Brighton - Town Centre	£212,937	£628,374	£0	£347,424	£229,433	£0	£1,418,168	
Hailsham - Town Centre	£0	£91,560	£107,529	£21,063	£150,099	£113,199	£483,449	
Heathfield - Town Centre	£0	£55,857	£3,615,356	£398,869	£231,085	£74,783	£4,375,949	
Langney Centre, Eastbourne	£64,952	£35,545	£0	£0	£11,104	£0	£111,601	
London	£941,144	£353,647	£272,555	£287,626	£1,251,945	£659,554	£3,766,470	
Morrisons, Hastings	£0	£210,455	£64,760	£53,047	£0	£242,515	£570,778	
Sainsburys, Hampden Park, Eastbourne	£0	£169,232	£0	£0	£0	£0	£169,232	
Sainsburys, John McAdam Way, St Leonards	£195,457	£217,979	£129,521	£1,899,213	£395,069	£848,257	£3,685,498	
Sainsburys, Linden Park Rd, Tun Wells	£0	£0	£343,076	£0	£0	£0	£343,076	
Sainsburys, Simon Well, Ashford	£0	£0	£0	£0	£110,657	£0	£110,657	
Sovereign (Crumbles) Retail Park, Eastbourne	£13,079	£989,790	£0	£0	£0	£23,662	£1,026,532	
St Leonards - Town Centre	£216,765	£700,855	£182,775	£833,189	£1,049,853	£597,563	£3,581,000	
Tenterden - Town Centre	£91,389	£0	£114,533	£420,656	£2,940,143	£0	£3,566,721	
Tesco, Ashford	£0	£0	£0	£0	£282,467	£0	£282,467	
Tesco, Churchwood Drive, St Leonards	£57,924	£333,063	£496,615	£475,515	£223,215	£891,431	£2,477,762	
Tesco, Lottbridge Drove, Ebne	£0	£182,388	£0	£0	£0	£0	£182,388	
Tesco, Tunbridge Wells	£0	£48,378	£64,760	£0	£0	£0	£113,139	
Other	£294,665	£2,038,676	£2,199,292	£1,617,058	£1,430,538	£1,158,945	£8,739,175	
Tunbridge Wells, Longfield Retail Park	£149,984	£302,283	£3,678,307	£1,443,992	£677,013	£363,032	£6,614,611	
Tonbridge Town Centre	£0	£0	£37,881	£0	£0	£0	£37,881	
Ore	£50,095	£172,611	£478,993	£147,794	£641,102	£778,833	£2,269,428	
Wyevale Garden Centre, Hastings	£612,857	£2,131,943	£1,696,631	£956,725	£3,198,255	£1,052,925	£9,649,336	
Others Total	£2,901,250	£8,986,291	£13,772,560	£9,530,373	£19,322,692	£7,641,283	£62,154,449	
Centres/Locations Outside District with Attraction	**£22,545,705**	**£52,200,212**	**£35,102,520**	**£37,306,869**	**£45,505,149**	**£26,980,859**	**£219,641,314**	
* Internet	£3,200,600	£5,034,438	£3,309,136	£3,142,317	£4,110,494	£2,023,328	£20,820,312	
* Catalogue/Mail Order	£2,018,824	£4,479,123	£2,159,870	£2,273,601	£3,678,061	£1,383,150	£15,992,629	
Internet/Mail Order	**£5,219,424**	**£9,513,561**	**£5,469,006**	**£5,415,917**	**£7,788,555**	**£3,406,477**	**£36,812,941**	
	£67,301,841	£125,153,480	£42,861,769	£57,683,056	£70,391,230	£33,887,174	£397,278,550	

TABLE N: Comparison Goods Market Shares 2015 with New Sainsbury at Beeching Road

Study Zones

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
Sainsbury New Store Beeching Rd	**5.12%**	**4.18%**	**0.12%**	**0.17%**	**0.04%**	**0.07%**	
Bexhill - Town Centre	33.44%	27.26%	0.45%	5.30%	0.92%	2.03%	16.16%
Battle - Town Centre	0.71%	1.60%	0.36%	11.75%	0.00%	1.28%	2.47%
Rye - Town Centre	0.07%	0.00%	0.00%	0.51%	18.55%	0.89%	3.61%
Ravenside Retail Park, Bexhill	18.50%	14.30%	1.13%	4.29%	2.99%	5.84%	9.57%
Tesco, Ravenside Retail Park	1.40%	1.40%	0.15%	0.21%	0.00%	0.00%	0.97%
Sidley - Local Centre	0.35%	1.62%	0.00%	0.09%	0.00%	0.00%	0.60%
Little Common - Local Centre	0.12%	2.70%	0.00%	0.09%	0.00%	0.06%	0.95%
Robertsbridge	0.00%	0.09%	0.34%	3.25%	0.00%	0.00%	0.53%
Peasmarsh	0.00%	0.00%	0.15%	0.09%	0.79%	0.00%	0.18%
Ticehurst	0.00%	0.00%	2.75%	0.00%	0.06%	0.00%	0.31%
Northium	0.00%	0.00%	0.00%	0.00%	0.94%	0.00%	0.17%
Sedlescombe	0.00%	0.00%	0.00%	0.23%	0.00%	0.16%	0.05%
Rother District	**54.58%**	**48.97%**	**5.34%**	**25.82%**	**24.25%**	**10.25%**	**35.55%**
Eastbourne - Town Centre	20.80%	23.00%	2.90%	9.20%	1.67%	5.39%	13.62%
Hastings - Town Centre	7.60%	8.60%	6.95%	27.40%	32.36%	49.67%	18.98%
Tunbridge Wells - Town Centre	0.07%	0.72%	39.80%	11.50%	3.17%	2.01%	6.92%
Ashford - Designer Outlet Village	0.00%	0.03%	0.45%	0.31%	3.87%	1.66%	0.96%
Ashford - Town Centre	0.00%	0.00%	0.00%	0.21%	4.45%	0.37%	0.89%
Bluewater Shopping Centre	0.00%	0.23%	0.22%	0.56%	0.92%	0.44%	0.38%
Brighton - Town Centre	0.31%	0.49%	0.00%	0.60%	0.33%	0.00%	0.35%
Hailsham - Town Centre	0.00%	0.07%	0.25%	0.04%	0.21%	0.33%	0.12%
Heathfield - Town Centre	0.00%	0.04%	8.43%	0.69%	0.33%	0.22%	1.10%
Langney Centre, Eastbourne	0.09%	0.03%	0.00%	0.00%	0.02%	0.00%	0.03%
London	1.37%	0.28%	0.64%	0.50%	1.78%	1.95%	0.96%
Morrisons, Hastings	0.00%	0.17%	0.15%	0.09%	0.00%	0.72%	0.14%
Sainsburys, Hampden Park, Eastbourne	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Sainsburys, John McAdam Way, St Leonards	0.28%	0.17%	0.30%	3.29%	0.56%	2.50%	0.92%
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.80%	0.00%	0.00%	0.00%	0.09%
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.16%	0.00%	0.03%
Sovereign (Crumbles) Retail Park, Eastbourne	0.02%	0.78%	0.00%	0.00%	0.00%	0.07%	0.25%
St Leonards - Town Centre	0.32%	0.55%	0.43%	1.44%	1.49%	1.76%	0.90%
Tenterden - Town Centre	0.13%	0.00%	0.27%	0.73%	4.18%	0.00%	0.93%
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.40%	0.00%	0.07%
Tesco, Churchwood Drive, St Leonards	0.08%	0.26%	1.16%	0.82%	0.32%	2.63%	0.62%
Tesco, Lottbridge Drove, Ebne	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%	0.04%
Tesco, Tunbridge Wells	0.00%	0.04%	0.15%	0.00%	0.00%	0.00%	0.03%
Other	0.43%	1.61%	5.13%	2.80%	2.03%	3.42%	2.19%
Tunbridge Wells, Longfield Retail Park	0.22%	0.24%	8.58%	2.50%	0.96%	1.07%	1.66%
Tonbridge Town Centre	0.00%	0.00%	0.09%	0.00%	0.00%	0.00%	0.01%
Ore	0.07%	0.14%	1.12%	0.26%	0.91%	2.30%	0.57%
Wyevale Garden Centre, Hastings	0.89%	1.67%	3.96%	1.66%	4.54%	3.11%	2.43%
Others Total	4.22%	7.07%	32.13%	16.52%	27.45%	22.55%	15.71%
Centres/Locations Outside District with Attractio	32.70%	39.38%	81.78%	64.62%	64.65%	79.62%	55.23%
* Internet	4.66%	3.95%	7.72%	5.45%	5.84%	5.97%	5.21%
* Catalogue/Mail Order	2.94%	3.52%	5.04%	3.94%	5.23%	4.08%	4.01%
Internet/Mail Order	7.60%	7.47%	12.76%	9.39%	11.06%	10.05%	9.22%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Study Zones

	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair		
Trade Draw	35.00%	53.00%	0.50%	1.00%	0.25%	0.25%	90.00%	10.00%
Sainsbury New Store Beeching Rd	**£3,519,811**	**£5,330,000**	**£50,283**	**£100,566**	**£25,142**	**£25,142**	***£10,056,604***	**£1,005,660**
Bexhill - Town Centre	£22,974,594	£34,733,945	£192,517	£3,057,731	£647,599	£687,910	£62,294,296	
Battle - Town Centre	£484,852	£2,038,676	£155,799	£6,778,932	£0	£434,468	£9,892,727	
Rye - Town Centre	£45,694	£0	£0	£293,925	£13,057,752	£300,211	£13,697,583	
Ravenside Retail Park, Bexhill	£12,710,227	£18,220,668	£485,273	£2,474,251	£2,102,965	£1,977,445	£37,970,828	
Tesco, Ravenside Retail Park	£961,855	£1,783,842	£64,760	£122,204	£0	£0	£2,932,661	
Sidley - Local Centre	£240,464	£2,064,160	£0	£54,413	£0	£0	£2,359,036	
Little Common - Local Centre	£82,445	£3,440,266	£0	£54,413	£0	£20,147	£3,597,270	
Robertsbridge	£0	£113,329	£146,534	£1,872,339	£0	£0	£2,132,202	
Peasmarsh	£0	£0	£64,760	£54,413	£558,783	£0	£677,956	
Ticehurst	£0	£0	£1,180,598	£0	£45,118	£0	£1,225,716	
Northium	£0	£0	£0	£0	£658,426	£0	£658,426	
Sedlescombe	£0	£0	£0	£133,867	£0	£54,636	£188,503	
Rother District	**£37,500,130**	**£62,394,885**	**£2,290,243**	**£14,896,487**	**£17,070,643**	**£3,474,816**	**£137,627,203**	
Eastbourne - Town Centre	£14,290,417	£29,305,969	£1,243,149	£5,307,760	£1,175,933	£1,824,980	£53,148,209	
Hastings - Town Centre	£5,221,499	£10,957,884	£2,979,270	£15,807,893	£22,775,353	£16,832,365	£74,574,263	
Tunbridge Wells - Town Centre	£50,095	£911,392	£17,061,146	£6,634,699	£2,231,170	£682,230	£27,570,733	
Ashford - Designer Outlet Village	£0	£35,268	£193,777	£181,085	£2,723,827	£562,165	£3,696,122	
Ashford - Town Centre	£0	£0	£0	£121,287	£3,129,409	£124,796	£3,375,492	
Bluewater Shopping Centre	£0	£288,387	£96,198	£325,829	£647,479	£149,623	£1,507,515	
Brighton - Town Centre	£212,937	£628,374	£0	£347,424	£229,433	£0	£1,418,168	
Hailsham - Town Centre	£0	£91,560	£107,529	£21,063	£150,099	£113,199	£483,449	
Heathfield - Town Centre	£0	£55,857	£3,615,356	£398,869	£231,085	£74,783	£4,375,949	
Langney Centre, Eastbourne	£64,952	£35,545	£0	£0	£11,104	£0	£111,601	
London	£941,144	£353,647	£272,555	£287,626	£1,251,945	£659,554	£3,766,470	
Morrisons, Hastings	£0	£210,455	£64,760	£53,047	£0	£242,515	£570,778	
Sainsburys, Hampden Park, Eastbourne	£0	£169,232	£0	£0	£0	£0	£169,232	
Sainsburys, John McAdam Way, St Leonards	£195,457	£217,979	£129,521	£1,899,213	£395,069	£848,257	£3,685,498	
Sainsburys, Linden Park Rd, Tun Wells	£0	£0	£343,076	£0	£0	£0	£343,076	
Sainsburys, Simon Well, Ashford	£0	£0	£0	£0	£110,657	£0	£110,657	
Sovereign (Crumbles) Retail Park, Eastbourne	£13,079	£989,790	£0	£0	£0	£23,662	£1,026,532	
St Leonards - Town Centre	£216,765	£700,855	£182,775	£833,189	£1,049,853	£597,563	£3,581,000	
Tenterden - Town Centre	£91,389	£0	£114,533	£420,656	£2,940,143	£0	£3,566,721	
Tesco, Ashford	£0	£0	£0	£0	£282,467	£0	£282,467	
Tesco, Churchwood Drive, St Leonards	£57,924	£333,063	£496,615	£475,515	£223,215	£891,431	£2,477,762	
Tesco, Lottbridge Drove, Ebne	£0	£182,388	£0	£0	£0	£0	£182,388	
Tesco, Tunbridge Wells	£0	£48,378	£64,760	£0	£0	£0	£113,139	
Other	£294,665	£2,055,370	£2,199,292	£1,617,058	£1,430,538	£1,158,945	£8,755,869	
Tunbridge Wells, Longfield Retail Park	£149,984	£302,283	£3,678,307	£1,443,992	£677,013	£363,032	£6,614,611	
Tonbridge Town Centre	£0	£0	£37,881	£0	£0	£0	£37,881	
Ore	£50,095	£172,611	£478,993	£147,794	£641,102	£778,833	£2,269,428	
Wyevale Garden Centre, Hastings	£612,857	£2,131,943	£1,696,631	£956,725	£3,198,255	£1,052,925	£9,649,336	
Others Total	£2,901,250	£9,002,985	£13,772,560	£9,530,373	£19,322,692	£7,641,283	£62,171,143	
Centres/Locations Outside District with Attractio	**£22,463,260**	**£50,178,230**	**£35,056,125**	**£37,280,725**	**£45,505,149**	**£26,980,859**	**£217,464,348**	
* Internet	£3,200,600	£5,034,438	£3,309,136	£3,142,317	£4,110,494	£2,023,328	£20,820,312	
* Catalogue/Mail Order	£2,018,824	£4,479,123	£2,159,870	£2,273,601	£3,678,061	£1,383,150	£15,992,629	
Internet/Mail Order	**£5,219,424**	**£9,513,561**	**£5,469,006**	**£5,415,917**	**£7,788,555**	**£3,406,477**	**£36,812,941**	
	£65,182,814	£122,086,676	£42,815,373	£57,593,129	£70,364,346	£33,862,153	£391,904,492	

TABLE O: Comparison Goods Market Shares 2015 with Waitrose at Beeching Road

	Study Zones						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
New Waitrose Beeching Road South	**1.17%**	**0.90%**	**0.11%**	**0.12%**	**0.00%**	**0.00%**	**2.30%**
Bexhill - Town Centre	36.30%	28.00%	0.45%	5.30%	0.96%	2.10%	16.16%
Battle - Town Centre	0.70%	1.60%	0.36%	11.75%	0.00%	1.28%	2.47%
Rye - Town Centre	0.07%	0.00%	0.00%	0.51%	18.55%	0.89%	3.61%
Ravenside Retail Park, Bexhill	18.70%	14.40%	1.13%	4.29%	2.99%	5.84%	9.57%
Tesco, Ravenside Retail Park	2.00%	1.67%	0.15%	0.21%	0.00%	0.00%	0.97%
Sidley - Local Centre	0.40%	1.65%	0.00%	0.09%	0.00%	0.00%	0.60%
Little Common - Local Centre	0.13%	2.92%	0.00%	0.09%	0.00%	0.06%	0.95%
Robertsbridge	0.00%	0.09%	0.34%	3.25%	0.00%	0.00%	0.53%
Peasmarsh	0.00%	0.00%	0.15%	0.09%	0.79%	0.00%	0.18%
Ticehurst	0.00%	0.00%	2.75%	0.00%	0.06%	0.00%	0.31%
Northium	0.00%	0.00%	0.00%	0.00%	0.94%	0.00%	0.17%
Sedlescombe	0.00%	0.00%	0.00%	0.23%	0.00%	0.16%	0.05%
Rother District	**58.30%**	**50.33%**	**5.34%**	**25.82%**	**24.29%**	**10.33%**	**35.55%**
Eastbourne - Town Centre	20.91%	24.45%	2.93%	9.21%	1.67%	5.39%	13.62%
Hastings - Town Centre	7.73%	9.07%	6.98%	27.42%	32.36%	49.67%	18.98%
Tunbridge Wells - Town Centre	0.07%	0.72%	39.76%	11.52%	3.17%	2.01%	6.92%
Ashford - Designer Outlet Village	0.00%	0.03%	0.45%	0.31%	3.87%	1.66%	0.96%
Ashford - Town Centre	0.00%	0.00%	0.00%	0.21%	4.45%	0.37%	0.89%
Bluewater Shopping Centre	0.00%	0.23%	0.22%	0.56%	0.92%	0.44%	0.38%
Brighton - Town Centre	0.31%	0.49%	0.00%	0.60%	0.33%	0.00%	0.35%
Hailsham - Town Centre	0.00%	0.07%	0.25%	0.04%	0.21%	0.33%	0.12%
Heathfield - Town Centre	0.00%	0.04%	8.43%	0.69%	0.33%	0.22%	1.10%
Langney Centre, Eastbourne	0.09%	0.03%	0.00%	0.00%	0.02%	0.00%	0.03%
London	1.37%	0.28%	0.64%	0.50%	1.78%	1.95%	0.96%
Morrisons, Hastings	0.00%	0.17%	0.15%	0.09%	0.00%	0.72%	0.14%
Sainsburys, Hampden Park, Eastbourne	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Sainsburys, John McAdam Way, St Leonards	0.28%	0.17%	0.30%	3.29%	0.56%	2.50%	0.92%
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.80%	0.00%	0.00%	0.00%	0.09%
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.16%	0.00%	0.03%
Sovereign (Crumbles) Retail Park, Eastbourne	0.02%	0.78%	0.00%	0.00%	0.00%	0.07%	0.25%
St Leonards - Town Centre	0.32%	0.55%	0.43%	1.44%	1.49%	1.76%	0.90%
Tenterden - Town Centre	0.13%	0.00%	0.27%	0.73%	4.18%	0.00%	0.93%
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.40%	0.00%	0.07%
Tesco, Churchwood Drive, St Leonards	0.08%	0.26%	1.16%	0.82%	0.32%	2.63%	0.62%
Tesco, Lottbridge Drove, Ebne	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%	0.04%
Tesco, Tunbridge Wells	0.00%	0.04%	0.15%	0.00%	0.00%	0.00%	0.03%
Other	0.43%	1.61%	5.13%	2.80%	2.03%	3.42%	2.19%
Tunbridge Wells, Longfield Retail Park	0.22%	0.24%	8.58%	2.50%	0.96%	1.07%	1.66%
Tonbridge Town Centre	0.00%	0.00%	0.09%	0.00%	0.00%	0.00%	0.01%
Ore	0.07%	0.14%	1.12%	0.26%	0.91%	2.30%	0.57%
Wyevale Garden Centre, Hastings	0.89%	1.67%	3.96%	1.66%	4.54%	3.11%	2.43%
Others Total	4.22%	7.07%	32.13%	16.52%	27.45%	22.55%	15.71%
Centres/Locations Outside District with Attractio	32.93%	41.31%	81.80%	64.67%	64.65%	79.62%	55.23%
* Internet	4.66%	3.95%	7.72%	5.45%	5.84%	5.97%	5.21%
* Catalogue/Mail Order	2.94%	3.52%	5.04%	3.94%	5.23%	4.08%	4.01%
Internet/Mail Order	7.60%	7.47%	12.76%	9.39%	11.06%	10.05%	9.22%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	102.30%

	Study Zones							
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair		
Trade Draw	35%	50%	2%	3%	0%	0%	90%	10%
Waitrose, Beeching Road South	**£805,786**	**£1,151,123**	**£46,045**	**£69,067**	**£0**	**£0**	***£2,302,246***	**£230,225**
Bexhill - Town Centre	£24,939,526	£35,676,832	£192,517	£3,057,731	£674,483	£712,931	£65,254,021	
Battle - Town Centre	£480,927	£2,038,676	£155,799	£6,778,932	£0	£434,468	£9,888,802	
Rye - Town Centre	£45,694	£0	£0	£293,925	£13,057,752	£300,211	£13,697,583	
Ravenside Retail Park, Bexhill	£12,847,635	£18,348,085	£485,273	£2,474,251	£2,102,965	£1,977,445	£38,235,653	
Tesco, Ravenside Retail Park	£1,374,079	£2,127,868	£64,760	£122,204	£0	£0	£3,688,911	
Sidley - Local Centre	£271,615	£2,102,385	£0	£54,413	£0	£0	£2,428,412	
Little Common - Local Centre	£92,089	£3,720,584	£0	£54,413	£0	£20,147	£3,887,232	
Robertsbridge	£0	£113,329	£146,534	£1,872,339	£0	£0	£2,132,202	
Peasmarsh	£0	£0	£64,760	£54,413	£558,783	£0	£677,956	
Ticehurst	£0	£0	£1,180,598	£0	£45,118	£0	£1,225,716	
Northium	£0	£0	£0	£0	£658,426	£0	£658,426	
Sedlescombe	£0	£0	£0	£133,867	£0	£54,636	£188,503	
Rother District	**£40,051,564**	**£64,127,759**	**£2,290,243**	**£14,896,487**	**£17,097,527**	**£3,499,837**	**£141,963,417**	
Eastbourne - Town Centre	£14,365,991	£31,153,520	£1,256,124	£5,313,956	£1,175,933	£1,824,980	£55,090,504	
Hastings - Town Centre	£5,308,343	£11,562,054	£2,991,257	£15,817,890	£22,775,353	£16,832,365	£75,287,261	
Tunbridge Wells - Town Centre	£50,095	£911,392	£17,043,999	£6,648,878	£2,231,170	£682,230	£27,567,765	
Ashford - Designer Outlet Village	£0	£35,268	£193,777	£181,085	£2,723,827	£562,165	£3,696,122	
Ashford - Town Centre	£0	£0	£0	£121,287	£3,129,409	£124,796	£3,375,492	
Bluewater Shopping Centre	£0	£288,387	£96,198	£325,829	£647,479	£149,623	£1,507,515	
Brighton - Town Centre	£212,937	£628,374	£0	£347,424	£229,433	£0	£1,418,168	
Hailsham - Town Centre	£0	£91,560	£107,529	£21,063	£150,099	£113,199	£483,449	
Heathfield - Town Centre	£0	£55,857	£3,615,356	£398,869	£231,085	£74,783	£4,375,949	
Langney Centre, Eastbourne	£64,952	£35,545	£0	£0	£11,104	£0	£111,601	
London	£941,144	£353,647	£272,555	£287,626	£1,251,945	£659,554	£3,766,470	
Morrisons, Hastings	£0	£210,455	£64,760	£53,047	£0	£242,515	£570,778	
Sainsburys, Hampden Park, Eastbourne	£0	£169,232	£0	£0	£0	£0	£169,232	
Sainsburys, John McAdam Way, St Leonards	£195,457	£217,979	£129,521	£1,899,213	£395,069	£848,257	£3,685,498	
Sainsburys, Linden Park Rd, Tun Wells	£0	£0	£343,076	£0	£0	£0	£343,076	
Sainsburys, Simon Well, Ashford	£0	£0	£0	£0	£110,657	£0	£110,657	
Sovereign (Crumbles) Retail Park, Eastbourne	£13,079	£989,790	£0	£0	£0	£23,662	£1,026,532	
St Leonards - Town Centre	£216,765	£700,855	£182,775	£833,189	£1,049,853	£597,563	£3,581,000	
Tenterden - Town Centre	£91,389	£0	£114,533	£420,656	£2,940,143	£0	£3,566,721	
Tesco, Ashford	£0	£0	£0	£0	£282,467	£0	£282,467	
Tesco, Churchwood Drive, St Leonards	£57,924	£333,063	£496,615	£475,515	£223,215	£891,431	£2,477,762	
Tesco, Lottbridge Drove, Ebne	£0	£182,388	£0	£0	£0	£0	£182,388	
Tesco, Tunbridge Wells	£0	£48,378	£64,760	£0	£0	£0	£113,139	
Other	£294,665	£2,055,370	£2,199,292	£1,617,058	£1,430,538	£1,158,945	£8,755,869	
Tunbridge Wells, Longfield Retail Park	£149,984	£302,283	£3,678,307	£1,443,992	£677,013	£363,032	£6,614,611	
Tonbridge Town Centre	£0	£0	£37,881	£0	£0	£0	£37,881	
Ore	£50,095	£172,611	£478,993	£147,794	£641,102	£778,833	£2,269,428	
Wyevale Garden Centre, Hastings	£612,857	£2,131,943	£1,696,631	£956,725	£3,198,255	£1,052,925	£9,649,336	
Others Total	£2,901,250	£9,002,985	£13,772,560	£9,530,373	£19,322,692	£7,641,283	£62,171,143	
Centres/Locations Outside District with Attractio	**£22,625,679**	**£52,629,950**	**£35,063,940**	**£37,311,096**	**£45,505,149**	**£26,980,859**	**£220,116,673**	
* Internet	£3,200,600	£5,034,438	£3,309,136	£3,142,317	£4,110,494	£2,023,328	£20,820,312	
* Catalogue/Mail Order	£2,018,824	£4,479,123	£2,159,870	£2,273,601	£3,678,061	£1,383,150	£15,992,629	
Internet/Mail Order	**£5,219,424**	**£9,513,561**	**£5,469,006**	**£5,415,917**	**£7,788,555**	**£3,406,477**	**£36,812,941**	
	£67,896,667	£126,271,271	£42,823,188	£57,623,501	£70,391,230	£33,887,174	£398,893,031	

TABLE P: Comparison Goods Market Shares 2015 with Morrisons at Beeching Road

	Study Zones						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair	
New Morrisons Beeching Road South	**1.83%**	**1.41%**	**0.17%**	**0.19%**	**0.00%**	**0.00%**	**2.30%**
Bexhill - Town Centre	36.10%	27.70%	0.45%	5.30%	0.96%	2.10%	16.16%
Battle - Town Centre	0.70%	1.60%	0.36%	11.75%	0.00%	1.28%	2.47%
Rye - Town Centre	0.07%	0.00%	0.00%	0.51%	18.55%	0.89%	3.61%
Ravenside Retail Park, Bexhill	18.55%	14.35%	1.13%	4.29%	2.99%	5.84%	9.57%
Tesco, Ravenside Retail Park	1.89%	1.60%	0.15%	0.21%	0.00%	0.00%	0.97%
Sidley - Local Centre	0.35%	1.65%	0.00%	0.09%	0.00%	0.00%	0.60%
Little Common - Local Centre	0.12%	2.90%	0.00%	0.09%	0.00%	0.06%	0.95%
Robertsbridge	0.00%	0.09%	0.34%	3.25%	0.00%	0.00%	0.53%
Peasmarsh	0.00%	0.00%	0.15%	0.09%	0.79%	0.00%	0.18%
Ticehurst	0.00%	0.00%	2.75%	0.00%	0.06%	0.00%	0.31%
Northium	0.00%	0.00%	0.00%	0.00%	0.94%	0.00%	0.17%
Sedlescombe	0.00%	0.00%	0.00%	0.23%	0.00%	0.16%	0.05%
Rother District	**57.78%**	**49.89%**	**5.34%**	**25.82%**	**24.29%**	**10.33%**	**35.55%**
Eastbourne - Town Centre	20.80%	24.38%	2.93%	9.21%	1.67%	5.39%	13.62%
Hastings - Town Centre	7.70%	9.07%	6.98%	27.35%	32.36%	49.67%	18.98%
Tunbridge Wells - Town Centre	0.07%	0.72%	39.70%	11.52%	3.17%	2.01%	6.92%
Ashford - Designer Outlet Village	0.00%	0.03%	0.45%	0.31%	3.87%	1.66%	0.96%
Ashford - Town Centre	0.00%	0.00%	0.00%	0.21%	4.45%	0.37%	0.89%
Bluewater Shopping Centre	0.00%	0.23%	0.22%	0.56%	0.92%	0.44%	0.38%
Brighton - Town Centre	0.31%	0.49%	0.00%	0.60%	0.33%	0.00%	0.35%
Hailsham - Town Centre	0.00%	0.07%	0.25%	0.04%	0.21%	0.33%	0.12%
Heathfield - Town Centre	0.00%	0.04%	8.43%	0.69%	0.33%	0.22%	1.10%
Langney Centre, Eastbourne	0.09%	0.03%	0.00%	0.00%	0.02%	0.00%	0.03%
London	1.37%	0.28%	0.64%	0.50%	1.78%	1.95%	0.96%
Morrisons, Hastings	0.00%	0.17%	0.15%	0.09%	0.00%	0.72%	0.14%
Sainsburys, Hampden Park, Eastbourne	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.04%
Sainsburys, John McAdam Way, St Leonards	0.28%	0.17%	0.30%	3.29%	0.56%	2.50%	0.92%
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.80%	0.00%	0.00%	0.00%	0.09%
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.16%	0.00%	0.03%
Sovereign (Crumbles) Retail Park, Eastbourne	0.02%	0.78%	0.00%	0.00%	0.00%	0.07%	0.25%
St Leonards - Town Centre	0.32%	0.55%	0.43%	1.44%	1.49%	1.76%	0.90%
Tenterden - Town Centre	0.13%	0.00%	0.27%	0.73%	4.18%	0.00%	0.93%
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.40%	0.00%	0.07%
Tesco, Churchwood Drive, St Leonards	0.08%	0.26%	1.16%	0.82%	0.32%	2.63%	0.62%
Tesco, Lottbridge Drove, Ebne	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%	0.04%
Tesco, Tunbridge Wells	0.00%	0.04%	0.15%	0.00%	0.00%	0.00%	0.03%
Other	0.43%	1.61%	5.13%	2.80%	2.03%	3.42%	2.19%
Tunbridge Wells, Longfield Retail Park	0.22%	0.24%	8.58%	2.50%	0.96%	1.07%	1.66%
Tonbridge Town Centre	0.00%	0.00%	0.09%	0.00%	0.00%	0.00%	0.01%
Ore	0.07%	0.14%	1.12%	0.26%	0.91%	2.30%	0.57%
Wyevale Garden Centre, Hastings	0.89%	1.67%	3.96%	1.66%	4.54%	3.11%	2.43%
Others Total	4.22%	7.07%	32.13%	16.52%	27.45%	22.55%	15.71%
Centres/Locations Outside District with Attractio	32.80%	41.24%	81.74%	64.60%	64.65%	79.62%	55.23%
* Internet	4.66%	3.95%	7.72%	5.45%	5.84%	5.97%	5.21%
* Catalogue/Mail Order	2.94%	3.52%	5.04%	3.94%	5.23%	4.08%	4.01%
Internet/Mail Order	7.60%	7.47%	12.76%	9.39%	11.06%	10.05%	9.22%
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	102.30%

	Study Zones							
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	West/Guest/Fair		
Trade Draw	35%	50%	2%	3%	0%	0%	90%	10%
Waitrose, Beeching Road South	**£1,256,725**	**£1,795,321**	**£71,813**	**£107,719**	**£0**	**£0**	***£3,590,642***	**£359,064**
Bexhill - Town Centre	£24,802,118	£35,294,581	£192,517	£3,057,731	£674,483	£712,931	£64,734,361	
Battle - Town Centre	£480,927	£2,038,676	£155,799	£6,778,932	£0	£434,468	£9,888,802	
Rye - Town Centre	£45,694	£0	£0	£293,925	£13,057,752	£300,211	£13,697,583	
Ravenside Retail Park, Bexhill	£12,744,579	£18,284,377	£485,273	£2,474,251	£2,102,965	£1,977,445	£38,068,889	
Tesco, Ravenside Retail Park	£1,298,504	£2,038,676	£64,760	£122,204	£0	£0	£3,524,145	
Sidley - Local Centre	£240,464	£2,102,385	£0	£54,413	£0	£0	£2,397,261	
Little Common - Local Centre	£82,445	£3,695,100	£0	£54,413	£0	£20,147	£3,852,105	
Robertsbridge	£0	£113,329	£146,534	£1,872,339	£0	£0	£2,132,202	
Peasmarsh	£0	£0	£64,760	£54,413	£558,783	£0	£677,956	
Ticehurst	£0	£0	£1,180,598	£0	£45,118	£0	£1,225,716	
Northium	£0	£0	£0	£0	£658,426	£0	£658,426	
Sedlescombe	£0	£0	£0	£133,867	£0	£54,636	£188,503	
Rother District	**£39,694,731**	**£63,567,124**	**£2,290,243**	**£14,896,487**	**£17,097,527**	**£3,499,837**	**£141,045,948**	
Eastbourne - Town Centre	£14,290,417	£31,064,328	£1,256,124	£5,313,956	£1,175,933	£1,824,980	£54,925,738	
Hastings - Town Centre	£5,290,202	£11,562,054	£2,991,257	£15,779,046	£22,775,353	£16,832,365	£75,230,277	
Tunbridge Wells - Town Centre	£50,095	£911,392	£17,018,279	£6,648,878	£2,231,170	£682,230	£27,542,044	
Ashford - Designer Outlet Village	£0	£35,268	£193,777	£181,085	£2,723,827	£562,165	£3,696,122	
Ashford - Town Centre	£0	£0	£0	£121,287	£3,129,409	£124,796	£3,375,492	
Bluewater Shopping Centre	£0	£288,387	£96,198	£325,829	£647,479	£149,623	£1,507,515	
Brighton - Town Centre	£212,937	£628,374	£0	£347,424	£229,433	£0	£1,418,168	
Hailsham - Town Centre	£0	£91,560	£107,529	£21,063	£150,099	£113,199	£483,449	
Heathfield - Town Centre	£0	£55,857	£3,615,356	£398,869	£231,085	£74,783	£4,375,949	
Langney Centre, Eastbourne	£64,952	£35,545	£0	£0	£11,104	£0	£111,601	
London	£941,144	£353,647	£272,555	£287,626	£1,251,945	£659,554	£3,766,470	
Morrisons, Hastings	£0	£210,455	£64,760	£53,047	£0	£242,515	£570,778	
Sainsburys, Hampden Park, Eastbourne	£0	£169,232	£0	£0	£0	£0	£169,232	
Sainsburys, John McAdam Way, St Leonards	£195,457	£217,979	£129,521	£1,899,213	£395,069	£848,257	£3,685,498	
Sainsburys, Linden Park Rd, Tun Wells	£0	£0	£343,076	£0	£0	£0	£343,076	
Sainsburys, Simon Well, Ashford	£0	£0	£0	£0	£110,657	£0	£110,657	
Sovereign (Crumbles) Retail Park, Eastbourne	£13,079	£989,790	£0	£0	£0	£23,662	£1,026,532	
St Leonards - Town Centre	£216,765	£700,855	£182,775	£833,189	£1,049,853	£597,563	£3,581,000	
Tenterden - Town Centre	£91,389	£0	£114,533	£420,656	£2,940,143	£0	£3,566,721	
Tesco, Ashford	£0	£0	£0	£0	£282,467	£0	£282,467	
Tesco, Churchwood Drive, St Leonards	£57,924	£333,063	£496,615	£475,515	£223,215	£891,431	£2,477,762	
Tesco, Lottbridge Drove, Ebne	£0	£182,388	£0	£0	£0	£0	£182,388	
Tesco, Tunbridge Wells	£0	£48,378	£64,760	£0	£0	£0	£113,139	
Other	£294,665	£2,055,370	£2,199,292	£1,617,058	£1,430,538	£1,158,945	£8,755,869	
Tunbridge Wells, Longfield Retail Park	£149,984	£302,283	£3,678,307	£1,443,992	£677,013	£363,032	£6,614,611	
Tonbridge Town Centre	£0	£0	£37,881	£0	£0	£0	£37,881	
Ore	£50,095	£172,611	£478,993	£147,794	£641,102	£778,833	£2,269,428	
Wyevale Garden Centre, Hastings	£612,857	£2,131,943	£1,696,631	£956,725	£3,198,255	£1,052,925	£9,649,336	
Others Total	£2,901,250	£9,002,985	£13,772,560	£9,530,373	£19,322,692	£7,641,283	£62,171,143	
Centres/Locations Outside District with Attractio	**£22,531,964**	**£52,540,758**	**£35,038,220**	**£37,272,253**	**£45,505,149**	**£26,980,859**	**£219,869,203**	
* Internet	£3,200,600	£5,034,438	£3,309,136	£3,142,317	£4,110,494	£2,023,328	£20,820,312	
* Catalogue/Mail Order	£2,018,824	£4,479,123	£2,159,870	£2,273,601	£3,678,061	£1,383,150	£15,992,629	
Internet/Mail Order	**£5,219,424**	**£9,513,561**	**£5,469,006**	**£5,415,917**	**£7,788,555**	**£3,406,477**	**£36,812,941**	
	£67,446,120	£125,621,443	£42,797,468	£57,584,657	£70,391,230	£33,887,174	£397,728,092	

TABLE Q: Analysis/Summary Of Convenience Trade Diversions 2015

	Baseline		Sainsbury On Site Redevelopment				Sainsbury New Store Beeching Road			
	Benchmark Turnover £M	Market Share Pre Impact £M	Trade Diversion Turnover	Difference	% Impact on Pre-Impact Market Share	% Impact on Benchmark	Trade Diversion Turnover	Difference	% Impact on Pre-Impact Market Share	% Impact on Benchmark
Proposal			**£28,475,457**				**£37,831,986**			
Sainsbury, Bexhill, Buckhurst Place	#REF!	£25,069,089	£0	-£25,069,089	-100%	#REF!	£0	-£25,069,089	-100%	#REF!
Somerfield, Bexhill, Devonshire Rd	#REF!	£4,221,814	£4,124,369	-£97,445	-2%	#REF!	£3,849,793	-£372,021	-9%	#REF!
Aldi, Bexhill, London Rd	#REF!	£4,351,773	£4,325,898	-£25,874	-1%	#REF!	£4,170,083	-£181,689	-4%	#REF!
Co-op, Bexhill, Western Rd	#REF!	£2,638,401	£2,631,307	-£7,094	0%	#REF!	£2,561,319	-£77,082	-3%	#REF!
Local Store, Bexhill	#REF!	£3,865,863	£3,684,263	-£181,601	-5%	#REF!	£3,457,369	-£408,494	-11%	#REF!
Bexhill Town Centre	#REF!	£40,146,941	£14,765,837	-£25,381,104	-63%	#REF!	£14,038,565	-£26,108,376	-65%	#REF!
			£43,241,294	**£3,094,353**	**108%**	**#REF!**				
Budgen/Jempson, Battle, Market Square	#REF!	£4,307,751	£4,307,751	£0	0%	#REF!	£4,144,901	-£162,850	-4%	#REF!
Co-op, Battle, High St	#REF!	£509,722	£509,722	£0	0%	#REF!	£509,722	£0	0%	#REF!
Local Store, Battle	#REF!	£385,828	£385,828	£0	0%	#REF!	£385,828	£0	0%	#REF!
Battle Town Centre	#REF!	£5,203,301	£5,203,301	£0	0%	#REF!	£5,040,451	-£162,850	-3%	#REF!
Lidl, Sidley, Ninfield Rd	#REF!	£3,429,318	£3,390,247	-£39,071	-1%	#REF!	£3,320,260	-£109,058	-3%	#REF!
Local Store, Sidley	#REF!	£755,459	£755,459	£0	0%	#REF!	£706,867	-£48,592	-6%	#REF!
Co-op, Sidley, Ninfield Rd	#REF!	£1,546,406	£1,546,406	£0	0%	#REF!	£1,485,085	-£61,321	-4%	#REF!
Sidley District Centre, Bexhill	#REF!	£5,731,183	£5,692,112	-£39,071	-1%	#REF!	£5,512,211	-£218,972	-4%	#REF!
Co-op, Little Common, Cooden Sea Rd	#REF!	£3,478,427	£3,478,427	£0	0%	#REF!	£3,405,644	-£72,783	-2%	#REF!
Local Store, Little Common	#REF!	£1,054,912	£1,054,912	£0	0%	#REF!	£1,029,244	-£25,668	-2%	#REF!
Little Common District Centre, Bexhill	#REF!	£4,533,339	£4,533,339	£0	0%	#REF!	£4,434,888	-£98,451	-2%	#REF!
Tesco, Bexhill, Collington Ave	#REF!	£2,947,717	£2,941,536	-£6,181	0%	#REF!	£2,806,448	-£141,269	-5%	#REF!
Jempson, Peasmarsh, Main St	#REF!	£5,804,080	£5,804,080	£0	0%	#REF!	£5,804,080	£0	0%	#REF!
Tesco, Bexhill, Ravenside	#REF!	£26,728,420	£25,770,008	-£958,411	-4%	#REF!	£21,491,191	-£5,237,229	-20%	#REF!
Tesco Express, Battle, Battle Hill	#REF!	£1,700,593	£1,700,593	£0	0%	#REF!	£1,700,593	£0	0%	#REF!
Out Of Centre Stores In Rother	#REF!	£37,180,810	£36,216,218	-£964,592	-3%	#REF!	£31,802,312	-£5,378,497	-14%	#REF!
Asda, Eastbourne, Crumbles		£4,302,139	£3,820,514	-£481,625	-11%		£2,855,451	-£1,446,688	-34%	
Sainsbury, Hastings, St Leonards, John Macadam Way		£15,095,140	£15,057,715	-£37,425	0%		£14,732,881	-£362,259	-2%	
Morrison, Hastings, Queens Road		£6,184,343	£6,184,343	£0	0%		£6,184,343	£0	0%	
Tesco, Hastings, St Leonards, Churchwood Drive		£8,907,836	£8,907,836	£0	0%		£8,882,198	-£25,638	0%	
Asda, Silverhill, Hastings		£12,365,655	£12,365,655	£0	0%		£12,207,131	-£158,525	-1%	
Large Stores Outside Rother with Significant Influence		£46,855,114	£46,336,064	-£519,050	-1%		£44,862,004	-£1,993,110	-4%	

	Waitrose Beeching Road				Morrisons Beeching Road			
	Trade Diversion Turnover	Difference	% Impact on Pre-Impact Market Share	% Impact on Benchmark	Trade Diversion Turnover	Difference	% Impact on Pre-Impact Market Share	% Impact on Benchmark
Proposal	**£23,278,260**				**£26,331,371**			
Sainsbury, Bexhill, Buckhurst Place	£15,115,809	-£9,953,281	-40%	#REF!	£14,630,556	-£10,438,533	-42%	#REF!
Somerfield, Bexhill, Devonshire Rd	£3,221,741	-£1,000,074	-24%	#REF!	£3,139,354	-£1,082,460	-26%	#REF!
Aldi, Bexhill, London Rd	£4,103,267	-£248,506	-6%	#REF!	£3,883,708	-£468,065	-11%	#REF!
Co-op, Bexhill, Western Rd	£2,337,435	-£300,967	-11%	#REF!	£2,337,435	-£300,967	-11%	#REF!
Local Store, Bexhill	£2,989,749	-£876,114	-23%	#REF!	£2,910,658	-£955,205	-25%	#REF!
Bexhill Town Centre	£27,768,000	-£12,378,941	-31%	#REF!	£26,901,711	-£13,245,230	-33%	#REF!
Budgen/Jempson, Battle, Market Square	£4,426,024	£118,273	3%	#REF!	£4,371,179	£63,428	1%	#REF!
Co-op, Battle, High St	£490,784	-£18,939	-4%	#REF!	£490,784	-£18,939	-4%	#REF!
Local Store, Battle	£385,828	£0	0%	#REF!	£385,828	£0	0%	#REF!
Battle Town Centre	£5,302,635	£99,334	2%	#REF!	£5,247,791	£44,489	1%	#REF!
Lidl, Sidley, Ninfield Rd	£3,429,318	£0	0%	#REF!	£3,311,002	-£118,316	-3%	#REF!
Local Store, Sidley	£715,556	-£39,903	-5%	#REF!	£715,556	-£39,903	-5%	#REF!
Co-op, Sidley, Ninfield Rd	£1,546,406	£0	0%	#REF!	£1,546,406	£0	0%	#REF!
Sidley District Centre, Bexhill	£5,691,280	-£39,903	-1%	#REF!	£5,572,964	-£158,218	-3%	#REF!
Co-op, Little Common, Cooden Sea Rd	£3,478,427	£0	0%	#REF!	£3,478,427	£0	0%	#REF!
Local Store, Little Common	£1,054,912	£0	0%	#REF!	£1,054,912	£0	0%	#REF!
Little Common District Centre, Bexhill	£4,533,339	£0	0%	#REF!	£4,533,339	£0	0%	#REF!
Tesco, Bexhill, Collington Ave	£2,720,650	-£227,066	-8%	#REF!	£2,720,650	-£227,066	-8%	#REF!
Jempson, Peasmarsh, Main St	£5,789,412	-£14,668	0%	#REF!	£5,789,412	-£14,668	0%	#REF!
Tesco, Bexhill, Ravenside	£23,103,999	-£3,624,420	-14%	#REF!	£21,455,694	-£5,272,726	-20%	#REF!
Tesco Express, Battle, Battle Hill	£1,700,593	£0	0%	#REF!	£1,700,593	£0	0%	#REF!
Out Of Centre Stores In Rother	£33,314,655	-£3,866,155	-10%	#REF!	£31,666,350	-£5,514,460	-15%	#REF!
Asda, Eastbourne, Crumbles	£2,654,727	-£1,647,412	-38%		£2,654,727	-£1,647,412	-38%	
Sainsbury, Hastings, St Leonards, John Macadam Way	£14,368,950	-£726,190	-5%		£14,349,188	-£745,951	-5%	
Morrison, Hastings, Queens Road	£6,160,482	-£23,861	0%		£6,160,482	-£23,861	0%	
Tesco, Hastings, St Leonards, Churchwood Drive	£7,860,894	-£1,046,942	-12%		£7,841,132	-£1,066,704	-12%	
Asda, Silverhill, Hastings	£11,203,428	-£1,162,228	-9%		£11,183,666	-£1,181,989	-10%	
Large Stores Outside Rother with Significant Influence	£42,248,481	-£4,606,633	-10%		£42,189,196	-£4,665,917	-10%	

TABLE R: Analysis/Summary of Comparison Trade Diversions 2015

	Baseline	Sainsbury On Site Redevelopment			Sainsbury New Store Beeching Road			Waitrose Beeching Road (South)			Morrisons Beeching Road (South)			
	Market Share Pre Impact	**Trade Diversion Turnover**	**Difference**	**% Impact on Pre-Impact Market Share**	**Trade Diversion Turnover**	**Difference**	**% Impact on Pre-Impact Market Share**	**Trade Diversion Turnover**	**Difference**	**% Impact on Pre-Impact Market Share**	**Trade Diversion Turnover**	**Difference**	**% Impact on Pre-Impact Market Share**	
Proposal Turnover		**£3,890,612**			**£10,056,604**			**£2,302,246**			**£3,590,642**			**Proposal Turnover**
Bexhill - Town Centre	£65,786,019	£64,550,100	-£1,235,919	-1.88%	£62,294,296	-£3,491,723	-5.31%	£65,254,021	-£531,998	-0.81%	£64,734,361	-£1,051,658	-1.60%	Bexhill - Town Centre
Battle - Town Centre	£9,988,508	£9,940,726	-£47,782	-0.48%	£9,892,727	-£95,781	-0.96%	£9,888,802	-£99,706	-1.00%	£9,888,802	-£99,706	-1.00%	Battle - Town Centre
Rye - Town Centre	£13,697,583	£13,697,583	£0	0.00%	£13,697,583	£0	0.00%	£13,697,583	£0	0.00%	£13,697,583	£0	0.00%	Rye - Town Centre
Ravenside Retail Park, Bexhill	£38,797,259	£38,029,541	-£767,717	-1.98%	£37,970,828	-£826,431	-2.13%	£38,235,653	-£561,606	-1.45%	£38,068,889	-£728,370	-1.88%	Ravenside Retail Park, Bexhill
Tesco, Ravenside Retail Park	£3,945,286	£3,467,307	-£477,979	-12.12%	£2,932,661	-£1,012,625	-25.67%	£3,688,911	-£256,374	-6.50%	£3,524,145	-£421,141	-10.67%	Tesco, Ravenside Retail Park
Sidley - Local Centre	£2,479,587	£2,411,002	-£68,585	-2.77%	£2,359,036	-£120,551	-4.86%	£2,428,412	-£51,175	-2.06%	£2,397,261	-£82,325	-3.32%	Sidley - Local Centre
Little Common - Local Centre	£3,939,964	£3,845,234	-£94,729	-2.40%	£3,597,270	-£342,693	-8.70%	£3,887,232	-£52,731	-1.34%	£3,852,105	-£87,859	-2.23%	Little Common - Local Centre
Robertsbridge	£2,132,202	£2,132,202	£0	0.00%	£2,132,202	£0	0.00%	£2,132,202	£0	0.00%	£2,132,202	£0	0.00%	Robertsbridge
Peasmarsh	£677,956	£677,956	£0	0.00%	£677,956	£0	0.00%	£677,956	£0	0.00%	£677,956	£0	0.00%	Peasmarsh
Ticehurst	£1,225,716	£1,225,716	£0	0.00%	£1,225,716	£0	0.00%	£1,225,716	£0	0.00%	£1,225,716	£0	0.00%	Ticehurst
Northium	£658,426	£658,426	£0	0.00%	£658,426	£0	0.00%	£658,426	£0	0.00%	£658,426	£0	0.00%	Northium
Sedlescombe	£188,503	£188,503	£0	0.00%	£188,503	£0	0.00%	£188,503	£0	0.00%	£188,503	£0	0.00%	Sedlescombe
Rother District	£143,517,007	£140,824,295	-£2,692,711	-1.88%	£137,627,203	-£5,889,804	-4.10%	£141,963,417	-£1,553,590	-1.08%	£141,045,948	-£2,471,059	-1.72%	**Rother District**

Appendix D

Health Check Update

Appendix D

1. BEXHILL TOWN CENTRE HEALTH CHECK

1.1 The following section examines the health of Bexhill town centre in accordance with the Town Centre Health Check Indicators set out in Annex D of Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4). This analysis provides an update to the Bexhill Town Centre Health Check included within the Rother District Wide Shopping Assessment, June 2008 (2008 Health Check), and is based upon more up to date information/data, and inspection of the town centre in February 2010.

A1 - Diversity of main town centre uses (by number, type, and amount of floorspace)

1.2 A mix of both national multiple and small independent retailers continue to operate within Bexhill town centre, with key retailers including Sainsbury, Co-Op, Boots the Chemist, Clinton Cards, Holland and Barrett, New Look, M & Co, and WH Smith. The most significant departure of key town centre retailers, since the 2008 Health Check, is Woolworths; this follows the company going into administration in early 2009. An Iceland store now operates from this unit.

1.3 Sainsbury, Somerfield and Co-Op continue to provide the key convenience opportunities within the town centre, supported by Iceland and a range of smaller independent and specialist food retailers including bakers, butchers, grocers, and a fish monger. Furthermore, inspection of the town centre in February 2010 indicates Budgens will occupy a unit on Sea Road.

1.4 The retail composition of Bexhill town centre at February 2010, was as follows:

Bexhill Town Centre Composition by Unit/Floorspace February 2010		
	Units	**%**
Convenience	24	7.34
Comparison	125	38.23
Service	132	40.37
Vacant	46	14.06
Total	**327**	
Source: GL Hearn inspection, February 2010		

1.5 When compared with the 2008 Health Check, Bexhill town centre has experienced an increase in the number of convenience, service and vacant units; and a decrease in the number of comparison units.

1.6 The town centre also continues to comprise offices; leisure, cultural and entertainment facilities; pubs, cafes and restaurants; and hotels.

A2 - The amount of retail, leisure and office floorspace in edge of centre and out of centre locations

1.7 The Bexhill Town Centre Shopping Area is defined within the Rother District Local Plan, adopted in July 2006. This defined area includes the majority of retail, leisure and office floorspace. Only a small number of retail units are located at the edge of the Bexhill Town Centre Shopping Area; these are occupied by service operators, and a convenience (CTN) operator.

A3 - The potential capacity for growth or change of centres in the network

1.8 This was considered in the 2008 District-wide shopping study. Capacity was identified for additional shopping in Bexhill town centre, both convenience and comparison goods retail floorspace. Proposals were also being advanced for improvements and expansion to competing centres including Eastbourne and Hastings.

A4 - Retailer representation and intentions to change representation

1.9 Bexhill town centre continues to maintain its local identity and individuality with a high proportion of local, independent retailers. The most significant movement of national multiple retailers within the town centre is the departure of Woolworths (Devonshire Road), and the introduction of Iceland (Devonshire Road) and Budgens (Sea Road).

1.10 The latest Town Focus Report for Bexhill (March 2010) provides an indication of recent town centre retail requirements. This report indicates the number of retail requirements since the 2008 Health Check has almost halved (reduced from 21 requirements in October 2007 to 12 requirements in April 2009). These rates should be considered in light of the higher than average vacancy rate in the centre, suggesting the interested retailers are not finding units which meet their requirements in Bexhill.

A5 - Shopping rents

1.11 The latest Town Focus Report for Bexhill (March 2010) provides information on recent rental growth for Zone A premises. This database indicates retail rental levels remain unchanged (at £40 per ft^2) since the 2008 Health Check.

A6 - Proportion of vacant street level property and the length of time properties have been vacant

1.12 Our survey of the town centre in February 2010 indicates there were a total of 46 vacant units out of a total 327 units. This gives a vacancy figure of 14.06%, which is higher than the UK average (February 2009) of 11.85%. These vacant units are dispersed throughout the designated Bexhill Town Centre Shopping Area, primarily located on Sackville Road, Western Road, and St Leonards Road.

1.13 Our survey of the town centre also indicates there is a vacant site located within the defined Bexhill Town Centre Shopping Area, on the corner of Jameson Road and Sea Road. This site is in a peripheral location and has an area of approximately 1,250 m^2.

A7 - Commercial yields on non-domestic property (ie the capital value in relation to the expected market rental):

1.14 The most recent yield data on retail property in towns in the UK (published by the Valuation Office in January and July 2008) indicates commercial yields in Bexhill have remained unchanged (9.0%) since the 2008 Health Check. The commercial yields within the nearby centre of Eastbourne has also remained unchanged (6.0%), whilst commercial yields slightly improved (by 0.25%) within Tenterden.

A8 - Land values and the length of time key sites have remained undeveloped

1.15 We have no published data for this indicator.

A9 - Pedestrian flows (footfall)

1.16 There are no apparent changes in pedestrian traffic within Bexhill town centre since the 2008 Health Check. Pedestrian traffic is largely uniform on the centre's three key retailing streets – Western Road, Devonshire Road and St Leonard's Road.

1.17 The railway line remains a barrier to pedestrian movement and clearly separates the two components of the town centre.

A10 - Accessibility

1.18 Bexhill is reasonably well provided for in terms of public transport (both bus and train) options for residents and visitors to the town. There are no significant changes to accessibility since the 2008 Health Check.

A11 - Customer and residents' views and behaviour

1.19 A more recent household survey has not been undertaken as part of this study. The 2008 Health Check indicates:

- Bexhill residents typically undertake their main and top up grocery shopping locally, principally at Tesco, Ravenside Retail Park and Sainsburys, Buckhurst Place, within the town centre;
- The Somerfield store and other local retail stores within Bexhill town centre also play important roles in meeting the top-up or everyday convenience retail needs of local residents;
- There are four 'stand out' locations accessed by residents of Bexhill for comparison goods shopping, those being Hastings, Eastbourne, Bexhill, and Ravenside Retail Park; and
- Local residents like to link their trips to Bexhill town centre with food shopping, banking or post office requirements, browsing, sports and leisure facilities, or visits to local cafes and restaurants.

1.20 The 2008 Health Check also reported some 20% of residents indicated that no changes are necessary to Bexhill town centre, while 36% sought improvements to car parking arrangements and provision, some 26% would like to see a wider range of non-food retailers within the centre, while a further 20% indicated that more national multiples would increase the attraction of the centre.

A12 - Perception of safety and occurrence of crime

1.21 Crime statistics from Rother DC. Generally the town centre feels a safe place to shop and visit. There is visible but not overbearing policing within the town.

A13 - State of the town centre environmental quality

1.22 The environmental quality within the town centre is reasonably high. No significant changes to the environmental quality of the town centre have occurred since the 2008 Health Check.

Conclusions on Health of Town Centre

1.23 The results of the town centre health check indicate no significant changes to Bexhill town centre have occurred since the 2008 Health Check; with the centre remaining generally healthy, vital and viable.

1.24 Changes since the 2008 Health Check include:

- An increase in the number of convenience, service and vacant units;
- A decrease in the number of comparison units;
- Departure of Woolworths, and introduction of Iceland and Budgens; and
- A decrease in the number of retail requirements (from 21 to 12 requirements).
- There has been noticeable increase in the number of antique/second hand/bric a brac stores.

Appendix E

Retail Rental Levels

APPENDIX E

RETAIL ZONE A RENTAL DATA

Year	**Bexhill**	Hastings	Eastbourne	Worthing	Bognor Regis	Folkestone	Dover	Deal	Hove
GCW 2010		**£80.00psf**	**£95.00 psf**	**£95.00 psf**	**£50.00 psf**	**£50.00 psf**	**£45.00 psf**		
2008	**£ 40.00 psf**	£ 110.00 psf	£ 110.00 psf	£ 115.00 psf	£ 60.00 psf	£ 70.00 psf	£ 55.00 psf	£ 55.00 psf	£ 55.00 psf
2007	**£ 40.00 psf**	£ 110.00 psf	£ 110.00 psf	£ 115.00 psf	£ 60.00 psf	£ 70.00 psf	£ 55.00 psf	£ 55.00 psf	£ 55.00 psf
2006	**£ 40.00 psf**	£ 105.00 psf	£ 110.00 psf	£ 115.00 psf	£ 60.00 psf	£ 70.00 psf	£ 55.00 psf	£ 50.00 psf	£ 55.00 psf
2005	**£ 40.00 psf**	£ 95.00 psf	£ 110.00 psf	£ 100.00 psf	£ 60.00 psf	£ 60.00 psf	£ 55.00 psf	£ 50.00 psf	£ 55.00 psf
2004	**£ 35.00 psf**	£ 85.00 psf	£ 100.00 psf	£ 95.00 psf	£ 60.00 psf	£ 60.00 psf	£ 55.00 psf	£ 50.00 psf	£ 55.00 psf
2003	**£ 30.00 psf**	£ 85.00 psf	£ 95.00 psf	£ 95.00 psf	£ 55.00 psf	£ 55.00 psf	£ 55.00 psf	£ 50.00 psf	£ 50.00 psf
2002	**£ 30.00 psf**	£ 85.00 psf	£ 95.00 psf	£ 90.00 psf	£ 55.00 psf	£ 55.00 psf	£ 50.00 psf	£ 45.00 psf	£ 50.00 psf
2001	**£ 35.00 psf**	£ 80.00 psf	£ 90.00 psf	£ 90.00 psf	£ 55.00 psf	£ 50.00 psf	£ 50.00 psf	£ 40.00 psf	£ 50.00 psf
2000	**£ 35.00 psf**	£ 85.00 psf	£ 95.00 psf	£ 90.00 psf	£ 55.00 psf	£ 55.00 psf	£ 55.00 psf	£ 40.00 psf	£ 40.00 psf
1999	**£ 35.00 psf**	£ 85.00 psf	£ 90.00 psf	£ 90.00 psf	£ 55.00 psf	£ 55.00 psf	£ 50.00 psf	£ 30.00 psf	£ 30.00 psf

Sources:
2010 Gooch Cunnliffe Whale in house view on open market Zone A rentals
2008 – 1999 Focus Database – Town Reports