

Rother Shopping Assessment Update Report 2013



August 2013

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Issues &
Options

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A. Bexhill Retail Study Update

1. INTRODUCTION

- 1.1 This Update Report supplements the 'Rother District-wide Shopping Assessment' prepared by GL Hearn, published in June 2008, which provided the main evidence base for retail growth provisions for Bexhill, Battle and Rye in the Council's submitted Local Plan Core Strategy.
- 1.2 It updates the earlier work in two principal respects:
 - a) it takes account of revised expenditure forecasts following the recent recession;
 - b) it relates to the increased level of housing development over the plan period that is now being proposed in the Council.
- 1.3 At the same time, this Report updates the baseline and forecast dates in line with the current Local Plan Strategy period.
- 1.4 The primary purpose of this Update is to determine whether and, if so in what way, the retail policies and provisions in the submitted Strategy should be amended through modifications. It will also inform work on site allocations, as well as any relevant planning applications.
- 1.5 In view of the greater complexity of retail provision at Bexhill, as well as the need to develop the sequential approach, a detailed study has been undertaken by GL Hearn. This 'Bexhill Retail Study Update (August 2013)' is a separate document, forming Appendix 1 to this report. For Battle and Rye, retail turnover capacity, covering both convenience and comparison expenditure, has been provided by GL Hearn, while the assessment of their implications has been undertaken by Council planning officers in liaison with GL Hearn.

2. GENERAL CONTEXT

- 2.1 Since the 2008 'Rother District-wide Shopping Assessment' there has been a number of significant changes in the national planning policy context, including the introduction of the National Planning Policy Framework and the revocation of the South East Plan (Regional Strategy). These have changed over the overall policy context for retail planning. It should also be noted that the Government have commissioned high profile national reviews into Town Centres under the direction of Mary Portas.

National Planning Policy Framework (NPPF) – March 2012

- 2.2 The NPPF makes particular reference to ensuring the vitality of town centres. It recognises that town centres are the heart of communities and policies should be included in Local Plans to support their viability and vitality particularly to promote competitive town centres that provide customer choice. The needs for retail uses should be met in full and should not be limited by site availability. Local Authorities should identify the need for additional retail floorspace and prioritise town centre, then edge of centre sites. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre.
- 2.3 In terms of further considering applications outside of town centres, local planning authorities should require an impact assessment to consider the proposal's impact on existing, committed and planned public and private investment in the centre or centres in the proposals catchment area. Impact assessments should also consider the impact of the proposal on the town centre vitality and viability, up to five years from the time the application is made. Major schemes, where the impact would not be realised within five years should be assessed for up to ten years from the time the application is made.

The Portas Review¹

- 2.4 In 2011, an independent review into the state of high streets and town centres was published by Mary Portas. The report put forward twenty-eight recommendations to Government to revitalise high streets and town centres, including for example, making explicit the presumption in favour of town centre development in the wording of the NPPF. The Review seeks to put High Streets and Town Centres back into the heart of communities, to enable a thriving and accessible to all.
- 2.5 Government accepted, in principle, virtually all of the recommendations set out in the Review² and have made funding available to implement a number of the recommendations. The explicit reference to 'Town Centre first' was also retained within the National Planning Policy Framework when published in March 2012.

¹ http://www.maryportas.com/wp-content/uploads/The_Portas_Review.pdf

² https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/7525/2120019.pdf

3. DEVELOPMENT CONTEXT

- 3.1 The original Assessment (2008), was prepared on the basis of housing growth proposed in the then submitted South East Plan, namely 5,600 net additional homes 2006-2026.
- 3.2 The Council's most recent housing growth proposals, as put forward to Council in July 2013 envisage an increase of at least 5,700 net additional homes over the period 2011-2028. The table below shows how this compares to the earlier South East Plan target. Overall, this represents an 18.5% increase.

	Housing target to meet South East Plan requirement.	Housing growth proposals, as put forward to Council in July 2013
Bexhill	2700	3100
Battle	410-450	475-500
Rye	260-360	355-400
Rural parishes	1270	1670
Hastings Fringes	100	100-250
Total	4810	5700

- 3.3 The actual forecast increase in population is somewhat less, at nearly 8%, as shown below.

Rother population estimates under housing growth scenarios			
	2006	2016	2026
South East Plan	86,700	90,300	92,500
Council proposals (July 2013)	88,221	93,146	99,823
% Increase	1.8	3.2	7.9

- 3.4 In terms of retail development since the original Assessment, there have been a number of significant proposals for new and extended stores come forward and, in some cases, now operational in the District and in adjacent local authority areas. These are set out in the GL Hearn 'Bexhill Retail Study Update'. The main completed developments have been out-of-centre foodstores in Hastings and Eastbourne. Their implications for each of Rother's towns are discussed in Section 4.

4. EXPENDITURE FORECASTS

- 4.1 New expenditure forecasts provided by GL Hearn reflect the substantial changes in retailing from both the wider economic perspective and in terms of changing patterns within the retail market itself. The combined effects of these changes have seen town centres generally facing reduced sales volumes.
- 4.2 This situation is not regarded simply as a “blip” linked to the recent recession. Rather, the growth of internet shopping coupled with new retail models based on flagship stores and smaller satellite stores, which also support internet shopping, suggests that the short and medium term outlook is one of continued weak retail performance. Town centres are expected to turn attention more to services and leisure facilities to maintain their focal roles.
- 4.3 It is notable that the projected growth per annum adopted by GL Hearn in their latest work is now 0.7% for convenience goods and an average of 2.9% for comparison goods, although in the shorter term a lower growth rate is applied.. This compares to 0.8% and 3.5% per annum respectively at the time of the original Assessment.
- 4.4 Turnover for Bexhill, Battle and Rye, based on current housing and expenditure figures, are set out below. Figures for the closest years (2011, 2016, 2021 and 2026) in the 2008 Assessment (Tables 11 and 19) are shown in brackets.

Convenience Capacity

	2013 £M	2018 £M	2023 £M	2028 £M
Bexhill Town Centre				
Benchmark turnover	24.41 (22.45)	24.65 (23.01)	24.90 (23.59)	25.15 (24.19)
Market Share	33.53 (35.74)	33.33 (37.71)	35.59 (39.71)	38.19 (41.91)
Surplus	9.13 (13.30)	8.68 (14.70)	10.69 (16.12)	13.04 (17.72)
Battle Town Centre				
Benchmark turnover	4.54 (4.51)	4.59 (4.63)	4.64 (4.75)	4.68 (4.87)
Market Share	5.57 (5.16)	5.73 (5.45)	6.13 (5.74)	6.59 (6.05)
Surplus	1.02 (0.65)	1.14 (0.82)	1.50 (0.99)	1.91 (1.19)
Rye Town Centre				
Benchmark turnover	8.25 (6.04)	8.33 (6.19)	8.41 (6.34)	8.50 (6.50)
Market Share	5.81 (6.56)	6.99 (6.92)	7.42 (7.29)	7.92 (7.69)
Surplus	-2.44 (0.53)	-1.34 (0.74)	-0.99 (0.95)	-0.58 (1.19)

Comparison Capacity

	2013 £M	2018 £M	2023 £M	2028 £M
Bexhill Town Centre				
Benchmark turnover	57.32 (56.46)	60.99 (60.83)	64.90 (65.53)	69.06 (70.59)
Market Share	46.92 (61.38)	55.31 (73.92)	66.23 (88.85)	79.30 (107.00)
Surplus	-10.4 (4.92)	-5.68 (13.09)	1.34 (23.32)	10.24 (36.41)
Battle Town Centre				
Benchmark turnover	9.87 (9.72)	10.50 (10.47)	11.17 (11.28)	11.89 (12.15)
Market Share	10.50 (11.41)	12.48 (13.74)	14.95 (16.52)	17.90 (19.89)
Surplus	0.63 (1.69)	1.99 (3.27)	3.78 (5.24)	6.01 (7.74)
Rye Town Centre				
Benchmark turnover	20.21 (20.20)	21.50 (21.77)	22.88 (23.45)	24.35 (25.26)
Market Share	11.78 (16.69)	14.00 (20.10)	16.77 (24.15)	20.07 (29.09)
Surplus	-8.43 (-3.52)	-7.50 (-1.67)	-6.11 (0.70)	-4.27 (3.83)

5. ASSESSMENT OF RETAIL NEEDS

Town centre provision

(a) Bexhill

Convenience capacity

- 5.1 A full assessment of the capacity for additional convenience floorspace in Bexhill, and specifically in Bexhill Town Centre, is contained in the separate report by GL Hearn attached as Appendix 1.
- 5.2 Key points from the GL Hearn report are that:
- The benchmark turnover, market share and consequential surplus figures are very similar now as in the original 2008 assessment
 - The forecast trade surplus over the Plan period is now a little less than previously, which may be explained by the new/expanded foodstores in Hastings in particular
 - Bexhill Town Centre's current trade share has fallen from 90% in 2008 to about 80% today, again primarily due to large new stores in adjacent districts
 - Ravenside is expected to continue to perform strongly, boosted by the planned M&S store which is currently under construction.
 - As in the original 2008 assessment, allowance can be made for some (50%) of future increase in market share at Ravenside to be diverted to the town centre. This would still mean that convenience stores at Ravenside would have market shares somewhat above their benchmark turnovers.
- 5.3 GL Hearn presents future floorspace requirements based on both the current town centre market share and increased market shares, returning to 90% as well as a further increase to 95% trade retention. Given that 90% was the prior position with the current scale of convenience floorspace provision then a more ambitious view is that if a suitably attractive (and located) store was available in Bexhill, then the higher level of convenience trade retention could be achieved.
- 5.4 On this basis, it would increase the floorspace requirement for Bexhill town centre to some 2,000sqm over the plan period. Bexhill town centre is considered the most sustainable shopping location, and the sequential approach to identifying sites for new retail floorspace will be used in line with the provisions set out in the NPPF. The identified floorspace requirement for convenience goods capacity would provide the potential to achieve a sufficiently attractive new or expanded foodstore to meet the qualitative need, particularly to serve the west and north of the town, where the majority of new housing is planned to be built.
- 5.5 As regards the timing of additional floorspace, the updated assessment implies that it be related to significant progress on housing development in the town. At

the same time, given the qualitative as well as quantitative need, there may be a case for an earlier development subject to not impacting materially on the town centre and, if possible helping to support its developing role.

Comparison capacity

- 5.6 In terms of comparison goods, the town centre is now expected to see a much lower increase in market share than previously forecast, such that surplus over the Plan period is only about 30% of that previously. The quantitative need over the Plan period identified by GL Hearn is for some 3,862 sqm of net sales comparison floorspace. (See Appendix 1, Table 3). This takes account of the town centre receiving some of the retail growth that would otherwise go to Ravenside Retail Park. It also takes account of the opening of the new M&S store at the Retail Park next year.
- 5.7 This is slightly lower than the 4,000 sqm identified in the submitted Core Strategy. Therefore, there is some evidence to suggest reducing the provision made for additional comparison goods shopping floorspace at Bexhill town centre in the Core Strategy. However on balance this is a slight reduction and not sufficient to warrant a change to the submitted Core Strategy. As with convenience goods floorspace, it may be explained that the bulk of the additional floorspace is required later in the Plan period. Earlier or larger schemes should undertake a full sequential and impact assessment vis-a-vis the town centre.

(b) Battle

Convenience capacity

- 5.8 Forecast turnover market share and resultant trade surplus figures for Battle today are very similar as in 2008, as shown in Section 3. The town centre's market share is somewhat higher now for both main stores (Jempson/Budgen and Co-Op), but the longer term additional potential capacity is still very modest.
- 5.9 However, the forecast growth is based on continuing the existing low market share. The 2008 Assessment gave consideration of increasing this market share in order to support more sustainable shopping patterns. Since then, new/expanded large out-of-centre stores in Hastings will have increased trade leakage; hence, the case for seeking opportunities to claw back trade is if anything strengthened. However as previously recognised, physical capacity constraints limit the ability to sustainably accommodate significant improvements to the current convenience offer. Notwithstanding this, the SHLAA Review 2013 identifies potential for retail-led redevelopment in the town centre.
- 5.10 While the prospects for significantly increasing the proportion of convenience trade retained in the town may be uncertain in practice, the scale of increase currently identified in the Core Strategy is still regarded as a realistic ambition

and should be retained. The deliverability of such additional floorspace will be further assessed in detail through the Development and Site Allocations Plan. However, given the rationale for this additional floorspace, it will be important to make clear that this should not be used as an argument for an out-of-centre store.

Comparison capacity

- 5.11 The assessment in Section 3 identifies a reduction in theoretical surplus expenditure relative to 2008 Assessment, in line with wider economic trends, but still gives rise to some need for further comparison goods floorspace over time. There is limited potential to increase its market share significantly, due mainly to very close proximity to sub-regional shopping centre of Hastings to south-east, as well as regional centre of Tunbridge Wells to north.
- 5.12 Therefore, the original policy position of “*facilitating some additional comparison shopping floorspace*” remains appropriate, as is the expectation will be that this will be limited and achieved through small scale infills and extensions.

(c) Rye

Convenience capacity

- 5.13 The benchmark turnover is higher now, but the market share is about the same, such that no quantitative floorspace need is shown at any point over the plan period. This reflects a low overall level of attraction for convenience expenditure, as was highlighted in the 2008 Assessment, which made a clear case for a new main foodstore on qualitative grounds, essentially clawing back a proportion of trade that is currently lost to other towns. Indeed, this need still exists, with more longer distance trips for food shopping now implied by figures, no doubt largely as a result of new/expanded out-of-centre stores in Hastings.
- 5.14 The 2008 Assessment gave practical consideration of increasing this market share. As for Battle, there is scope to improve on existing very low market share. In fact given that distances from other town centres are greater, there is more scope to retain trade.
- 5.15 The scale of additional convenience floorspace needs to be both practicable in terms of degree of retention and meeting the qualitative need. Previously, the Core Strategy identified 1,650sqm in the first half of the plan period, essentially to reduce leakage as soon as practicable. Since then planning permission has been granted for two schemes in the same location, for 1,727sqm and 1,525sqm net sales of which 1,382sqm and 1,372sqm respectively are for convenience sales. Upon the construction of either of these, it would follow that there would be no need for further floorspace. Therefore it is proposed to retain the existing

provision in Core Strategy to cover the eventuality of neither permission being implemented.

Comparison capacity

- 5.16 Whereas Rye previously had no quantitative need for additional floorspace in the short to medium term, but a small surplus expenditure by the end of the plan period (which translated into a comparison floorspace requirement of some 1,400sqm sales by 2026), there is now forecast to be negative expenditure capacity throughout the plan period.
- 5.17 The prospects of increasing trade draw significantly are limited given proximity of Hastings, Tunbridge Wells and Ashford. At the same time it is recognised that tourism trade makes up a significant proportion of comparison turnover, which boosts potential.
- 5.18 While the town relies heavily on small independent retailers, more national retailer presence could enhance its attractiveness. The previous “clawback target” equivalent to 30% share of home zone expenditure saw potential additional sales floorspace of some 2,000sqm. However, this was qualified by an expectation that it could be absorbed within existing floorspace, by higher trading density.
- 5.19 The Core Strategy makes no specific requirement for additional floorspace. The absence of any expenditure surplus, coupled with scope to increase trade within existing stock, reinforces the earlier position. This would not prevent a suitable scheme being considered against general policies.

Retail impact assessment threshold

- 5.20 The NPPF provides for local planning authorities to set a local threshold for the carrying out of an impact assessment in respect of retail, leisure and office developments not in accordance with an up-to-date plan (paragraph 26). Without a local threshold, the default is 2,500sqm. Guidance on the relevant considerations to take into account in defining such local floorspace/development thresholds is provided in paragraph 7.4 of the Practice Guidance on Need, Impact and the Sequential Approach, published in December 2009.
- 5.21 Having due regard to relevant considerations, such as the scale of town centres; their vitality and viability; the cumulative effects of recent developments and any effects on a town centre strategy, GL Hearn has recommended a threshold of 500sqm gross floor area in respect of retail developments at Bexhill (see Appendix 1 section 5).
- 5.22 This reflects the fact that there have been a number of out-of-centre retail developments approved and that Bexhill town centre is dominated by a large

number of smaller units, as well as the fact that additional needs are relatively low, especially in the early years.

- 5.23 It is considered that a similar threshold would be appropriate for retail developments in both Rye and Battle. They have an identified qualitative need for some 1,000sqm and 1,650sqm convenience floorspace respectively. Developments over 500sqm may potentially impact on meeting these qualitative needs.

6. CONCLUSIONS

6.1 It is concluded that the following modifications should be made to the Core Strategy to reflect the findings of this further analysis:

- i. Amend Policy BX2(iii) to refer to 2,000sqm of additional convenience floorspace.

Also, update the supporting text at paragraph 8.36 accordingly.

- ii. Amend Policy EC7(iv) to refer to retail development proposals in excess of 500sqm, to read:

‘(iv) require retail development proposals in excess of 500sqm to undertake a retail impact assessment’

Add a new supporting paragraph to identify the relevant requirement and considerations in paragraph 26 of the NPPF.

6.2 There is no need to amend the retail floorspace provisions for Battle and Rye, as set out in the submitted Core Strategy.

6.3 It should also be noted that the floorspace figures within the Policies contained within the Local Plan Strategy relates to net sales area. This clarification will be included within the minor modifications to the Core Strategy. The threshold for requiring a retail impact assessment for new retail proposals relates to the Gross External Area (GEA) of the scheme.

Bexhill Retail Study Update

Rother District Council

August 2013

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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 has been signed by the Originators and approved by a Business or Associate Director.

DATE

August 2013

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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 have been appointed by Rother District Council ('the Council') to provide advice to inform the Council's emerging Development and Site Allocations Plan ('the Plan') which will form a part of the Local Plan. The overarching Local Plan Strategy, which is at its advanced stages of preparation, sets out the principle of focusing development in the District towards Bexhill. A copy of the Council's brief is provided at **Appendix A**.
- 1.2 This advice relates specifically to ensuring there is an up-to-date and robust evidence base in place to underpin any new retail allocations to meet the future retailing needs of Bexhill. It represents a partial update, focusing on Bexhill and using the previous household survey, to the District Wide Shopping Assessment undertaken by GL Hearn for the Council in June 2008.
- 1.3 To respond to the brief, this report is structured as follows:
- **Section 2** summarises the conclusions of the previous evidence base and provides an update on the retail context informing this report.
 - **Section 3** provides updated capacity analysis, focusing specifically on Bexhill, for the plan period up to 2028
 - **Section 4** provides sequential analysis of potential sites in and around Bexhill town centre
 - **Section 5** draws together the conclusions of Sections 2 and 3 to provide a set of principles for accommodating identified retail need in Bexhill over the plan period.

2 RETAIL CONTEXT

2.1 With regard to Bexhill, the District Wide Shopping Assessment (DWSA 2008) set out the following conclusions:

- Bexhill, as the largest town centre in the District, provided the widest range of convenience and comparison shopping provision which exerted a reasonable degree of attraction across the District;
- The town centre was considered to be vital and viable but would benefit from qualitative improvements to both convenience and comparison shopping provision;
- Assuming constant market share, there was an identified quantitative need in convenience terms for a new large foodstore or extension to an existing foodstore in the town centre. Short-term comparison need, rising across the plan period, was also identified;
- Whilst the centre retains a good proportion of convenience spend, it was confirmed that there was substantial comparison goods expenditure leaking to out-of-centre destinations (primarily Ravenside Retail Park) and other centres outside the District such as Hastings and Eastbourne;
- There was considered to be qualitative merit in planning for an increase in Bexhill's convenience and comparison market share i.e. planning to accommodate capacity in excess of that identified in quantitative need terms.

2.2 In the intervening five years, there have been a number of changes to the retail context both at a national and local level. These relate primarily to:

- Updated planning policy context;
- New store openings and commitments;
- Depressed economic climate and constrained spending growth.

Planning policy context

2.3 The Council are in the advanced stages of preparing the Core Strategy, with the Examination hearing sessions held in November 2012. Following advice from the Inspector, further work has been carried out to determine the 'Objectively Assessed Needs' for housing within the District. As a consequence of this additional work, revised housing targets of at least 5,700 dwellings (2011-2028) across the District have been put forward by the Council to significantly boost housing supply. These targets will be subject to a forthcoming public consultation over the summer. Equivalent housing targets for Bexhill specifically seek at least 3,100 dwellings over the plan period.

2.4 With reference to Bexhill, the draft Core Strategy sets out a number of policies which relate to Bexhill and, in retail terms, are summarised as follows:

- Strengthening of Bexhill town centre's role in both commercial and cultural terms (Policy BX1 vi)
- Promotion of a co-ordinated town centre initiative to improve Bexhill's use for shopping, services and leisure through various investment measures (Policy BX2 i)
- Providing 2,500 sqm additional convenience goods and 4,000 sqm comparison goods floorspace primarily through edge-of-centre expansion on the north side of the railway line and effective town centre management (Policy BX2 iii)

- Supporting the District's town centres (including Bexhill) in maintaining and increasing the proportion of retail spend available within their catchments in a manner consistent with the hierarchy of centres and sustainably resolving leakage (Policy EC7 i)
- Adhering to the sequential approach in accommodating identified retail needs (Policy EC7 iii)
- At a development control level, requiring applications that may result in impact on town centres to undertake an impact assessment (Policy EC7 iv)

New stores and commitments

- 2.5 As set out in **Appendix B** (Table 1), a number of new proposals have been granted planning permission or constructed since the household survey was undertaken in 2007. Although the trading patterns of a number of the constructed stores have yet to reach maturity, allowance has been made for the impact of these stores using professional judgements, having regard to submitted retail assessments where available, to manually adjust market shares.
- 2.6 With regard to the specific proposals within the District, the following points are noted:
- Marks & Spencer, Ravenside Retail Park, Bexhill (3,121 sqm net sales): this is currently under construction and it is expected to be trading by Christmas 2013. In modelling in the anticipated trade draw of the store, regard has been had to the applicant's retail assessment and the GL Hearn critique of the assessment.
 - Jempsons/Budgens extension, Rye (595 sqm net sales): the store is in-centre so no information was included in the assessment in terms of convenience or comparison split, or anticipated trade draw. It is assumed that the impact of the extension will be limited to Rye stores.
 - Sainsbury's/Tesco, Ferry Road, Rye (1,727 sqm/1,525 sqm net sales): planning permission was granted for the former in 2013, whilst the latter permission has not been issued as the S106 has yet to be completed. Both schemes are for the same site, thus there is no prospect of both coming forward. Given the greater weight arising from the Sainsbury's planning permission, as opposed to the Tesco resolution to grant, it is assumed that only the former will be implemented and regard has therefore been had to that applicant's retail assessment in modelling trade draw.
 - Jempsons/Budgens extension, Peasmarch (1,670 sqm net sales): the store is located outside the town centre. The relatively rural catchment of the existing store and the limited role Bexhill plays in the Peasmarch home zone, it is assumed that there will be no discernible impact on the Bexhill stores, either in- or out-of-centre.
- 2.7 Outside the District but influencing shopping patterns within the District, the following schemes are of note:
- Asda Silverhill, Hastings (3,570 sqm net sales) opened in November 2010. Adjustments to trade draw have been made in line with the applicant's retail assessment.
 - Morrisons, Hampden Park, Eastbourne (3,473 sqm net sales) opened in December 2012. Having regard to the applicant's retail assessment, it is expected that the majority of impacts arising will be felt by stores in Eastbourne and impact on stores within the District will therefore be limited. No adjustment is therefore made to the Bexhill stores.
 - Sovereign Harbour Retail Park, Eastbourne (3,544 sqm net sales): permission was granted in April 2012 for redevelopment of part of the existing retail park for retail and leisure space. This included the flexibility to provide an element of convenience goods floorspace (up to 975 sqm net); however, the majority will be comparison goods floorspace. For the purposes of this review,

it is assumed that any convenience impact will be focused primarily on the existing Asda store and will not impact on Bexhill.

- Tesco, Churchwood Drive, Hastings (redevelopment): at the time of the household survey, the store was trading out of a smaller, temporary unit. The redevelopment for an enlarged store (increasing from the previous store of 5,591 sqm net to 7,512 sqm net) was completed in 2008. This increase in retail floor area relates primarily to comparison goods (1,585 sqm net). Adjustments have been made to market share to reflect the likely underrepresentation in the survey due to the temporary store and the greater attraction of the store following redevelopment.

Retail Context

2.8 The retail market is inherently dynamic. Since the DWAS 2008 was undertaken there have been substantial changes in retailing arising from both the wider economic situation and innovation in the retail market itself. Research undertaken by Verdict (UK Town Centre Retailing 2012) provides the following key points:

- Town centres will remain the worst performing retailing channel for fifth year running and are not anticipated to return to growth until 2014. Factors behind the struggles of the town centre include the strong growth of online mainly in areas where the town centre has been historically strong like music and video and clothing.
- Higher levels of inflation do little to support town centres as volumes fall sharply; higher transport and raw materials costs have filtered through into prices. Sales volumes have fallen as customers cut back on discretionary spending while retailers aim to improve their margins by reviewing their store portfolios to cut out any underperforming space and lower their property bills.
- New retail models are emerging based around larger flagship stores, smaller satellite stores and online sales. As retailers cut back on space and online becomes a more important channel, retailers are moving towards opening larger flagship stores in strategic locations which will house the retailer's full range supported by smaller satellite stores with a more select offer and including internet kiosks allowing access to their full ranges and transactional websites. This model is already being trailed by retailers such as Debenhams and House of Fraser. Advantages to this new model include lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.
- Sales growth in the town centre channel will remain weak due to the internet continuing to take a share and the pent-up demand for furniture & floorcoverings and electricals will tend to support out-of-town formats rather than the town centres, although both locations will be hit by online competition.
- While the development pipeline appears robust, little is currently under construction. Of the 3m square feet of space in the pipeline expected to open in 2013, only a fifth is currently under construction. No space which is set to open after this is currently under construction with the majority still in the proposal stage. Developers are cautious mainly due to retailers reviewing their store portfolios and developers are resubmitting smaller plans for approval.
- Role of town centre will change. While the town centre has been the main shopping channel for the last 30 or so years, its role is set to change dramatically over the next 10 years. Town centres will be used more for leisure activities with more bars, restaurants, food-to-go outlets and community spaces opening in vacant units. Town centres will be used more to support the e-retail channel with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. It is possible that secondary and tertiary space will become obsolete for retailing purposes due to low footfall and has the potential to be converted to other uses including residential.

- While larger centres have grown, they have done so at the expense of smaller towns in the surrounding areas. These smaller towns have been greatly impacted by the pull from the larger surrounding shopping destinations, leading to higher vacancy rates and weaker performing centres. Councils need to make their town centres unique by tailoring offers more towards the local catchment and to encourage residents to shop more locally.
- Smaller town centres will primarily be supported by food and grocery retailing as the sector with the greatest uplift in sales. The main factor behind this performance has been the rapid expansion of space by the grocers, with Tesco and Co-op leading the way, and other grocers such as Sainsbury's and Morrisons set to take advantage and expand their smaller convenience store offer. One consequence is that independents will continue to fall out of the market.

2.9 Since the Verdict report was published, it is noted that even within the convenience sector, Tesco have been high profile in refocusing their stores portfolio away from large stores with a significant non-food component towards smaller stores, dominated by food and grocery offer, in conjunction with recent acquisitions such as Harris + Hoole coffee shops, Euphorium artisan bakery and the Giraffe family restaurant chain being made to diversify their leisure offer and fill space in their largest stores.

2.10 As such, it is clear that the retail market is increasingly competitive. Town centres are not just competing with out-of-centre retail floorspace but also the internet, which is often more pronounced in rural areas with more limited access to the range and choice of goods available in larger town centres. However, the gains made by the internet, particularly on comparison goods shopping have primarily been through the cannibalisation of other non-retail shopping such as mail order, catalogue and TV/advertorial sales and also download media. The costs for retailers attached to home delivery, the inconvenience of missed deliveries for consumers and the option of click-and-collect from stores does suggest that there is still opportunity for physical retail floorspace and town centres. Whilst the internet is a competitive force, in considering the scope for comparison goods shopping allowance has not been made for the market share of special forms of trading (SFT) which includes the internet to increase. This approach recognises it is not appropriate to seek to protect internet spending growth over spending available to physical floorspace rather it can be competed for.

2.11 In the case of convenience goods, allowance is made for a low level of growth in the SFT channel, recognising that internet based sales are currently low and that the main grocers are investing significantly in online sales fulfilment through non-retail floorspace such as distribution centres and 'dark stores'¹.

¹ Dedicated stores to service internet orders that are not open to the public

3 RETAIL CAPACITY ASSESSMENT

3.1 The first part of this section focuses on quantitative retail capacity. This first section, underpinned by the retail capacity calculations at **Appendix 2**, sets out the quantitative need for additional floorspace in Bexhill over the plan period to 2028.

3.2 The second section then provides a qualitative need overview, focusing on updating the analysis provided in DWSA 2008. The conclusions of this section then draw together the quantitative and qualitative need issues identified for the purposes of allocating need over the plan period to 2028.

Quantitative capacity

3.3 As with the DWSA 2008, when considering quantitative need over the long-term period, caution is recommended. As such, whilst the capacity identified in the period to 2018 is considered robust, it is considered that the estimations of need in 2023 and 2028 should be regarded as a broad indication. It is recommended that the evidence is updated at an appropriate time in accordance with best practice.

3.4 The capacity calculations are informed by the following data inputs:

- **Study Area and Zones:** the same study area and zones used in the DWSA 2008 are adopted in this report.
- **Population:** revised ONS based estimates have been used in the base year (2011); population forecasts have been obtained from the Council based on the latest draft Core Strategy policy².
- **Consumer spending estimates:** expenditure estimates have been derived from Experian Retail Planner based on the study area zones. These expenditure estimates have been allowed to grow in accordance with Experian Retail Planner Briefing Note 10.1 (Table 1a).
- **Shopping patterns:** market share information has been derived from the 2007 household survey. Manual adjustments have been made to reflect the influence of new stores and retail commitments detailed in Section 2.
- **Special forms of trading (SFT):** SFT market share information has been derived from the 2007 household survey. For convenience goods retailing allowance is made for the internet to achieve a small increase in market share. Given that all of the main UK grocery retailers now have or will soon have on-line shopping platforms and these internet sales are increasingly now fulfilled by warehousing and distribution space or 'dark stores' rather than from their grocery store portfolio we consider this approach is justified. For comparison goods based internet sales, there has been a market perception that the growth of internet retailing would be open ended. However, the gains made by internet sales of comparison goods have primarily been at the expense of other non-store trading formats e.g. mail order and TV shopping and through media downloads. The ability of the internet to grow further is now dependent upon taking market share away from physical retail floorspace. Given the NPPF's drive to ensuring competitive

² A second scenario (Scenario A) which plans for higher growth (the baseline population plus 10%) across the plan period has also been modelled. The quantitative capacity tables are provided at **Appendix C**. These tables are structured in the same format **Appendix B** (baseline scenario) but are not described in detail in the text given the limited difference in quantitative results. A final summary page includes summary tables which reflect those included in the main report for the baseline growth scenario; these tables are numbered in the same way as the body of the main report; the omission of a Table 5 is therefore intentional as this relates to retailer requirements, rather than quantitative or qualitative capacity.

town centre and recent appeal decisions³, we do not consider it is not appropriate to seek to protect internet spending growth over spending available to support physical floorspace. The adoption of a constant rate does not assume there would be no increase in SFT spending in the future; rather it allows SFT to increase in the same proportion as comparison spending as a whole.

- **Company average sales densities:** to calculate benchmark turnovers for retail facilities in the District, where available, Verdict 2012 company average sales densities have been applied.
- **Sales efficiencies:** applied at 0.2% per annum for convenience goods and 1.25% per annum for comparison goods.
- **Expenditure inflow:** allowance has been made for comparison goods expenditure inflows to Bexhill and Ravenside Retail Park (15% and 40% respectively) arising from tourist/visitor spend and inflow spend from Hastings (outwith the original household survey area). Hastings Borough Council's retail evidence base has informed these figures and they are in line with the assumptions adopted for the DWSA 2008.

3.5 The capacity methodology adopted is broadly consistent with that used in the DWSA 2008. In summary:

- Market share information is used to generate implied turnovers for each centre/store. It should be noted that, as set out above, allowances have been made for commitments and new stores by using professional judgements to manually adjust market shares derived from the 2007 household survey.
- Benchmark turnovers are based on published sales densities, together with professional judgement in terms of sales mix and for local retailers.
- Implied turnovers are compared to benchmark turnovers. In calculating quantitative capacity, a surplus of consumer expenditure over benchmark level suggests need for additional floorspace. Conversely, a deficit implies that there is an overprovision in retail floorspace and points to there being no quantitative need.

Convenience capacity

3.6 Tables 1 to 5 and 9 to 12 in **Appendix B** relate to convenience shopping.

3.7 Capacity is shown in Table 11 (**Appendix B**) and is summarised below.

Table 1: Convenience capacity summary

Year	Capacity	
	£M	Sqm net
2013	£9.13	733
2018	£8.68	690
2023	£10.69	841
2028	£13.04	1,016

³ Appeal, Sainsbury Darlington (APP/N1350/A/10/2138408) ref paragraphs 41 and 42 which advise that, in terms of comparison expenditure, the household survey should be used as a basis for SFT 'but that going forward, this type of spending can be competed for and it should not simply be protected'.

- 3.8 This points to limited capacity over the plan period and represents a reduction from the level identified in the DWSA 2008. This can be attributed to a number of factors:
- Impact of new stores, together with the anticipated impact of commitments as detailed in Section 2, on the performance of existing stores which has reduced overtrading and therefore the theoretical surplus;
 - Higher benchmark trading densities (Verdict 2012) for the major retailers which has reduced overtrading;
 - Reduced expenditure growth rates and the increased role of the internet in meeting convenience shopping needs.
- 3.9 Although it is noted that within Bexhill, the Sainsbury's store at Buckhurst Place appears to be trading strongly, it should also be noted that the other convenience shopping opportunities in the town centre which would typically provide a top-up shopping function are not meeting benchmark levels of trade. Such an outcome is often a consequence of household surveys typically underrepresenting the role of top-up shopping. As such, whilst the strong quantitative performance of the Sainsbury's store is apparent, it should be borne in mind that a proportion of this expenditure may be flowing to other stores inside the town centre. The qualitative analysis of the store's performance will consider this point in further detail.
- 3.10 In addition, it should be noted that the out-of-centre Aldi store was recorded as significantly undertrading; it is likely that it now performs at a higher level. This in part reflects the greater importance of limited assortment discounters in everyday convenience shopping patterns as a consequence of the current economic downturn which has reduced expenditure growth forecasts and household disposable incomes, bringing about a downshift in shopping habits. Whilst no adjustment has been made for this in the tables at Appendix 2, it is considered that there will have been a degree of trade diversion from the in-centre Sainsbury's store which will have reduced the level of overtrading.
- 3.11 At Ravenside Retail Park (anticipated to be open late this year and to have matured by 2016), convenience capacity will be reduced by the opening of the new M&S store. Whilst it is acknowledged that M&S is focused at a distinct end of the convenience shopping market, it should also be borne in mind that Tesco is one of the few supermarkets which seeks to cater to all sections of the convenience market such that an element of its food offer will still compete readily with M&S.
- 3.12 The comparison capacity analysis (at paragraph 3.14 onwards) considers options for the diverting expenditure growth from Ravenside Retail Park to the town centre. This exercise is not deemed appropriate in convenience terms; this is primarily because of the nature of the change that will take place in the convenience shopping at Ravenside as a consequence of the new M&S. It is considered that the food hall element of the M&S will absorb some of the overtrading at the existing

Tesco store, particularly within the higher end shoppers. As such, the degree to which expenditure growth could reasonably be diverted to the town centre is very limited.

- 3.13 However, an alternative scenario has been modelled which considers the impact of commitments outside the core Bexhill zones and how these have affected convenience expenditure retention. This option for increased market share is explored in the forthcoming qualitative analysis.

Comparison capacity

- 3.14 Tables 1 to 3, 6 to 8 and 13 to 16 in **Appendix B** relate to comparison goods shopping.
- 3.15 Capacity is shown in Table 15 (**Appendix B**) and is summarised below. As with the convenience capacity summary set out above, the identified surplus combines both in-centre and out-of-centre destinations to generate a single capacity figure for Bexhill:

Table 2: Comparison capacity summary: Bexhill

Year	Bexhill	
	£M	Sqm net
2013	-£13.79	-3,656
2018	-£8.04	-2,005
2023	£6.48	1,518
2028	£24.85	5,470

- 3.16 In the early part of the plan period (to 2018), there is no capacity. Because the committed M&S at Ravenside Retail Park is only expected to be trading at the very end of 2013, this results in a theoretical capacity deficit in 2018. In the later part of the plan period, capacity starts to emerge. However, as set out earlier, caution should be exercised in planning to accommodate this growth given the long-term nature of the forecast.
- 3.17 As with convenience goods capacity, these represent reduced levels from those identified in the DWSA 2008, for a number of key reasons:
- Again, the role of commitments in diverting expenditure which would otherwise have been identified as capacity. This is apparent when the reduction in capacity is shown between 2013 and 2018 when the M&S commitment is expected to commence trading;
 - As with convenience goods, there has been a reduction in growth rates which is more pronounced in the comparison sector, serving to curtail the population's expenditure growth across the plan period.
- 3.18 Within the overall capacity figures, it is noted that Bexhill town centre is underperforming against what would be considered to be benchmark levels in the early part of the plan period, suggesting that even before the impact of the new M&S store at Ravenside Retail Park is factored in, the town centre was marginally underperforming.

- 3.19 Once the impact of M&S on the town centre is taken into account from the very end of 2013 onwards, there is no immediate capacity in 2018 and relatively limited capacity is identified by 2023. Furthermore, this capacity is arising in both in-centre and out-of-centre locations; the Council should be careful to direct this theoretical capacity into the town centre in accordance with the sequential approach to site selection.
- 3.20 In order to plan for this, Table 3 includes a second capacity figure for the town centre.

Table 3: Comparison capacity summary: Bexhill town centre

Year	Town Centre	
	£M	Sqm net
2013	-£12.09	-3,207
2018	-£6.86	-1,711
2023	£3.91	915
2028	£17.55	3,862

- 3.21 It is not considered realistic that 100% of the capacity arising at Ravenside Retail Park would be diverted to the town centre. Table 3 therefore assumes that 50% of capacity arising at Ravenside Retail Park could be redirected to the town centre. This allows for existing stores on the retail park to absorb the remaining proportion of theoretical capacity and trade more intensively, which by their very nature as modern, large-format floorspace units are capable of doing.

Service retail

- 3.22 The preceding two sections have dealt with quantitative convenience and comparison capacity. This section focuses on service retail i.e. main town centre uses falling into Use Classes A1 (but not convenience or comparison retail floorspace), A2, A3, A4, A5 and other uses commonly found in town centres such as offices and D-Class uses.
- 3.23 As set out in the DWSA, unlike retail floorspace, the methodology for identifying capacity for additional service trade is not well-established. The DWSA therefore sought to identify service need as a proportion of combined retail need within each of the main town centres, based on the existing proportion of service trades in those centres (Bexhill 28%).
- 3.24 The table below combines the convenience and comparison capacity set out in Tables 1 and 2 over the plan period to provide an updated position on service trade capacity:

Table 4: Service trade capacity summary

	2013	2018	2023	2028
Convenience				
Net	733	690	841	1,016
Gross (@ 70%)	977	920	1,121	1,355
Comparison				
Net	-3,207	-2,005	915	3,862
Gross (@ 75%)	-4,276	-2,673	1,220	5,149
Total Retail				
Net	-2,230	-1,315	1,729	4,878
Gross	-3,299	-1,753	2,341	6,504
Service trade (gross)	-	-	655 sqm	1,821 sqm

3.25 Again, having regard to the reliability of longer-term growth forecasting, planning for growth to accommodate additional service uses in the latter part of the plan period should be treated with caution.

Qualitative capacity

3.26 Although the main focus of this report has been to look at quantitative capacity, this cannot be considered in isolation.

3.27 The key characteristics of the centre that were identified in the DWAS 2008 remain prevalent and are summarised as follows:

- High proportion of independent and specialist retailers located in the large number of smaller units in Bexhill;
- Limited national multiple retailer representation which is considered low for a centre the size of Bexhill;
- In spite of the presence of quality independents, these do not typically act as key attractors/trip motivators and the presence of a better range and depth of national multiples in Eastbourne and Hastings mean that trade is lost to these centres;
- The Sainsbury's foodstore at Buckhurst Place, despite being dated and undersized, is the key convenience attractor in Bexhill. The two Co-ops and other stores cater primarily to top-up shopping needs;
- Overall, the convenience offer in the town centre, particularly when considered in the context of out-of-centre provision, was deemed to be qualitatively deficient leading to the conclusion, in conjunction with the quantitative need, suggest that there was a need for additional convenience shopping provision in the form of a modern superstore in Bexhill

3.28 In the intervening period, there has been no significant retail investment in Bexhill town centre; and there has been further private sector investment that is anticipated to take place in the out-of-centre shopping offer at Ravenside Retail Park; however, both balanced against this and in part as a consequence of it, the identified quantitative need for additional retail floorspace has diminished.

- 3.29 Bexhill town centre plays a subordinate role, both in convenience and comparison terms, to Hastings and Eastbourne. Furthermore the attraction of Ravenside Retail Park and its convenient and free surface car parking is set to increase when the new M&S is completed. Whilst Bexhill performs a strong service role, the historic fabric of much of the town centre has resulted in a limited number of large-floorplate retail units that national multiples typically seek to occupy. Indeed, within the town centre itself, there are only six retail units in excess of 500 sqm (gross), and of those units, only two are larger than 1,000 sqm (gross); furthermore, it is precisely the constraints imposed by the town centre's heritage that means that scope for creating such floorspace is limited.
- 3.30 In qualitative terms, as well as having regard to what is and is not on the ground in terms of retailers, it is also relevant to consider market factors and the willingness of retailers to consider Bexhill as a suitable location to invest. In terms of market demand in Bexhill from retailers, two well-known property market databases have been used: Focus Costar and EGi. It is noted that Focus Costar have two stated requirements, whereas EGi records approximately 30⁴. These have been considered in some detail and the following table provides a summary of the more realistic requirements, together with some commentary where appropriate.

Table 5: Retail requirements in Bexhill

Retailer	Size (sqm gross)	Requirement date	Comments
Matalan	3,250 – 3,720	2011	Noted to be looking at Bexhill or Hastings (out of town only)
Card Factory	90 – 230	2013	Target for 50 new stores this year in c. 110 towns
B&M Bargains	930 – 2,790	June 2001	Historic requirement. No stores within 25 miles of Bexhill.
Brighthouse	210 – 325	September 2001	Historic requirement. No stores recorded in East Sussex despite stated requirement for representation.
Charlotte Reid (clothing)	75 – 110	March 2011	Vacant units within the town centre could accommodate this
Countrywide (variety)	930 – 1,395	March 2008	
Direct Express Cards	140 - 280	August 2009	Temporary leases sought
Farmfoods	560 – 745	March 2001	Historic requirement but no stores nearby
Foot Solutions	90 - 280	October 2009	Vacant units within the town centre could accommodate this
Monsoon Accessorize	140 - 465	March 2010	Representation in Eastbourne (full store) and Hastings (Accessorize

⁴ These property market retailer requirement databases should be viewed with some caution as they record non-specific retailer requirements.

Retailer	Size (sqm gross)	Requirement date	Comments
			only)
One Stop	185 - 280	August 2001	Historic requirement
River Island	650 – 1,395	November 2001	Historic requirement. Representation in Eastbourne and Hastings
Select (clothing)	230 - 325	April 2003	Historic requirement. Representation in Eastbourne
Soccer Scene	110 – 185	May 2012	Recent requirement
Superdrug	280 - 420	February 2001	Historic requirement
Timberland	90 - 185	September 2003	Located in key retail centres or factory outlet stores only
Toys UK	50	October 2012	Recent requirement
Waitrose	1,395 – 3,995	October 2001	Requirement may now be smaller - new smaller format 'Little Waitrose'

- 3.31 Accordingly, published market demand in Bexhill is both relatively limited and can be seen to include a number of 'blanket' requirements relating to the south east more generally. It however acknowledged that not all retailers publish requirements in this way and more detailed market testing may indicate further demand. That said, it is evident that Bexhill town centre has limited attraction for retailers and whilst demand is identified, it is clearly not substantial.
- 3.32 Whilst more limited quantitative need does not necessarily preclude retail development in excess of the identified capacity, a consequence of quantitative overprovision can be to amplify impact on existing town centre facilities. This is particularly relevant in the case of Bexhill where the DWAS 2008 and, as set out earlier, the draft Core Strategy policy envisages edge-of-centre retail expansion.
- 3.33 That said, it is noted that as a consequence of commitments elsewhere in Rother and outside the District, the amount of convenience expenditure retained in the Bexhill home zones (Bexhill East and Bexhill West) has decreased from the 2008 level of 90% quoted in the DWSA to 80% in 2013. Table 12 (**Appendix B**) sets out what returning to this level of retention would equate to in capacity terms for the town centre and is summarised below:

Table 6: Increased convenience expenditure retention

	2013	2018	2023	2028
Bexhill home zones market share	80%	82%	82%	82%
Option 1: 90% retention				
Increase in home zone market share	10%	8%	8%	8%
Additional capacity	£9.24m 724 sqm	£8.05m 640 sqm	£8.48m 668 sqm	£8.99m 701 sqm
Overall capacity assuming uplift in market share (Table 1)	1,457 sqm	1,330 sqm	1,509 sqm	1,717 sqm
Option 2: 95% retention				
Increase in home zone market share	15%	13%	13%	13%
Additional capacity	£13.77m 1,106 sqm	£12.80m 1,018 sqm	£13.55m 1,066 sqm	£14.42 1,124 sqm
Overall capacity assuming uplift in market share (Table 1)	1,839 sqm	1,708 sqm	1,907 sqm	2,140 sqm

- 3.34 Table 6 above models two scenarios envisaging an uplift in convenience retention in the Bexhill home zones: Option 1 at 90% and Option 2 at 95%.
- 3.35 Option 1 would represent returning to the level of retention at the time of original household survey and upon which the DWSA was based. However, given the nature of changes in shopping provision beyond Bexhill have been quite significant but have yet to fully manifest in terms of mature trading patterns, it cannot necessarily be assumed that new retail development in Bexhill would achieve this objective of increased market share.
- 3.36 The ability to secure an uplift in market share will be influenced by a number of factors that can only be fully assessed at the application stage. The key factors are the scale and quality of the retail offer proposed, applying the established principle of 'like competing with like' and considering how new convenience floorspace might compete with the existing offer. Differentiation in offer, either in terms of range or quality, will be needed to bring about a sustainable shift in shopping patterns to increase clawback and guard against dilution of the existing convenience expenditure going to Bexhill. Other factors to consider include matters such as: car parking and the ability of shoppers to park easily and cheaply; and the specific location's actual or perceived accessibility to shoppers. The Council will need to consider these matters carefully in the event an application is received.
- 3.37 Option 2 envisages a scenario that is higher than the previous level of retention in Bexhill. As such, and given the reservations expressed above with regard to the 90% option, whilst Option 2 clearly points to further potential capacity in Bexhill, this must be balanced against what can be considered realistic in terms of shopping patterns. Although it is clearly desirable in sustainability terms, as well

as in terms of the health of the town centre, to focus expenditure in Bexhill and to seek to minimise leakage, shopping catchments are not sealed; there is inevitable overlap as people fit shopping into their daily lives, linking trips with work and other travel patterns. As such, and given the competing convenience offer outside Bexhill, it is considered that such a degree of retention will be difficult to achieve.

- 3.38 Any planning applications for development that rely on increased market share must be required to present a robust retail trade draw to justify any uplift, not least because as referred to earlier, planning for a greater level of floorspace above identified capacity risks diluting existing in-centre expenditure.
- 3.39 A new edge-of-centre foodstore, as set out in the draft Policy BX2, will result not only in direct diversion of trade from existing in-centre stores, particularly Sainsbury's, but is also likely to result in indirect impacts through the potential loss of linked shopping trips. It is acknowledged that linkages between the Sainsbury's and the rest of the town centre are not strong by virtue of the severance created by the railway line; however, the linkage is well established and it is evident on observation that shoppers using the Sainsbury's also visit the rest of the town centre. Diversion of existing Sainsbury's shoppers to a new foodstore could break these linkages.
- 3.40 The ability of any new floorspace outwith the town centre to generate linked trips and reduce any loss in spin-off expenditure, is therefore a significant consideration in allocating any further sites. This issue is explored in more detail in the analysis of sequential sites in Section 4.
- 3.41 In comparison shopping terms, the market share of Bexhill town centre within its home zones (Bexhill East and Bexhill West) is 30%. For a centre of Bexhill's size, role, position within the wider hierarchy and relative proximity of competing higher-order centres, this level of local market share is considered reasonable. It is evident from the above analysis that there little in the way of pressing demand from comparison goods retailers in the short term. In order to alter this market share position and drive retailer demand, there would need to be a 'step change' in the attraction of the town centre to draw in retailers who currently would not consider Bexhill as a suitable location. Given the analysis on trends in the retail market, particularly the polarisation of retailing into higher-order town centres and retailers' locational strategies, set out in the preceding section, successfully delivering such a change is difficult.
- 3.42 Whilst it is acknowledged that co-location can, in some instances, promote demand and act as an anchor store to a new development, it is not considered that a foodstore development would necessarily achieve this function in terms of attracting retailers currently absent from the town centre. Having said this, although adjacencies are more limited for foodstores, Boots and Argos are noted retailers that locate by foodstores; whilst Boots is already present in town centre, Argos is not.

Certainly, it is considered unlikely that a new edge-of-centre foodstore would substantially alter the commercial draw of Bexhill town centre to retailers.

Conclusions

- Quantitative convenience need has reduced since the DWSA was published in 2008 and there is only capacity for up to c. 1,000 sqm net across the plan period
- Similarly quantitative comparison capacity has reduced as a consequence of both reduced expenditure growth and the impact of commitments, such that need only emerges towards the end of the plan period
- In qualitative terms, there has been no investment in Bexhill town centre since the DWSA was published; this is balanced against a number of new developments and commitments outside the town centre and outside Rother
- Bexhill has lost convenience market share and there is benefit in planning to reinstate this. However, any proposals that seek to utilise an uplift in market share should be robustly justified to demonstrate that it is not simply dilution of existing expenditure
- Potential loss of spin-off expenditure as a consequence of edge-of-centre development is a concern. This is considered in more detail in the sequential analysis in Section 4.

4 SEQUENTIAL SITE ANALYSIS

4.1 As part of the Council's brief (**Appendix A**), a number of sites were identified for consideration:

- Buckhurst Place
- Land adjacent to Buckhurst Place on Station Road
- Beeching Road Industrial Estate
- Ravenside Retail Park and adjoining land
- North East Bexhill local shopping centre
- Potential sites along the A259 and A269

4.2 **Appendix D** contains full sequential analysis of all the identified sites, together with OS plans showing the extent of each site.

4.3 This sequential analysis has been undertaken in the context of the retail needs identified in the preceding section which are substantially lower in quantitative terms than those identified in the DWAS 2008. The suitability of sites is therefore considered in this context and so too are their availability, with need dictating what is deemed a reasonable time period.

4.4 The table below summarises the conclusions of the analysis, with sites ordered in terms of sequential preference based on distance/accessibility from the town centre:

Table 7: Sequential Site Summary

Site	Location ⁵	Availability	Suitability	Viability
Buckhurst Place allocation	In-centre	✗	✓	✗
Land adjacent to Station Road	In/edge-of-centre	✗	✓	✗
Beeching Road Area A		Partial	Partial	Partial
(i)	Edge-of-centre (160m)	✗	✓	✗
(ii)	Edge/out-of-centre (230m)	✓	✓	✓
(iii)	Out-of-centre (350m)	✓	✗	✓
Beeching Road Area B	Edge/out-of-centre (200 to 700m)	Partial	Partial	✓
Ravenside Retail Park	Out-of-centre (2km)	✗	✗	✗
North East Bexhill local centre	Out-of-centre (2.1km)	✓	✗	✓
A269 corridor	Out-of-centre (3.5km)	Not known	✗	✓

⁵ Location provided with reference to the distance from the nearest primary shopping area in Bexhill town centre

Conclusions

- 4.5 The Beeching Road Area A site is therefore considered to be the most sequentially preferable opportunity to accommodate further retail development. However, it is evident that there are issues surrounding the assembly of a suitable site. As such, whilst the site has been considered in a number of separate parcels, there is clearly potential for a combination of land parcels to come forward, as set out in Appendix D. Fundamentally though, and particularly given the conclusions of the preceding section, the ability of a potential development to form meaningful linkages with the town centre by utilising the Terminus Road frontage and establishing visual connection is critical to ensuring any new development contributes to, rather than detracts from, the town centre.
- 4.6 However, it should be noted that there is not considered to be a significant urgency in the identified comparison capacity, particularly when the necessary caution is exercised over longer-term growth forecasts. Similarly, in convenience terms, it should be underlined that the convenience capacity identified is limited across the plan period; any development in excess of this should be assessed on its merits in terms of the ability to clawback expenditure and bring benefits to the town centre. This is explored in further detail in the following section.

5 PRINCIPLES FOR ACCOMMODATING RETAIL CAPACITY

5.1 The preceding sections confirm the following:

- Quantitative need for further convenience or comparison retail floorspace in Bexhill is limited across the plan period;
- In qualitative terms, there has been limited retail investment in Bexhill town centre. This is contrasted with the on-going investment outwith the town centre at Ravenside Retail Park and in larger town centres outwith but with influence over the District;
- Planning for floorspace in excess of identified need risks greater impact on the town centre itself. Any allocations therefore need to be considered carefully;
- A number of sequential sites have been identified and are considered in full at **Appendix 3**. Of these sites, it is concluded that, subject to detailed design, layout and improved town centre linkages, the southern portions of the Beeching Road site (Area A) represents the sequentially preferred opportunity.

5.2 This section focuses primarily on convenience goods capacity. Comparison capacity is given limited attention given the precautions set out earlier about relying on long-term growth forecasts and the fact that capacity only emerges in the later part of the plan period.

Convenience goods

5.3 It is understood that a major foodstore retailer is currently considering southern parts of Beeching Road for either a c. 2,500 sqm net or 4,000 sqm net store. It is acknowledged that as part of any foodstore development, comparison goods will form an ancillary component of the retail offer; for these purposes, it is assumed that comparison goods could account for up to 25% of the retail sales floorspace i.e. the convenience element of each option would equate to 1,875 sqm net or 3,000 sqm net and would therefore be in excess of the identified quantitative need.

5.4 The preceding qualitative analysis considered the potential for Bexhill to return to its previous convenience goods market share of 90% within the core zones (Bexhill West and Bexhill East). As shown in Table 6, this would increase capacity but it would still be below the level of floorspace promoted at Beeching Road.

5.5 It should be noted that the scope for increasing market share beyond 90% is limited. The loss of less than 10% of convenience goods expenditure is considered sustainable and reflective of the fact that many people will choose to undertake food shopping as part of a trip they are already undertaking, such as on the way home from work or other day-to-day activity in Hastings or Eastbourne.

5.6 In seeking to allocate a site, regard must be given to retailer format i.e. an allocation which has no regard to commercial requirements is unlikely to be taken up, particularly given the more constrained economic climate and retail environment outlined in Section 2. Factors influencing retailer requirements include:

- Proximity and size of competing retailers: in this instance the Sainsbury's store at Buckhurst Place is the key consideration.
 - Location: ability of a store to capture trade from a wider area than the immediate catchment.
 - Retailer's existing presence in the area
- 5.7 Previous work undertaken by GL Hearn considered the likely impact of a new foodstore on the existing town centre's vitality and viability. It concluded that impact can take two main forms:
- Direct: diversion from in-centre retailers, in this case the Sainsbury's, Co-op stores and other convenience retailers.
 - In-direct: loss of linked trip/spin-off expenditure as a result of shoppers diverting from their original in-centre choice and no longer using other town centre shops and services.
- 5.8 It is anticipated that a new foodstore of either format (2,500sqm or 4,000sqm net) would divert chiefly from Sainsbury's as the only true main food shopping opportunity in the town centre; this is confirmed in the household survey. It is also true that the Sainsbury's does experience a level of overtrading; furthermore, it is subject to qualitative deficiencies which at present there is no commercial incentive to remedy. Furthermore, it is understood that for commercial constraints imposed by the leasehold places financial burdens which are likely to commit the retailer to remaining at the site; thus, rather than withdraw from the town, it is considered more likely that Sainsbury's would seek to invest and compete with a new foodstore in order to retain their position. Fundamentally it is considered that a new store would be unlikely to result in the closure of the Sainsbury's.
- 5.9 However, the impact on loss of linked trip spending is more difficult to quantify, particularly given the fact that the Sainsbury's store is separated from the main part of the town centre by the railway line and is not orientated to encourage strong linkages. That said, the Sainsbury's store is part of the town centre and the 2006 Local Plan allocation on the site seeks to improve the quality of this linkage.
- 5.10 Given that Beeching Road (Area A – Southern area/s) are sequentially preferable for the location of new convenience floorspace, any development at this location should therefore include the following principles:
- Provide active frontage and an entrance onto Terminus Road
 - Improve the quality of the linkage to the defined town centre through measures such as widening pavements, including the reconfiguration of the existing Sackville Road/Terminus Road and Buckhurst Place junction and introducing signage
 - Introduce car parking controls to allow shoppers to undertake linked trips to the main town centre
 - Any proposals in excess of the identified quantitative capacity will be tested in impact terms at the application stage. This is explained in further detail in the review of impact thresholds at paragraph 5.11 onwards.

Comparison goods

- 5.11 In quantitative terms, there is no urgent need for further comparison floorspace in Bexhill. Indeed, over the short term, there is a deficiency.
- 5.12 Whilst it is considered that Beeching Road has the potential to accommodate further comparison floorspace in the long term, given the uncertainty associated with long-term expenditure growth rates and the ability of existing comparison floorspace to trade more efficiently (i.e. potentially absorbing some identified growth), it is recommended that the Council make only a provisional long-term allocation at this juncture with a view to reviewing when the evidence base is next updated.
- 5.13 Having regard to the potential for applications to come forward at any point in the plan period, in order to safeguard the town centre, it is considered essential that this allocation requires any application to undertake a full sequential and impact assessment.

Impact threshold

- 5.14 Whilst the preceding sections of this report have considered issues of the sequential approach and capacity, it is only at the point that a planning application is made that the impact on defined town centres can be properly considered. This is particularly true in this instance whereby the quantitative need identified is more limited than in DWSA and the fact that there are no suitable sites within the town centre that could accommodate this need.
- 5.15 Since the DWSA was undertaken, there have been changes in the national planning context. The NPPF includes the following guidance at paragraph 26:

'When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm).'

- 5.16 The importance of local circumstances and setting policy at a local level is as central plank of The Localism Act which demonstrates the Government is committed to passing new powers and freedoms to Local Authorities. The reforms include changes to the way local plans are made, the Summary Document of the Localism Act states:

Local planning authorities play a crucial role in local life, setting a vision, in consultation with local people, about what their area should look like in the future. The plans local authorities draw up set out where new buildings, shops, businesses and infrastructure need to go, and what they should look like.

The Government thinks it is important to give local planning authorities greater freedom to get on with this important job without undue interference from central government. The Localism

Act will limit the discretion of planning inspectors to insert their own wording into local plans. It also ensures that rather than focussing on reporting progress in making plans to central government, authorities focus on reporting progress to local communities.'

- 5.17 Guidance on the relevant considerations to take into account in defining such local floorspace/development thresholds is provided in paragraph 7.4 of the Practice Guidance on Need, Impact and the Sequential Approach, published in December 2009. This states that, when setting a local floorspace threshold:

'important considerations are likely to include the scale of known proposals relative to town centres; the existing vitality and viability of town centres; the cumulative effects of recent developments; the likely effects on a town centre strategy and the impact on any other planned investment'.

- 5.18 As set above, whilst there has been no substantial retail development in Bexhill town centre in recent years, there have been a number of out-of-centre retail developments approved. Until these have established mature trading patterns, the true impact on Bexhill town centre is unresolved. The need for adequate impact assessment in support any significant retail planning applications for development outside the town centre is clear given the Government's stance on taking a town-centre first approach to development.
- 5.19 The DWAS confirmed that Bexhill town centre is 'dominated by a large number of smaller units'. Whilst this suits local independent traders and service providers, national multiples tend to seek larger units to fit with their trading formats. Given this lack of larger in-centre premises, the acknowledgement that multiple retailer representation is relatively low, combined with the fact that a higher level of representation would be likely to increase the attraction of the centre, it is logical to expect that should applications come forward, they would be in edge-of-centre or out-of-centre locations.
- 5.20 Balanced against this, the previous sections identified relatively limited convenience capacity over the plan period, as well as identifying that comparison capacity will only arise at the latter end of the plan period, when forecasts are less reliable. This, together with the importance of the independent sector in Bexhill town centre and in order to ensure its continued vitality and viability, the imposition of a locally-set threshold is recommended to allow applications to be assessed on their own merits. A conservative approach towards the allocation of sites, which requires applicants to undertake both sequential and impact assessment, is therefore recommended.
- 5.21 Having regard to typical town centre unit sizes within Bexhill where the vast majority are less than 200 sqm (gross) and only six are in excess of 500 sqm (gross), and the limited quantitative capacity in the short- to medium-term, it is recommended that 500 sqm (GEA) is an appropriate threshold at which to require applicants to undertake an impact assessment in line with paragraph 26 of the NPPF.

Development-specific advice

- 5.22 As set out in **Appendix A**, the brief sought 'more detailed advice in relation to (only) the recommended location(s) for further retail development sufficient to support a draft allocation and to assist the Council advice to prospective retail developers on potential areas and development principles in pre-application discussions'.
- 5.23 However, given the limited quantitative capacity identified for retail convenience floorspace over the plan period and the emergence of comparison capacity only in the latter part of the plan period, it has been agreed with the Council that it is not been appropriate to fulfil Part 3 of the brief. Accordingly, this report does not provide more detailed advice relating to the how development could be accommodated within the sequentially preferable site identified through this Bexhill Retail Study Update, the potential knock-on implications of convenience retail at this location or the types of occupants likely to be attracted to adjacent sites should such a development be brought forward at this location.
- 5.24 In the event that planning applications for convenience or comparison-led retail development in the identified location, it is recommended that this position should be reviewed.

APPENDIX A: Rother District Council Retail Brief

Bexhill Retail Brief

Introduction and Purpose

Rother District Council is beginning work on its 'Development and Site Allocations DPD' as the second part of its Local Plan. The first part, the Local Plan Strategy, is currently at examination. The Strategy, as proposed to be modified, will look to focus development in the district at Bexhill, in accordance with the extant South East Plan.

To support any new retail site allocations, the Council needs to ensure they have an up-to-date and robust evidence base relating to future retail needs in Bexhill, the suitability of potential locations based on a sequential test and a clear idea of how suitable site(s) may be developed to fulfil this test. In addition, consideration must be given to any synergies that may exist and their potential contribution to local planning objectives.

Consultancy advice is required in relation to meeting these requirements.

Context

The Council's 'Proposed Submission Core Strategy' document, as proposed to be modified, identifies Bexhill as having potential for additional convenience and comparison goods floorspace and proposes an additional 2,500sq.m convenience goods and 4,000sq.m comparison goods floorspace, 'primarily through 'edge of centre' retail expansion on the north side of the railway, as well as the effective use of town centre accommodation'. This is based on a Shopping Assessment undertaken in 2008, and covers the period 2011-2028.

Work in 2010 advised on the sequential approach and retail impact on the town centre which would arise from a number of different foodstore development scenarios. It concluded that consideration should be given to edge of centre locations, which were broadly identified.

Since then, there have been some changes since these earlier studies, notably in terms of:

- foodstores outside Bexhill that may affect shopping patterns
- approval of an M&S store at Ravenside retail park
- a wider shift in retailing patterns and spend forecasts
- the extension of the plan period from 2026 to 2028
- the scale and timing of new housing development in Bexhill
- emergence of the Core Strategy policies for retailing, specifically in Bexhill
- further food retailer interest in the Beeching Road industrial estate

Scope of the Study

The Study is in 3 parts.

1. An update/validation of previous work relating to the overall quantum of retail development required over the plan period (2011-2028)
2. Consideration of the areas where the floorspace requirements could be accommodated in accordance with the sequential approach and local policies
3. Advice on the site development principles for accommodating the quantum and nature of retail floorspace identified at the preferred locations, having due regard to occupancy, viability and the implications for land use in the locality.

Tasks

Part 1 – this part should ensure that the Council has an up-to-date understanding of the quantum of likely need for additional retail floorspace (convenience, comparison, service trade and bulky goods floorspace) to assist in determining the scale and form of future site allocations and permissions to help Bexhill retain and improve its shopping position in the sub-regional context.

The Assessment should:

- i. Update previous household survey findings, by taking account of recent and planned retail floorspace in other towns, to include Eastbourne, Hastings, Tunbridge Wells, Ashford and Folkestone. Including an update of the base statistics to incorporate data relating to consumer spending, spending growth forecasts (including internet sales);
- ii. Indicate the extent of trade being 'lost' from Bexhill to other shopping centres within and outside the District, the reasons for this and the potential to re-capture trade;
- iii. Advise on the overall need for additional shopping floorspace in Bexhill, by convenience, comparison and service trade sectors.

In addition, advice is sought on what should be a locally set floorspace threshold where retail planning applications outside the Town Centre should be required to conduct an impact assessment.

Part 2 – this part should inform the subsequent identification of potential sites to accommodate the needs identified in part 1 in the context of the sequential test through advice on the relative merits of alternative locations for meeting shopping (convenience & comparison) demand in Bexhill, using the sequential approach site selection.

The Assessment should:

- i. Build on the previous work relating to the 'Testing of Retail Scenarios for Bexhill'
- ii. Have regard to proposals currently being put forward by retail operators (to be advised by RDC)
- iii. Update previous work ('Testing of Retail Scenarios for Bexhill') to advise on the order of appropriateness of different locations (Town Centre, Edge of Centre and Out of Centre sites). These should cover the following locations:

- the existing allocation embracing Sainsburys in the Local Plan
- adjacent land on Station Road
- the Beeching Road industrial estate (which will have different parts)
- the identified local shopping centre within the NE Bexhill allocation
- Ravenside Retail Park and adjoining land, including Brett Drive
- Any developable sites along main transport routes (A259 and A269)

NB These areas are relatively well defined; details will be provided at the inception meeting. No potential for significant new floorspace is identified within the existing 'district centres'.

- iv. Consider the viability of providing retail space in these locations
- v. Give clear consideration to how linked trips to the Town Centre would be most effectively encouraged
- vi. Have explicit regard to the likely impact (in terms of vitality and vibrancy of the town centre, impact of further retail investment, impact on footfall) in the Town

and District centres as the result of any potential edge of centre or out of centre retail development

Part 3 – this should give more detailed advice in relation to (only) the recommended location(s) for further retail development sufficient to support a draft allocation and to assist the Council advise prospective retail developers on potential areas and development principles in pre-application discussions.

This part should:

- i. Advise on development principles for any development in the favoured location(s), including scale, range of retail activities, site disposition and linkages
- ii. Consider the types of likely occupants who would be attracted to a development, and to adjacent sites, if applicable
- iii. In relation to Beeching Road, the advice under (ii) above should specifically cover the knock-on implications of a major convenience development for the demand for other retail units and, hence on the use existing commercial/industrial units
- iv. Advise, in broad terms, on likely viability issues, including site assimilation and construction of retail units in liaison with the Council's Head of Regeneration and the Project Manager and likely effect on rental values (£/sqm) over time

NB It is noted that a further element of work may follow in relation to providing advice and commenting upon the information and proposed heads of terms that have been provided in connection with pre-application discussions on a site in Beeching Road, including advice upon the viability of the acquisition of frontage units at Terminus Road, and how this may be offset by adjustments to the heads of terms. However, this is not part of the current commission.

Data sources

The following data sources will be provided by Rother District Council in order to assist the drafting of the Study:

- All relevant policy documentation
- Any necessary base mapping, as required
- Previous 'Shopping Assessment', 'Testing of Retail Scenarios for Bexhill' and retail study/critique re M&S at Ravenside, Bexhill
- Any relevant planning application information for retail schemes within the District
- Survey information on the number of vacant units in Bexhill Town Centre
- Occupancy information together with development interest (including for redevelopment) at Beeching Road
- Update of new food stores in the sub-region (since the 2010 study), together know retail floorspace commitments and proposals in competing centres
- Details of current large scale housing commitments/allocations, as well as indicative broad distributions of additional dwellings from the Core Strategy
- Details of relevant freehold and/or leasehold information where the Council has an interest at potential development locations.
- Any relevant information relating to pre-application advice given to retail operators for potential convenience and/or comparison goods schemes within the District.

Outputs and timescales

Two paper copies of the typed report that fulfils the requirements of the Brief are required, as well as one electronic version (in Word and 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 (GGP).

The project must be completed by the end of March 2013. 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.

Budget

There is no fixed budget, but achieving best value for money in meeting the requirements of the Brief is the prime consideration.

Submission

A submission is invited for the above work. This should be received by Friday 1st February 2013 by letter or email setting out:

- A fixed fee for elements identified in the brief
- 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.

Project Management and Appointment Procedure

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: Quantitative Capacity Assessment – Baseline Growth

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

1. New stores and commitments

	Net sales area	Convenience	Comparison	Convenience trading density 2012	Convenience turnover 2013 (£M)	Comparison trading density 2012	Comparison turnover 2013 (£M)
Within the District							
Marks & Spencer, Ravenside Retail Park, Bexhill	3,121	743	2,378	£11,165	£8.31	£2,142	£5.22
Jempsons/Budgens extension, Rye	595	506	89	£4,542	£2.30	£2,813	£0.26
Sainsbury's, Ferry Road, Rye	1,727	1,382	345	£13,141	£18.20	£6,011	£2.13
Tesco, Ferry Road, Rye	1,525	1,372	153	£13,021	£17.90	£7,182	£1.13
Jempsons/Budgens extension, Peasmarsh	1,670	1,420	251	£4,542	£6.46	£2,813	£0.72
Outside Rother							
Morrisons, Hampden Park, Eastbourne	3,473	2,897	576	£12,864	£37.34	£7,575	£4.47
Sovereign Harbour Retail Park	3,544	975	3,544	£10,020	£9.77	£3,225	£11.43
Asda Silverhill, Hastings	3,570	2,249	1,321	£11,347	£25.57		

Notes

Trading densities derived from Verdict 2012

Sales efficiency of 0.2% and 2.5% pa applied to convenience and comparison respectively

Sales areas provided by relevant local planning authorities

No details available on the Jempsons/Budgens convenience/comparison splits - 85/15 split assumed

Sovereign Harbour Retail Park proposal assumes flexibility to provide up to 975 sqm net convenience. Turnover derived from retail assessment

Tesco Ferry Road resolution to grant - planning permission not issued. Scheme on the same site as Sainsbury's permission, therefore only Sainsbury's built into revised baseline position

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

2. Population

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	16,932	29,535	8,802	12,955	15,857	7,620	91,701
2013	17,535	30,028	8,942	13,318	16,183	7,739	93,745
2016	18,137	30,520	9,082	13,681	16,508	7,858	95,786
2018	18,536	30,847	9,175	13,921	16,723	7,937	97,141
2023	19,529	31,659	9,406	14,519	17,259	8,133	100,504
2028	20,514	32,465	9,636	15,113	17,791	8,328	103,846

3. Expenditure per person 2011 (inc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	
Convenience	£1,812	£2,070	£2,194	£2,057	£2,033	£2,019	
Comparison	£2,400	£2,828	£3,557	£3,135	£2,653	£2,791	

4. Convenience expenditure per person (exc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	
2011	£1,775	£2,027	£2,149	£2,015	£1,991	£1,978	
2013	£1,749	£1,997	£2,117	£1,985	£1,962	£1,949	
2016	£1,758	£2,007	£2,127	£1,995	£1,971	£1,958	
2018	£1,768	£2,020	£2,140	£2,007	£1,983	£1,970	
2023	£1,819	£2,078	£2,202	£2,065	£2,040	£2,027	
2028	£1,884	£2,152	£2,280	£2,138	£2,113	£2,099	

Notes

SFT deducted in line with Experian Retail Planner Briefing Note 10.1 Appendix 3

Expenditure growth in line with Experian Retail Planner Briefing Note 10.1 Figure 1a

5. Convenience expenditure generated (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	£30.06	£59.88	£18.91	£26.10	£31.57	£15.07	£181.59
2013	£30.67	£59.98	£18.93	£26.44	£31.74	£15.08	£182.84
2016	£31.88	£61.27	£19.32	£27.29	£32.54	£15.39	£187.68
2018	£32.78	£62.30	£19.64	£27.94	£33.17	£15.64	£191.46
2023	£35.52	£65.77	£20.71	£29.98	£35.21	£16.48	£203.68
2028	£38.65	£69.86	£21.97	£32.31	£37.59	£17.48	£217.87

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

6. Comparison expenditure by category 2011 (inc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight
Clothing & Footwear	£556.77	£620.31	£805.47	£709.03	£590.01	£615.49
Chemist & Personal Care	£386.39	£486.16	£564.32	£489.99	£384.36	£407.22
Books & Media	£101.32	£124.29	£174.77	£150.04	£127.12	£130.21
Recreation & Leisure Goods	£309.29	£375.53	£548.77	£469.29	£414.73	£450.68
China, Glass & Home Textiles	£203.13	£252.62	£327.69	£289.65	£220.07	£234.85
Household Appliances	£104.71	£117.47	£117.72	£112.86	£105.82	£113.47
Audio Visual Equipment	£336.41	£343.50	£368.08	£347.59	£307.83	£303.66
Furniture, Furnishings & Carpets	£200.19	£253.45	£298.83	£262.93	£225.87	£240.67
DIY, Decorating & Gardening	£201.86	£254.48	£351.62	£303.47	£277.59	£295.24
Total	£2,400	£2,828	£3,557	£3,135	£2,653	£2,791

7. Comparison expenditure per head exc. SFT (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight
2011	£2,249	£2,661	£3,189	£2,889	£2,407	£2,567
2013	£2,322	£2,746	£3,292	£2,983	£2,484	£2,650
2016	£2,517	£2,978	£3,569	£3,234	£2,694	£2,873
2018	£2,665	£3,153	£3,779	£3,424	£2,852	£3,042
2023	£3,087	£3,652	£4,376	£3,966	£3,303	£3,523
2028	£3,579	£4,233	£5,074	£4,597	£3,829	£4,085

8. Comparison expenditure generated exc. SFT (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	£38.08	£78.58	£28.07	£37.43	£38.16	£19.56	£239.89
2013	£40.71	£82.47	£29.43	£39.72	£40.20	£20.51	£253.05
2016	£45.66	£90.88	£32.41	£44.24	£44.47	£22.58	£280.24
2018	£49.41	£97.26	£34.67	£47.67	£47.70	£24.15	£300.86
2023	£60.29	£115.61	£41.17	£57.58	£57.01	£28.66	£360.30
2028	£73.41	£137.43	£48.89	£69.48	£68.13	£34.02	£431.36

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

9. Convenience Shopping - Implied Turnovers

Store/Location	2013 (baseline + Asda Silverhill)							2016 (baseline + Asda Silverhill + M&S)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£9.00	£14.43	£0.00	£0.06	£0.00	£0.00	£23.49	£8.49	£13.89	£0.00	£0.06	£0.00	£0.00	£22.44
Co-op, Bexhill, Devonshire Rd	£2.40	£1.48	£0.00	£0.00	£0.08	£0.00	£3.95	£2.32	£1.51	£0.00	£0.00	£0.08	£0.00	£3.91
Co-op, Bexhill, Western Rd	£0.96	£1.47	£0.00	£0.00	£0.04	£0.00	£2.47	£1.00	£1.50	£0.00	£0.00	£0.04	£0.00	£2.54
Local Store, Bexhill	£1.82	£1.72	£0.08	£0.00	£0.00	£0.00	£3.63	£1.90	£1.76	£0.08	£0.00	£0.00	£0.00	£3.74
Bexhill Town Centre														
Budgen, Battle, Market Square	£0.00	£0.86	£0.00	£3.75	£0.00	£0.09	£4.70	£0.00	£0.88	£0.00	£3.74	£0.00	£0.09	£4.71
Co-op, Battle, High St	£0.05	£0.08	£0.00	£0.37	£0.00	£0.00	£0.49	£0.05	£0.08	£0.00	£0.38	£0.00	£0.00	£0.51
Local Store, Battle	£0.00	£0.00	£0.00	£0.38	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.39	£0.00	£0.00	£0.39
Battle Town Centre														
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.06	£4.45	£0.00	£4.51	£0.00	£0.00	£0.00	£0.06	£4.56	£0.00	£4.62
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.02	£0.16	£2.18	£0.00	£0.00	£0.00	£0.00	£2.07	£0.17	£2.23
Rye Town Centre														
Lidl, Sidley, Ninfield Rd	£0.60	£2.40	£0.00	£0.19	£0.04	£0.00	£3.22	£0.62	£2.45	£0.00	£0.19	£0.04	£0.00	£3.30
Local Store, Sidley	£0.07	£0.64	£0.00	£0.00	£0.00	£0.00	£0.71	£0.07	£0.65	£0.00	£0.00	£0.00	£0.00	£0.72
Co-op, Sidley, Ninfield Rd	£0.38	£1.07	£0.00	£0.00	£0.00	£0.00	£1.45	£0.40	£1.09	£0.00	£0.00	£0.00	£0.00	£1.49
Sidley District Centre, Bexhill														
Co-op, Little Common, Cooden Sea Rd	£0.00	£2.82	£0.00	£0.00	£0.44	£0.00	£3.26	£0.00	£2.88	£0.00	£0.00	£0.45	£0.00	£3.33
Local Store, Little Common	£0.15	£0.84	£0.00	£0.00	£0.00	£0.00	£0.99	£0.15	£0.86	£0.00	£0.00	£0.00	£0.00	£1.01
Little Common District Centre, Bexhill														
Aldi, Bexhill, London Rd	£1.24	£2.71	£0.00	£0.13	£0.00	£0.00	£4.08	£1.12	£2.60	£0.00	£0.13	£0.00	£0.00	£3.85
Tesco, Bexhill, Collington Ave	£0.53	£1.95	£0.00	£0.12	£0.04	£0.12	£2.76	£0.55	£1.98	£0.00	£0.13	£0.04	£0.12	£2.83
Jempson, Peasmarsh, Main St	£0.00	£0.13	£0.25	£0.38	£4.48	£0.19	£5.44	£0.00	£0.13	£0.26	£0.38	£4.60	£0.20	£5.57
Tesco, Bexhill, Ravenside	£10.48	£13.19	£0.25	£0.83	£0.21	£0.12	£25.08	£9.59	£12.20	£0.19	£0.86	£0.22	£0.12	£23.18
M&S, Bexhill, Ravenside								£3.05	£3.26	£0.49	£0.43	£0.70	£0.59	£8.53
Tesco Express, Battle, Battle Hill	£0.00	£0.42	£0.00	£1.04	£0.08	£0.09	£1.63	£0.00	£0.43	£0.00	£1.08	£0.08	£0.09	£1.68
Out Of Centre Stores In Rother														
Local Store, Burwash	£0.00	£0.00	£1.72	£0.06	£0.00	£0.00	£1.78	£0.00	£0.00	£1.76	£0.06	£0.00	£0.00	£1.82
Local Store, Robertsbridge	£0.05	£0.00	£0.00	£1.55	£0.00	£0.00	£1.59	£0.05	£0.00	£0.00	£1.60	£0.00	£0.00	£1.65
Local Store, Ticehurst	£0.00	£0.00	£1.49	£0.00	£0.00	£0.00	£1.49	£0.00	£0.00	£1.52	£0.00	£0.00	£0.00	£1.52
Local Store, Sedlescombe	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.70
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.24
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.27
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.59	£0.00	£0.00	£0.00	£0.00	£0.61	£0.00	£0.61
Local Store, Catsfield	£0.00	£0.35	£0.00	£0.08	£0.00	£0.00	£0.42	£0.00	£0.35	£0.00	£0.08	£0.00	£0.00	£0.43
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.33	£1.33	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£1.35
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.44	£0.35	£0.79	£0.00	£0.00	£0.00	£0.00	£0.45	£0.36	£0.81
Local Store, Etchingham	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.76	£0.00	£0.00	£0.00	£0.76
Local Store, Hurst Green	£0.00	£0.00	£0.41	£0.08	£0.00	£0.00	£0.49	£0.00	£0.00	£0.42	£0.08	£0.00	£0.00	£0.50
Local Stores/Village Centres In Rother														
Stores outside the District														
Asda, Eastbourne, Crumbles	£0.65	£3.00	£0.17	£0.06	£0.00	£0.15	£4.04	£0.59	£2.90	£0.18	£0.06	£0.00	£0.15	£3.88
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.22	£1.51	£1.00	£5.35	£3.52	£2.65	£14.25	£0.22	£1.37	£0.85	£5.36	£3.53	£2.54	£13.86
Morrison, Hastings, Queens Road	£0.15	£0.39	£0.16	£1.02	£1.31	£2.65	£5.67	£0.15	£0.40	£0.16	£1.05	£1.34	£2.54	£5.64
Tesco, Hastings, St Leonards, Churchwood Drive	£0.28	£1.20	£1.00	£2.68	£1.60	£1.66	£8.42	£0.12	£1.06	£0.85	£2.77	£1.56	£1.61	£7.96
Asda Silverhill, Hastings	£0.29	£1.50	£1.00	£4.01	£2.00	£1.96	£10.76	£0.21	£1.36	£1.02	£4.14	£2.05	£2.00	£10.79
Large Stores Outside Rother with Significant Influence														
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.49	£0.07	£0.57	£0.00	£0.00	£0.00	£0.00	£0.51	£0.08	£0.58
Budgen, Hawkhurst, Rye Rd	£0.00	£0.08	£1.18	£0.33	£1.02	£0.09	£2.69	£0.00	£0.08	£1.20	£0.34	£1.05	£0.09	£2.76
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.30	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.30
Co-op, Eastbourne, Albert Parade	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08
Co-op, Hailsham, The Quintons	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Heathfield, High St	£0.00	£0.00	£2.92	£0.19	£0.00	£0.00	£3.11	£0.00	£0.00	£2.94	£0.19	£0.00	£0.00	£3.13
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.38	£0.41	£0.00	£0.00	£0.00	£0.00	£0.04	£0.39	£0.42
Co-op, Polegate, The Centre	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10
Co-op, St Leonards, London Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£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	£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	£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	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costcutter, Wadhurst, Sparrows Green Rd	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.38	£0.00	£0.00	£0.39	£0.00	£0.00	£0.00	£0.39
Iceland, Hastings, Castle St	£0.00	£0.00	£0.05	£0.00	£0.00	£0.15	£0.20	£0.00	£0.00	£0.05	£0.00	£0.00	£0.15	£0.20
Iceland, Ashford, High St	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Iceland, Eastbourne, Langney Road	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
Iceland, Tunbridge Wells, Calverley Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, St Leonards, Bohemia Rd	£0.00	£0.05	£0.00	£0.06	£0.26	£0.16	£0.53	£0.00	£0.05	£0.00	£0.06	£0.26	£0.17	£0.54
Local Store, Hastings	£0.00	£0.00	£0.00	£0.43	£0.44	£0.18	£1.05	£0.00	£0.00	£0.00	£0.32	£0.32	£0.18	£0.82
Marks & Spencer, Eastbourne	£0.07	£0.47	£0.00	£0.00	£0.00	£0.00	£0.54	£0.07	£0.32	£0.00	£0.00	£0.00	£0.00	£0.39
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.20	£0.13	£0.09	£0.06	£									

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

9. Convenience Shopping - Implied Turnovers (con)

Store/Location	2018							2023						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£8.73	£14.12	£0.00	£0.07	£0.00	£0.00	£22.91	£9.46	£14.91	£0.00	£0.07	£0.00	£0.00	£24.44
Co-op, Bexhill, Devonshire Rd	£2.38	£1.54	£0.00	£0.00	£0.08	£0.00	£4.00	£2.58	£1.62	£0.00	£0.00	£0.08	£0.00	£4.29
Co-op, Bexhill, Western Rd	£1.03	£1.53	£0.00	£0.00	£0.04	£0.00	£2.60	£1.12	£1.61	£0.00	£0.00	£0.04	£0.00	£2.77
Local Store, Bexhill	£1.95	£1.79	£0.08	£0.00	£0.00	£0.00	£3.82	£2.11	£1.89	£0.09	£0.00	£0.00	£0.00	£4.09
Bexhill Town Centre														
Budgen, Battle, Market Square	£0.00	£0.89	£0.00	£3.83	£0.00	£0.09	£4.81	£0.00	£0.94	£0.00	£4.11	£0.00	£0.10	£5.15
Co-op, Battle, High St	£0.05	£0.08	£0.00	£0.39	£0.00	£0.00	£0.52	£0.06	£0.08	£0.00	£0.42	£0.00	£0.00	£0.56
Local Store, Battle	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.40	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.43
Battle Town Centre														
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.06	£4.65	£0.00	£4.71	£0.00	£0.00	£0.00	£0.07	£4.94	£0.00	£5.00
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.11	£0.17	£2.28	£0.00	£0.00	£0.00	£0.00	£2.24	£0.18	£2.42
Rye Town Centre														
Lidl, Sidley, Ninfield Rd	£0.64	£2.49	£0.00	£0.20	£0.04	£0.00	£3.37	£0.70	£2.63	£0.00	£0.21	£0.04	£0.00	£3.58
Local Store, Sidley	£0.07	£0.66	£0.00	£0.00	£0.00	£0.00	£0.74	£0.08	£0.70	£0.00	£0.00	£0.00	£0.00	£0.78
Co-op, Sidley, Ninfield Rd	£0.41	£1.11	£0.00	£0.00	£0.00	£0.00	£1.52	£0.44	£1.17	£0.00	£0.00	£0.00	£0.00	£1.61
Sidley District Centre, Bexhill														
Co-op, Little Common, Cooden Sea Rd	£0.00	£2.93	£0.00	£0.00	£0.46	£0.00	£3.39	£0.00	£3.10	£0.00	£0.00	£0.48	£0.00	£3.58
Local Store, Little Common	£0.16	£0.87	£0.00	£0.00	£0.00	£0.00	£1.03	£0.17	£0.92	£0.00	£0.00	£0.00	£0.00	£1.09
Little Common District Centre, Bexhill														
Aldi, Bexhill, London Rd	£1.15	£2.65	£0.00	£0.13	£0.00	£0.00	£3.93	£1.25	£2.79	£0.00	£0.14	£0.00	£0.00	£4.18
Tesco, Bexhill, Collington Ave	£0.12	£2.02	£0.00	£0.13	£0.04	£0.00	£2.28	£0.61	£2.14	£0.00	£0.14	£0.04	£0.13	£3.06
Jempson, Peasmarsh, Main St	£0.00	£0.13	£0.26	£0.39	£4.69	£0.20	£5.67	£0.00	£0.14	£0.28	£0.42	£4.97	£0.21	£6.02
Tesco, Bexhill, Ravenside	£9.86	£12.40	£0.20	£0.88	£0.22	£0.12	£23.69	£10.69	£13.10	£0.21	£0.94	£0.24	£0.13	£25.30
M&S, Bexhill, Ravenside	£3.14	£3.32	£0.50	£0.44	£0.72	£0.60	£8.71	£3.40	£3.50	£0.52	£0.48	£0.76	£0.64	£9.30
Tesco Express, Battle, Battle Hill	£0.00	£0.44	£0.00	£1.10	£0.08	£0.09	£1.71	£0.00	£0.46	£0.00	£1.18	£0.08	£0.10	£1.83
Out Of Centre Stores In Rother														
Local Store, Burwash	£0.00	£0.00	£1.79	£0.07	£0.00	£0.00	£1.85	£0.00	£0.00	£1.88	£0.07	£0.00	£0.00	£1.95
Local Store, Robertsbridge	£0.05	£0.00	£0.00	£1.63	£0.00	£0.00	£1.69	£0.06	£0.00	£0.00	£1.75	£0.00	£0.00	£1.81
Local Store, Ticehurst	£0.00	£0.00	£1.54	£0.00	£0.00	£0.00	£1.54	£0.00	£0.00	£1.63	£0.00	£0.00	£0.00	£1.63
Local Store, Sedlescombe	£0.00	£0.00	£0.72	£0.00	£0.00	£0.00	£0.72	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.77
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.24	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.26
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.29
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£0.62	£0.00	£0.00	£0.00	£0.00	£0.65	£0.00	£0.65
Local Store, Catsfield	£0.00	£0.36	£0.00	£0.08	£0.00	£0.00	£0.44	£0.00	£0.38	£0.00	£0.09	£0.00	£0.00	£0.47
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£1.45	£1.45
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.46	£0.36	£0.82	£0.00	£0.00	£0.00	£0.00	£0.49	£0.38	£0.87
Local Store, Etchingham	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.81
Local Store, Hurst Green	£0.00	£0.00	£0.42	£0.08	£0.00	£0.00	£0.51	£0.00	£0.00	£0.45	£0.09	£0.00	£0.00	£0.53
Local Stores/Village Centres In Rother														
Stores outside the District														
Asda, Eastbourne, Crumbles	£0.60	£2.95	£0.18	£0.07	£0.00	£0.16	£3.95	£0.65	£3.11	£0.19	£0.07	£0.00	£0.16	£4.19
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.23	£1.39	£0.86	£5.48	£3.59	£2.58	£14.14	£0.25	£1.47	£0.91	£5.88	£3.81	£2.72	£15.05
Morrison, Hastings, Queens Road	£0.16	£0.41	£0.17	£1.08	£1.37	£2.58	£5.75	£0.17	£0.43	£0.17	£1.15	£1.45	£2.72	£6.09
Tesco, Hastings, St Leonards, Churchwood Drive	£0.12	£1.08	£0.87	£2.83	£1.59	£1.63	£8.12	£0.13	£1.14	£0.91	£3.04	£1.69	£1.72	£8.63
Asda Silverhill, Hastings	£0.22	£1.38	£1.04	£4.24	£2.09	£2.03	£11.00	£0.24	£1.46	£1.09	£4.55	£2.22	£2.14	£11.70
Large Stores Outside Rother with Significant Influence														
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.52	£0.08	£0.59	£0.00	£0.00	£0.00	£0.00	£0.55	£0.08	£0.63
Budgen, Hawkhurst, Rye Rd	£0.00	£0.08	£1.22	£0.35	£1.07	£0.09	£2.81	£0.00	£0.08	£1.29	£0.37	£1.14	£0.10	£2.97
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.31	£0.00	£0.05	£0.19	£0.00	£0.08	£0.00	£0.33
Co-op, Eastbourne, Albert Parade	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08
Co-op, Hailsham, The Quintons	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Heathfield, High St	£0.00	£0.00	£2.99	£0.20	£0.00	£0.00	£3.19	£0.00	£0.00	£3.15	£0.21	£0.00	£0.00	£3.36
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.39	£0.43	£0.00	£0.00	£0.00	£0.00	£0.04	£0.41	£0.45
Co-op, Polegate, The Centre	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11
Co-op, St Leonards, London Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£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	£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	£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	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costcutter, Wadhurst, Sparrows Green Rd	£0.00	£0.00	£0.40	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.42	£0.00	£0.00	£0.00	£0.42
Iceland, Hastings, Castle St	£0.00	£0.00	£0.05	£0.00	£0.00	£0.16	£0.21	£0.00	£0.00	£0.05	£0.00	£0.00	£0.17	£0.22
Iceland, Ashford, High St	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Iceland, Eastbourne, Langney Road	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06
Iceland, Tunbridge Wells, Calverley Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, St Leonards, Bohemia Rd	£0.00	£0.05	£0.00	£0.07	£0.27	£0.17	£0.55	£0.00	£0.05	£0.00	£0.07	£0.28	£0.18	£0.58
Local Store, Hastings	£0.00	£0.00	£0.00	£0.33	£0.33	£0.18	£0.84	£0.00	£0.00	£0.00	£0.35	£0.35	£0.19	£0.89
Marks & Spencer, Eastbourne	£0.07	£0.32	£0.00	£0.00	£0.00	£0.00	£0.39	£0.08	£0.34	£0.00	£0.00	£0.00	£0.00	£0.42
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.01	£0.09	£0.											

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

9. Convenience Shopping - Implied Turnovers (con)

2028							
Store/Location	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£10.29	£15.83	£0.00	£0.08	£0.00	£0.00	£26.20
Co-op, Bexhill, Devonshire Rd	£2.81	£1.72	£0.00	£0.00	£0.09	£0.00	£4.62
Co-op, Bexhill, Western Rd	£1.21	£1.71	£0.00	£0.00	£0.04	£0.00	£2.97
Local Store, Bexhill	£2.30	£2.00	£0.09	£0.00	£0.00	£0.00	£4.40
Bexhill Town Centre							
Budgen, Battle, Market Square	£0.00	£1.00	£0.00	£4.43	£0.00	£0.10	£5.53
Co-op, Battle, High St	£0.06	£0.09	£0.00	£0.45	£0.00	£0.00	£0.60
Local Store, Battle	£0.00	£0.00	£0.00	£0.46	£0.00	£0.00	£0.46
Battle Town Centre							
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.07	£5.27	£0.00	£5.34
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.39	£0.19	£2.58
Rye Town Centre							
Lidl, Sidley, Ninfield Rd	£0.76	£2.79	£0.00	£0.23	£0.04	£0.00	£3.82
Local Store, Sidley	£0.09	£0.74	£0.00	£0.00	£0.00	£0.00	£0.83
Co-op, Sidley, Ninfield Rd	£0.48	£1.24	£0.00	£0.00	£0.00	£0.00	£1.72
Sidley District Centre, Bexhill							
Co-op, Little Common, Cooden Sea Rd	£0.00	£3.29	£0.00	£0.00	£0.52	£0.00	£3.80
Local Store, Little Common	£0.19	£0.98	£0.00	£0.00	£0.00	£0.00	£1.17
Little Common District Centre, Bexhill							
Aldi, Bexhill, London Rd	£1.36	£2.97	£0.00	£0.15	£0.00	£0.00	£4.48
Tesco, Bexhill, Collington Ave	£0.67	£2.27	£0.00	£0.15	£0.04	£0.14	£3.27
Jempson, Peasmarsh, Main St	£0.00	£0.15	£0.30	£0.46	£5.31	£0.22	£6.43
Tesco, Bexhill, Ravenside	£11.63	£13.91	£0.22	£1.02	£0.25	£0.14	£27.16
M&S, Bexhill, Ravenside	£3.70	£3.72	£0.55	£0.51	£0.81	£0.67	£9.97
Tesco Express, Battle, Battle Hill	£0.00	£0.49	£0.00	£1.28	£0.09	£0.10	£1.96
Out Of Centre Stores In Rother							
Local Store, Burwash	£0.00	£0.00	£2.00	£0.08	£0.00	£0.00	£2.07
Local Store, Robertsbridge	£0.06	£0.00	£0.00	£1.89	£0.00	£0.00	£1.95
Local Store, Ticehurst	£0.00	£0.00	£1.73	£0.00	£0.00	£0.00	£1.73
Local Store, Sedlescombe	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.83
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.28	£0.00	£0.00	£0.28
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31	£0.31
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.70	£0.00	£0.70
Local Store, Catsfield	£0.00	£0.40	£0.00	£0.09	£0.00	£0.00	£0.50
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.54	£1.54
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.52	£0.41	£0.93
Local Store, Etchingham	£0.00	£0.00	£0.86	£0.00	£0.00	£0.00	£0.86
Local Store, Hurst Green	£0.00	£0.00	£0.47	£0.09	£0.00	£0.00	£0.57
Local Stores/Village Centres In Rother							
Stores outside the District							
Asda, Eastbourne, Crumbles	£0.71	£3.31	£0.20	£0.08	£0.00	£0.17	£4.47
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.27	£1.56	£0.97	£6.34	£4.07	£2.88	£16.10
Morrison, Hastings, Queens Road	£0.18	£0.46	£0.18	£1.24	£1.55	£2.88	£6.50
Tesco, Hastings, St Leonards, Churchwood Drive	£0.14	£1.21	£0.97	£3.27	£1.80	£1.83	£9.22
Asda Silverhill, Hastings	£0.26	£1.55	£1.16	£4.91	£2.37	£2.27	£12.52
Large Stores Outside Rother with Significant Influence							
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.59	£0.09	£0.67
Budgen, Hawkhurst, Rye Rd	£0.00	£0.09	£1.37	£0.40	£1.21	£0.10	£3.17
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.20	£0.00	£0.09	£0.00	£0.35
Co-op, Eastbourne, Albert Parade	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
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	£3.34	£0.23	£0.00	£0.00	£3.57
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.44	£0.48
Co-op, Polegate, The Centre	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12
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	£0.45	£0.00	£0.00	£0.00	£0.45
Iceland, Hastings, Castle St	£0.00	£0.00	£0.05	£0.00	£0.00	£0.18	£0.23
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	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06
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	£0.05	£0.00	£0.08	£0.30	£0.19	£0.62
Local Store, Hastings	£0.00	£0.00	£0.00	£0.38	£0.37	£0.21	£0.96
Marks & Spencer, Eastbourne	£0.08	£0.36	£0.00	£0.00	£0.00	£0.00	£0.45
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.01	£0.10	£0.11	£0.08	£0.15	£0.10	£0.55
Sainsbury, Ashford, Simon Well Ave	£0.00	£0.05	£0.00	£0.00	£0.25	£0.00	£0.30
Sainsbury, Eastbourne, Arndale Centre	£0.00	£0.33	£0.00	£0.00	£0.04	£0.00	£0.37
Sainsbury, Eastbourne, Hampden Park	£0.00	£0.84	£0.20	£0.08	£0.00	£0.00	£1.12
Sainsbury, New Romney, Dymchurch Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Sainsbury, Tunbridge Wells, Linden Park Rd	£0.00	£0.00	£1.61	£0.15	£0.00	£0.00	£1.77
Sainsbury, Tunbridge Wells, St Johns Road	£0.00	£0.00	£0.50	£0.15	£0.04	£0.14	£0.84
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	£0.09	£0.26	£0.00	£0.10	£0.46
Spar, St Leonards, Kings Rd	£0.09	£0.00	£0.00	£0.00	£0.00	£0.10	£0.19
Tesco, Ashford, Hythe Rd	£0.00	£0.00	£0.00	£0.00	£1.32	£0.00	£1.32
Tesco, Eastbourne, Kingfisher Drive, Langney Shopping Centre	£0.33	£1.11	£0.15	£0.08	£0.00	£0.00	£1.66
Tesco, Eastbourne, Lottbridge Drove	£0.06	£0.49	£0.00	£0.00	£0.00	£0.00	£0.55
Tesco, St Leonards, Silverhill	£0.00	£0.05	£0.00	£0.33	£0.09	£0.22	£0.69
Tesco, Tenterden, Smallhythe Rd	£0.00	£0.00	£0.20	£0.23	£4.10	£0.00	£4.53
Tesco, Tunbridge Wells, Pembury Rd	£0.00	£0.00	£0.64	£0.00	£0.00	£0.00	£0.64
Tesco Express, Heathfield, Station Rd	£0.09	£0.00	£0.05	£0.09	£0.00	£0.00	£0.24
Tesco Express, St Leonards, Fernside Avenue	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.15
Waitrose, Eastbourne, High St	£0.00	£0.30	£0.00	£0.00	£0.00	£0.00	£0.30
Waitrose, Hailsham, Vicarage Field	£0.12	£0.80	£0.05	£0.00	£0.04	£0.00	£1.02
Waitrose, Tenterden, High St	£0.00	£0.00	£0.05	£0.08	£1.09	£0.14	£1.36
Waitrose, Crowborough	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.17
Other	£0.51	£1.60	£3.02	£1.31	£1.95	£1.61	£10.00
Other Stores/Locations Outside Rother							

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

10. Convenience benchmark turnovers 2012 (including commitments)

Store/Location	Sales Area	% Convenience Goods	Convenience Goods Sales Area	Estimated Convenience Goods Sales Density	Convenience Goods Benchmark Turnover
	sqm	%	sqm	£/sqm	£M
Sainsbury, Bexhill, Buckhurst Place	1,467	85%	1,247	£13,190	£16.45
Co-op, Bexhill, Devonshire Rd	206	90%	185	£7,889	£1.46
Co-op, Bexhill, Western Rd	376	95%	357	£7,889	£2.82
Local Store, Bexhill					£3.63
Bexhill Town Centre					£24.36
Budgen/Jempson, Battle, Market Square	650	85%	553	£5,084	£2.81
Co-op, Battle, High St	190	90%	171	£7,889	£1.35
Local Store, Battle					£0.38
Battle Town Centre					£4.53
Jempson/Budgen, Rye, Station Approach	1,400	85%	1,190	£5,084	£6.05
Sainsbury's Rye, Ferry Road	1,727	80%	1,382	£13,141	£18.20
Local Store, Rye					£2.18
Rye Town Centre					£26.43
Lidl, Sidley, Ninfield Rd	890	80%	712	£5,084	£3.62
Local Store, Sidley					£0.71
Co-op, Sidley, Ninfield Rd	215	95%	204	£7,889	£1.61
Sidley District Centre, Bexhill					£5.94
Co-op, Little Common, Cooden Sea Rd	244	95%	232	£7,889	£1.83
Local Store, Little Common					£0.99
Little Common District Centre, Bexhill					£2.82
Aldi, Bexhill, London Rd	1,300	85%	1,105	£9,465	£10.46
Tesco, Bexhill, Collington Ave	221	95%	210	£13,190	£2.77
Jempson, Peasmarsh, Main St	3,425	80%	2,740	£5,084	£13.93
Tesco, Bexhill, Ravenside	2,218	75%	1,664	£13,190	£21.95
M&S, Bexhill, Ravenside	3,121	24%	743	£11,165	£8.31
Tesco Express, Battle, Battle Hill	205	95%	195	£13,190	£2.57
Out Of Centre Stores In Rother					£59.98
Local Store, Burwash					£1.78
Local Store, Robertsbridge					£1.59
Local Stores/Londis, Ticehurst					£1.49
Local Store, Sedlescombe					£0.68
Local Store, Staplecross					£0.23
Local Store, Westfield					£0.27
Local Stores/Spar, Northiam					£0.59
Local Store, Catsfield					£0.42
Local Store, Fairlight					£1.33
Local Stores Winchelsea/Beach					£0.79
Local Store, Etchingham					£0.74
Local Store, Hurst Green					£0.49
Local Stores/Village Centres In Rother					£10.40
Rother District Total					£131.64

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

11. Convenience Capacity

Main Stores and Towns	2012	2013	2018				2023				2028			
	Benchmark	Benchmark	Market Share	Surplus	Benchmark	Market Share	Surplus	Benchmark	Market Share	Surplus	Benchmark	Market Share	Surplus	
	Turnover	Turnover			Turnover			Turnover			Turnover			
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	
Sainsbury, Bexhill, Buckhurst Place	£16.45	£16.49	£23.49	£7.00	£16.65	£22.91	£6.26	£16.82	£24.44	£7.62	£16.99	£26.20	£9.21	
Co-op, Bexhill, Devonshire Rd	£1.46	£1.47	£3.95	£2.49	£1.48	£4.00	£2.52	£1.50	£4.29	£2.79	£1.51	£4.62	£3.11	
Co-op, Bexhill, Western Rd	£2.82	£2.82	£2.47	-£0.35	£2.85	£2.60	-£0.26	£2.88	£2.77	-£0.11	£2.91	£2.97	£0.06	
Local Store, Bexhill	£3.63	£3.63	£3.63	-£0.01	£3.67	£3.82	£0.15	£3.71	£4.09	£0.38	£3.74	£4.40	£0.65	
Bexhill Town Centre	£24.36	£24.41	£33.53	£9.13	£24.65	£33.33	£8.68	£24.90	£35.59	£10.69	£25.15	£38.19	£13.04	
Capacity (sqm net)				733			690			841			1,016	
Aldi, Bexhill, London Rd	£10.46	£10.48	£4.08	-£6.40	£10.58	£3.93	-£6.66	£10.69	£4.18	-£6.51	£10.80	£4.48	-£6.32	
Tesco, Bexhill, Collington Ave	£2.77	£2.77	£2.76	-£0.01	£2.80	£2.88	£0.08	£2.83	£3.06	£0.23	£2.86	£3.27	£0.41	
Tesco, Bexhill, Ravenside	£21.95	£21.99	£25.08	£3.09	£22.21	£23.69	£1.47	£22.43	£25.30	£2.87	£22.66	£27.16	£4.50	
M&S Bexhill, Ravenside					£8.41	£8.71	£0.30	£8.50	£9.30	£0.80	£8.58	£9.97	£1.39	
Out of Centre Bexhill Stores	£35.17	£35.24	£31.92	-£3.32	£44.01	£39.21	-£4.80	£44.45	£41.85	-£2.61	£44.90	£44.89	-£0.01	
Bexhill Total Capacity (£M)				£5.80			£3.88			£8.08			£13.03	
Bexhill Total Capacity (sqm net)				466			309			636			1,015	

Notes
0.2% pa sales efficiency
M&S expected to commence trading in 2016
Average sales density of main foodstore operators (Asda, Morrisons, Sainsbury's, Tesco & Waitrose) used to calculate capacity in sqm. 0.2% pa sales efficiency allowance made.

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

12. Bexhill Convenience Market Share

Option 1: Increased Convenience Retention (90%)	2013	2018	2023	2028
Total Convenience Expenditure Generated in Bexhill home zones (£M)	£90.65	£95.07	£101.30	£108.50
Convenience retention in Bexhill home zones (£M)	£72.34	£77.52	£82.69	£88.66
Convenience retention in Bexhill home zones (%)	80%	82%	82%	82%
Convenience retention in Bexhill town centre (£M)	£33.28	£33.06	£35.30	£37.89
Convenience retention in Bexhill town centre (%)	37%	35%	35%	35%
Scope for increasing town centre market share (%)	10%	8%	8%	8%
Additional capacity (£M)	£9.24	£8.05	£8.48	£8.99
Additional capacity (sqm)	742	640	668	701
Resultant convenience retention in Bexhill home zones (%)	90%	90%	90%	90%
Resultant convenience retention in Bexhill town centre (%)	47%	43%	43%	43%
Option 2: High Convenience Retention (95%)	2013	2018	2023	2028
Total Convenience Expenditure Generated in Bexhill home zones (£M)	£90.65	£95.07	£101.30	£108.50
Convenience retention in Bexhill home zones (£M)	£72.34	£77.52	£82.69	£88.66
Convenience retention in Bexhill home zones (%)	80%	82%	82%	82%
Convenience retention in Bexhill town centre (£M)	£33.28	£33.06	£35.30	£37.89
Convenience retention in Bexhill town centre (%)	37%	35%	35%	35%
Scope for increasing town centre market share (%)	15%	13%	13%	13%
Additional capacity (£M)	£13.77	£12.80	£13.55	£14.42
Additional capacity (sqm)	1,106	1,018	1,066	1,124
Resultant convenience retention in Bexhill home zones (%)	95%	95%	95%	95%
Resultant convenience retention in Bexhill town centre (%)	52%	48%	48%	48%

Notes

Reduction in town centre market share between 2013 and 2018 relates to the impact of commitments

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016

Clothing & Footwear	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	26.28%	16.45%	0.00%	2.89%	0.00%	0.00%	10.69%	£2.32	£2.84	£0.00	£0.24	£0.00	£0.00	£5.40	£2.78	£3.28	£0.00	£0.29	£0.00	£0.00	£6.35
Battle - Town Centre	0.00%	0.75%	1.31%	8.78%	0.00%	1.62%	1.62%	£0.00	£0.13	£0.08	£0.74	£0.00	£0.07	£1.03	£0.00	£0.15	£0.10	£0.88	£0.00	£0.08	£1.20
Rye - Town Centre	0.00%	0.00%	0.00%	0.96%	8.62%	0.00%	1.62%	£0.00	£0.00	£0.00	£0.08	£0.73	£0.00	£0.81	£0.00	£0.00	£0.00	£0.10	£0.85	£0.00	£0.95
Ravenside Retail Park, Bexhill	0.64%	1.18%	0.00%	0.00%	0.77%	1.62%	0.76%	£0.06	£0.20	£0.00	£0.00	£0.07	£0.07	£0.39	£0.07	£0.23	£0.00	£0.00	£0.08	£0.08	£0.46
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	0.43%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
Little Common - Local Centre	0.00%	0.43%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
Robertsbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	26.91%	19.23%	1.31%	12.63%	9.39%	3.24%	14.90%	£2.38	£3.31	£0.08	£1.07	£0.80	£0.14	£7.78	£2.85	£3.83	£0.10	£1.26	£0.93	£0.16	£9.13
Eastbourne - Town Centre	54.57%	57.05%	7.87%	15.52%	3.65%	14.47%	33.69%	£4.82	£9.83	£0.50	£1.31	£0.31	£0.62	£17.40	£5.78	£11.37	£0.58	£1.55	£0.36	£0.72	£20.37
Hastings - Town Centre	14.47%	16.88%	9.18%	35.97%	49.06%	64.47%	27.75%	£1.28	£2.91	£0.58	£3.05	£4.16	£2.78	£14.76	£1.53	£3.37	£0.67	£3.60	£4.85	£3.21	£17.23
Tunbridge Wells - Town Centre	0.00%	1.50%	75.08%	24.30%	9.39%	3.24%	12.85%	£0.00	£0.26	£4.77	£2.06	£0.80	£0.14	£8.02	£0.00	£0.30	£5.51	£2.43	£0.93	£0.16	£9.33
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.96%	10.83%	3.24%	2.27%	£0.00	£0.00	£0.00	£0.08	£0.92	£0.14	£1.14	£0.00	£0.00	£0.00	£0.10	£1.07	£0.16	£1.33
Ashford - Town Centre	0.00%	0.00%	0.00%	0.96%	1.44%	0.00%	0.43%	£0.00	£0.00	£0.00	£0.08	£0.12	£0.00	£0.20	£0.00	£0.00	£0.00	£0.10	£0.14	£0.00	£0.24
Bluewater Shopping Centre	0.00%	0.75%	0.00%	0.96%	1.44%	1.62%	0.76%	£0.00	£0.13	£0.00	£0.08	£0.12	£0.07	£0.40	£0.00	£0.15	£0.00	£0.10	£0.14	£0.08	£0.47
Brighton - Town Centre	0.64%	0.75%	0.00%	1.93%	0.77%	0.00%	0.76%	£0.06	£0.13	£0.00	£0.16	£0.07	£0.00	£0.41	£0.07	£0.15	£0.00	£0.19	£0.08	£0.00	£0.49
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.77%	1.62%	0.22%	£0.00	£0.00	£0.00	£0.00	£0.07	£0.07	£0.14	£0.00	£0.00	£0.00	£0.00	£0.08	£0.08	£0.16
Heathfield - Town Centre	0.00%	0.00%	2.62%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.19
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	2.77%	0.43%	1.31%	1.93%	3.65%	3.24%	1.94%	£0.24	£0.07	£0.08	£0.16	£0.31	£0.14	£1.01	£0.29	£0.09	£0.10	£0.19	£0.36	£0.16	£1.19
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.64%	0.00%	0.00%	1.93%	0.77%	0.00%	0.54%	£0.06	£0.00	£0.00	£0.16	£0.07	£0.00	£0.29	£0.07	£0.00	£0.00	£0.19	£0.08	£0.00	£0.34
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.31%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.10
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.77%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.15
St Leonards - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tenterden - Town Centre	0.00%	0.00%	0.00%	0.96%	5.08%	0.00%	0.97%	£0.00	£0.00	£0.00	£0.08	£0.43	£0.00	£0.51	£0.00	£0.00	£0.00	£0.10	£0.50	£0.00	£0.60
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.43%	1.31%	0.00%	0.00%	1.62%	0.43%	£0.00	£0.07	£0.08	£0.00	£0.00	£0.07	£0.23	£0.00	£0.09	£0.10	£0.00	£0.00	£0.08	£0.26
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.00%	1.50%	0.00%	0.96%	0.77%	0.00%	0.76%	£0.00	£0.26	£0.00	£0.08	£0.07	£0.00	£0.41	£0.00	£0.30	£0.00	£0.10	£0.08	£0.00	£0.47
Tunbridge Wells, Longfield Retail Park	0.00%	0.75%	0.00%	0.96%	0.00%	1.62%	0.54%	£0.00	£0.13	£0.00	£0.08	£0.00	£0.07	£0.28	£0.00	£0.15	£0.00	£0.10	£0.00	£0.08	£0.33
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Canterbury	0.00%	0.00%	0.00%	0.00%	2.21%	1.62%	0.54%	£0.00	£0.00	£0.00	£0.00	£0.19	£0.07	£0.26	£0.00	£0.00	£0.00	£0.00	£0.22	£0.08	£0.30
Others	4.04%	5.34%	6.56%	11.56%	28.51%	14.58%	10.80%	£0.36	£0.92	£0.42	£0.98	£2.42	£0.63	£5.72	£0.43	£1.06	£0.48	£1.16	£2.82	£0.73	£6.68

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Chemist & Personal Care																					
Bexhill - Town Centre	66.63%	51.22%	1.23%	3.64%	1.32%	1.52%	30.40%	£4.09	£6.92	£0.05	£0.21	£0.07	£0.04	£11.39	£4.90	£8.00	£0.06	£0.25	£0.09	£0.05	£13.35
Battle - Town Centre	0.60%	4.68%	0.00%	33.06%	0.00%	1.52%	6.08%	£0.04	£0.63	£0.00	£1.93	£0.00	£0.04	£2.65	£0.04	£0.73	£0.00	£2.29	£0.00	£0.05	£3.11
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	57.01%	1.52%	10.44%	£0.00	£0.00	£0.00	£0.00	£3.15	£0.04	£3.20	£0.00	£0.00	£0.00	£0.00	£3.67	£0.05	£3.72
Ravenside Retail Park, Bexhill	18.19%	10.49%	1.23%	0.91%	0.00%	0.00%	7.09%	£1.12	£1.42	£0.05	£0.05	£0.00	£0.00	£2.64	£1.34	£1.64	£0.06	£0.06	£0.00	£0.00	£3.10
Tesco, Ravenside Retail Park	8.84%	5.80%	1.23%	0.91%	0.00%	0.00%	3.75%	£0.54	£0.78	£0.05	£0.05	£0.00	£0.00	£1.43	£0.65	£0.91	£0.06	£0.06	£0.00	£0.00	£1.68
Sidley - Local Centre	1.31%	5.40%	0.00%	0.00%	0.00%	0.00%	2.03%	£0.08	£0.73	£0.00	£0.00	£0.00	£0.00	£0.81	£0.10	£0.84	£0.00	£0.00	£0.00	£0.00	£0.94
Little Common - Local Centre	0.00%	9.37%	0.00%	0.00%	0.00%	0.00%	3.04%	£0.00	£1.27	£0.00	£0.00	£0.00	£0.00	£1.27	£0.00	£1.46	£0.00	£0.00	£0.00	£0.00	£1.46
Robertsbridge	0.00%	0.00%	0.00%	13.75%	0.00%	0.00%	1.82%	£0.00	£0.00	£0.00	£0.80	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£0.95	£0.00	£0.00	£0.95
Peammarsh	0.00%	0.00%	1.23%	0.00%	1.93%	0.00%	0.51%	£0.00	£0.00	£0.05	£0.00	£0.11	£0.00	£0.16	£0.00	£0.00	£0.06	£0.00	£0.12	£0.00	£0.19
Ticehurst	0.00%	0.00%	19.79%	0.00%	0.00%	0.00%	1.93%	£0.00	£0.00	£0.88	£0.00	£0.00	£0.00	£0.88	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£1.02
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	95.58%	86.97%	24.72%	52.28%	60.26%	4.57%	67.07%	£5.86	£11.75	£1.10	£3.06	£3.33	£0.13	£25.23	£7.03	£13.59	£1.27	£3.61	£3.88	£0.15	£29.53
Eastbourne - Town Centre	1.31%	3.97%	1.23%	4.55%	1.32%	1.52%	2.63%	£0.08	£0.54	£0.05	£0.27	£0.07	£0.04	£1.05	£0.10	£0.62	£0.06	£0.31	£0.09	£0.05	£1.23
Hastings - Town Centre	1.31%	4.68%	6.15%	16.58%	21.65%	51.63%	12.36%	£0.08	£0.63	£0.27	£0.97	£1.20	£1.47	£4.63	£0.10	£0.73	£0.32	£1.15	£1.39	£1.70	£5.39
Tunbridge Wells - Town Centre	0.00%	0.00%	33.33%	5.56%	0.61%	0.00%	4.05%	£0.00	£0.00	£1.48	£0.33	£0.03	£0.00	£1.84	£0.00	£0.00	£1.71	£0.38	£0.04	£0.00	£2.14
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	1.52%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.05
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.61%	0.00%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Brighton - Town Centre	0.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Heathfield - Town Centre	0.00%	0.00%	13.64%	0.91%	1.93%	0.00%	1.82%	£0.00	£0.00	£0.61	£0.05	£0.11	£0.00	£0.77	£0.00	£0.00	£0.70	£0.06	£0.12	£0.00	£0.89
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Morrisons, Hastings	0.00%	0.00%	1.23%	0.00%	0.00%	3.15%	0.41%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.09	£0.14	£0.00	£0.00	£0.06	£0.00	£0.00	£0.10	£0.17
Sainsburys, Hampden Park, Eastbourne	0.00%	0.71%	0.00%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Sainsburys, John McAdam Way, St Leonards, Hastings	0.60%	0.71%	2.46%	13.75%	3.25%	15.65%	4.15%	£0.04	£0.10	£0.11	£0.80	£0.18	£0.45	£1.67	£0.04	£0.11	£0.13	£0.95	£0.21	£0.52	£1.96
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	2.46%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.13	£0.00	£0.00	£0.00	£0.13
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.71%	0.00%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
St Leonards - Town Centre	0.00%	0.00%	1.23%	0.00%	0.61%	0.00%	0.20%	£0.00	£0.00	£0.05	£0.00	£0.03	£0.00	£0.09	£0.00	£0.00	£0.06	£0.00	£0.04	£0.00	£0.10
Tenterden - Town Centre	0.00%	0.00%	1.23%	0.00%	7.22%	0.00%	1.42%	£0.00	£0.00	£0.05	£0.00	£0.40	£0.00	£0.45	£0.00	£0.00	£0.06	£0.00	£0.46	£0.00	£0.53
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.60%	0.41%	3.69%	3.64%	0.61%	10.98%	2.03%	£0.04	£0.06	£0.16	£0.21	£0.03	£0.31	£0.82	£0.04	£0.06	£0.19	£0.25	£0.04	£0.36	£0.95
Tesco, Lottbridge Drove, Ebne	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06
Tesco, Tunbridge Wells	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.06
Other	0.00%	1.43%	7.38%	2.73%	1.93%	10.98%	2.74%	£0.00	£0.19	£0.33	£0.16	£0.11	£0.31	£1.10	£0.00	£0.22	£0.38	£0.19	£0.12	£0.36	£1.28
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Canterbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Others	1.81%	4.38%	34.56%	21.03%	16.16%	42.28%	13.88%	£0.11	£0.59	£1.54	£1.23	£0.89	£1.21	£5.57	£0.13	£0.68	£1.78	£1.45	£1.04	£1.39	£6.48

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Market shares	Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Books, Stationery, Cards, DVDs, CDs etc														
Bexhill - Town Centre	57.87%	53.31%	0.00%	3.53%	0.00%	0.00%	29.82%	£0.93	£1.84	£0.00	£0.06	£0.00	£0.00	£2.83
Battle - Town Centre	4.98%	3.37%	0.00%	21.41%	0.00%	1.81%	4.97%	£0.08	£0.12	£0.00	£0.38	£0.00	£0.02	£0.60
Rye - Town Centre	0.81%	0.00%	0.00%	1.22%	37.00%	0.00%	6.51%	£0.01	£0.00	£0.00	£0.02	£0.68	£0.00	£0.71
Ravenside Retail Park, Bexhill	4.98%	3.03%	0.00%	0.00%	0.00%	0.00%	2.01%	£0.08	£0.10	£0.00	£0.00	£0.00	£0.00	£0.18
Tesco, Ravenside Retail Park	5.79%	5.16%	0.00%	1.22%	0.00%	0.00%	2.96%	£0.09	£0.18	£0.00	£0.02	£0.00	£0.00	£0.29
Sidley - Local Centre	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.47%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04
Little Common - Local Centre	0.00%	5.16%	0.00%	0.00%	0.00%	0.00%	1.78%	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.18
Robertsbridge	0.00%	0.00%	1.72%	4.74%	0.00%	0.00%	0.71%	£0.00	£0.00	£0.02	£0.09	£0.00	£0.00	£0.11
Peasmarsh	0.00%	0.00%	0.00%	0.00%	5.38%	0.00%	0.95%	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.10
Ticehurst	0.00%	0.00%	5.03%	0.00%	0.90%	0.00%	0.59%	£0.00	£0.00	£0.07	£0.00	£0.02	£0.00	£0.09
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	74.42%	71.27%	6.75%	32.12%	43.28%	1.81%	50.77%	£1.20	£2.46	£0.09	£0.58	£0.79	£0.02	£5.13
Eastbourne - Town Centre	17.36%	16.16%	1.72%	9.49%	0.00%	3.61%	10.53%	£0.28	£0.56	£0.02	£0.17	£0.00	£0.03	£1.06
Hastings - Town Centre	4.98%	5.16%	11.90%	32.24%	33.42%	87.36%	20.59%	£0.08	£0.18	£0.16	£0.58	£0.61	£0.80	£2.41
Tunbridge Wells - Town Centre	0.00%	0.45%	55.95%	10.71%	2.69%	0.00%	6.86%	£0.00	£0.02	£0.77	£0.19	£0.05	£0.00	£1.03
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	1.79%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Bluewater Shopping Centre	0.00%	0.00%	0.00%	1.22%	0.90%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.02	£0.02	£0.00	£0.04
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Heathfield - Town Centre	0.00%	0.00%	6.75%	0.00%	0.00%	0.00%	0.59%	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£0.09
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.90%	0.00%	0.00%	1.79%	0.00%	0.59%	£0.00	£0.03	£0.00	£0.00	£0.03	£0.00	£0.06
Morrisons, Hastings	0.00%	0.90%	0.00%	1.22%	0.00%	0.00%	0.47%	£0.00	£0.03	£0.00	£0.02	£0.00	£0.00	£0.05
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.81%	0.90%	0.00%	3.53%	0.00%	0.00%	0.95%	£0.01	£0.03	£0.00	£0.06	£0.00	£0.00	£0.11
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.45%	0.00%	0.00%	0.00%	0.00%	0.12%	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.02
St Leonards - Town Centre	0.00%	0.00%	0.00%	0.00%	1.79%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Tenterden - Town Centre	1.62%	0.00%	0.00%	1.22%	8.07%	0.00%	1.78%	£0.03	£0.00	£0.00	£0.02	£0.15	£0.00	£0.20
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	2.69%	0.00%	0.47%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	1.72%	3.53%	0.90%	5.42%	1.18%	£0.00	£0.00	£0.02	£0.06	£0.02	£0.05	£0.15
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.81%	2.13%	6.75%	3.53%	2.69%	1.81%	2.60%	£0.01	£0.07	£0.09	£0.06	£0.05	£0.02	£0.31
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	0.00%	1.22%	0.00%	0.00%	0.12%	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.02
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Wadhurst	0.00%	0.00%	8.47%	0.00%	0.00%	0.00%	0.71%	£0.00	£0.00	£0.12	£0.00	£0.00	£0.00	£0.12
Asda, Eastbourne	0.00%	1.68%	0.00%	0.00%	0.00%	0.00%	0.59%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06
Others	3.24%	6.96%	23.68%	15.45%	20.61%	7.22%	11.24%	£0.05	£0.24	£0.33	£0.28	£0.38	£0.07	£1.34
	£0.06	£0.28	£0.38	£0.33	£0.44	£0.08	£1.56							

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares								Implied turnover 2011								Implied turnover 2016							
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total		Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total		Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	
Recreation & Leisure Goods																								
Bexhill - Town Centre	48.50%	31.64%	0.00%	4.19%	0.00%	2.32%	19.59%		£2.38	£3.30	£0.00	£0.23	£0.00	£0.07	£5.99		£2.85	£3.82	£0.00	£0.28	£0.00	£0.08	£7.03	
Battle - Town Centre	0.00%	2.10%	0.00%	6.98%	0.00%	2.32%	1.81%		£0.00	£0.22	£0.00	£0.39	£0.00	£0.07	£0.68		£0.00	£0.25	£0.00	£0.46	£0.00	£0.08	£0.80	
Rye - Town Centre	0.00%	0.00%	0.00%	1.40%	27.25%	4.52%	5.66%		£0.00	£0.00	£0.00	£0.08	£1.63	£0.14	£1.85		£0.00	£0.00	£0.00	£0.09	£1.89	£0.16	£2.15	
Ravenside Retail Park, Bexhill	6.12%	4.31%	0.00%	1.40%	0.00%	0.00%	2.60%		£0.30	£0.45	£0.00	£0.08	£0.00	£0.00	£0.83		£0.36	£0.52	£0.00	£0.09	£0.00	£0.00	£0.97	
Tesco, Ravenside Retail Park	1.00%	1.11%	0.00%	0.00%	0.00%	0.00%	0.57%		£0.05	£0.12	£0.00	£0.00	£0.00	£0.00	£0.16		£0.06	£0.13	£0.00	£0.00	£0.00	£0.00	£0.19	
Sidley - Local Centre	0.00%	1.11%	0.00%	0.00%	0.00%	0.00%	0.34%		£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.12		£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.13	
Little Common - Local Centre	0.00%	0.55%	0.00%	0.00%	0.00%	0.00%	0.23%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06		£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	
Robertbridge	0.00%	0.55%	1.71%	4.19%	0.00%	0.00%	0.91%		£0.00	£0.06	£0.07	£0.23	£0.00	£0.00	£0.37		£0.00	£0.07	£0.09	£0.28	£0.00	£0.00	£0.43	
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Northiam	0.00%	0.00%	0.00%	0.00%	2.86%	0.00%	0.57%		£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.17		£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.20	
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Rother District	55.62%	41.37%	1.71%	18.14%	30.11%	9.17%	32.28%		£2.73	£4.32	£0.07	£1.02	£1.80	£0.29	£10.22		£3.27	£4.99	£0.09	£1.20	£2.09	£0.33	£11.98	
Eastbourne - Town Centre	25.25%	37.61%	1.71%	16.63%	2.86%	6.85%	20.16%		£1.24	£3.92	£0.07	£0.93	£0.17	£0.22	£6.56		£1.49	£4.54	£0.09	£1.10	£0.20	£0.25	£7.66	
Hastings - Town Centre	14.13%	12.39%	10.39%	36.05%	35.71%	56.60%	23.33%		£0.69	£1.29	£0.45	£2.02	£2.13	£1.79	£8.37		£0.83	£1.50	£0.52	£2.39	£2.48	£2.06	£9.78	
Tunbridge Wells - Town Centre	0.00%	1.11%	56.85%	18.02%	3.74%	6.85%	9.74%		£0.00	£0.12	£2.46	£1.01	£0.22	£0.22	£4.03		£0.00	£0.13	£2.84	£1.19	£0.26	£0.25	£4.68	
Ashford - Designer Outlet Village	0.00%	0.00%	1.71%	0.00%	4.73%	4.52%	1.36%		£0.00	£0.00	£0.07	£0.00	£0.28	£0.14	£0.50		£0.00	£0.00	£0.09	£0.00	£0.33	£0.16	£0.58	
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	8.46%	0.00%	1.59%		£0.00	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50		£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.59	
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Brighton - Town Centre	0.00%	1.66%	0.00%	0.00%	0.99%	0.00%	0.68%		£0.00	£0.17	£0.00	£0.00	£0.06	£0.00	£0.23		£0.00	£0.20	£0.00	£0.00	£0.07	£0.00	£0.27	
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Heathfield - Town Centre	0.00%	0.00%	10.39%	1.40%	0.00%	0.00%	1.25%		£0.00	£0.00	£0.45	£0.08	£0.00	£0.00	£0.53		£0.00	£0.00	£0.52	£0.09	£0.00	£0.00	£0.61	
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
London	4.00%	0.00%	1.71%	0.00%	1.87%	4.52%	1.59%		£0.20	£0.00	£0.07	£0.00	£0.11	£0.14	£0.52		£0.24	£0.00	£0.09	£0.00	£0.13	£0.16	£0.62	
Morrisons, Hastings	0.00%	0.55%	0.00%	0.00%	0.00%	2.32%	0.34%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.07	£0.13		£0.00	£0.07	£0.00	£0.00	£0.00	£0.08	£0.15	
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	1.40%	0.00%	2.32%	0.34%		£0.00	£0.00	£0.00	£0.08	£0.00	£0.07	£0.15		£0.00	£0.00	£0.00	£0.09	£0.00	£0.08	£0.18	
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	2.10%	0.00%	0.00%	0.00%	0.00%	0.68%		£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22		£0.00	£0.25	£0.00	£0.00	£0.00	£0.25	£0.25	
St Leonards - Town Centre	0.00%	0.00%	1.71%	0.00%	0.99%	0.00%	0.34%		£0.00	£0.00	£0.07	£0.00	£0.06	£0.00	£0.13		£0.00	£0.00	£0.09	£0.00	£0.07	£0.00	£0.15	
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.40%	4.73%	0.00%	1.02%		£0.00	£0.00	£0.00	£0.08	£0.28	£0.00	£0.36		£0.00	£0.00	£0.00	£0.09	£0.33	£0.00	£0.42	
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.99%	0.00%	0.23%		£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06		£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.07	
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	1.71%	0.00%	0.99%	2.32%	0.57%		£0.00	£0.00	£0.07	£0.00	£0.06	£0.07	£0.21		£0.00	£0.00	£0.09	£0.00	£0.07	£0.08	£0.24	
Tesco, Lottbridge Drove, Ebne	0.00%	0.55%	0.00%	0.00%	0.00%	0.00%	0.23%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06		£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Other	0.00%	2.65%	12.10%	5.58%	2.86%	4.52%	3.74%		£0.00	£0.28	£0.52	£0.31	£0.17	£0.14	£1.43		£0.00	£0.32	£0.61	£0.37	£0.20	£0.16	£1.66	
Tunbridge Wells, Longfield Retail Park	1.00%	0.00%	0.00%	1.40%	0.99%	0.00%	0.57%		£0.05	£0.00	£0.00	£0.08	£0.06	£0.00	£0.19		£0.06	£0.00	£0.00	£0.09	£0.07	£0.00	£0.22	
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Others	5.01%	7.52%	29.34%	11.16%	27.58%	20.54%	14.50%		£0.25	£0.78	£1.27	£0.63	£1.65	£0.65	£5.22		£0.29	£0.91	£1.47	£0.74	£1.92	£0.75	£6.07	

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
China, Glass & Home Textiles																					
Bexhill - Town Centre	19.96%	12.62%	0.00%	1.14%	0.00%	0.00%	7.91%	£0.64	£0.89	£0.00	£0.04	£0.00	£0.00	£1.57	£0.77	£1.02	£0.00	£0.05	£0.00	£0.00	£1.84
Battle - Town Centre	1.76%	2.15%	1.47%	19.57%	0.00%	3.48%	4.06%	£0.06	£0.15	£0.04	£0.68	£0.00	£0.06	£0.98	£0.07	£0.17	£0.04	£0.80	£0.00	£0.07	£1.15
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	10.49%	0.00%	1.82%	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.39	£0.00	£0.39
Ravenside Retail Park, Bexhill	2.65%	3.49%	0.00%	0.00%	0.00%	0.00%	1.60%	£0.09	£0.24	£0.00	£0.00	£0.00	£0.00	£0.33	£0.10	£0.28	£0.00	£0.00	£0.00	£0.00	£0.39
Tesco, Ravenside Retail Park	5.18%	5.64%	0.00%	0.00%	0.00%	0.00%	2.88%	£0.17	£0.40	£0.00	£0.00	£0.00	£0.00	£0.56	£0.20	£0.46	£0.00	£0.00	£0.00	£0.00	£0.66
Sidley - Local Centre	0.00%	1.33%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Little Common - Local Centre	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	29.55%	25.64%	1.47%	20.70%	10.49%	3.48%	18.80%	£0.95	£1.80	£0.04	£0.72	£0.33	£0.06	£3.90	£1.14	£2.08	£0.04	£0.85	£0.39	£0.07	£4.57
Eastbourne - Town Centre	41.68%	44.92%	2.94%	13.77%	1.77%	5.16%	25.32%	£1.34	£3.15	£0.08	£0.48	£0.06	£0.08	£5.19	£1.61	£3.65	£0.09	£0.56	£0.07	£0.10	£6.07
Hastings - Town Centre	21.72%	15.69%	11.78%	29.92%	50.77%	67.33%	28.63%	£0.70	£1.10	£0.30	£1.03	£1.61	£1.11	£5.86	£0.84	£1.27	£0.35	£1.22	£1.87	£1.28	£6.84
Tunbridge Wells - Town Centre	0.88%	1.74%	58.78%	16.15%	4.42%	5.16%	10.04%	£0.03	£0.12	£1.52	£0.56	£0.14	£0.08	£2.45	£0.03	£0.14	£1.75	£0.66	£0.16	£0.10	£2.85
Ashford - Designer Outlet Village	0.00%	0.41%	2.94%	1.14%	3.53%	3.48%	1.50%	£0.00	£0.03	£0.08	£0.04	£0.11	£0.06	£0.31	£0.00	£0.03	£0.09	£0.05	£0.13	£0.07	£0.36
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	7.84%	1.69%	1.50%	£0.00	£0.00	£0.00	£0.00	£0.25	£0.03	£0.28	£0.00	£0.00	£0.00	£0.00	£0.29	£0.03	£0.32
Bluewater Shopping Centre	0.00%	0.92%	1.47%	1.14%	3.53%	1.69%	1.39%	£0.00	£0.06	£0.04	£0.04	£0.11	£0.03	£0.28	£0.00	£0.07	£0.04	£0.05	£0.13	£0.03	£0.33
Brighton - Town Centre	0.88%	0.92%	0.00%	2.28%	0.00%	0.00%	0.75%	£0.03	£0.06	£0.00	£0.08	£0.00	£0.00	£0.17	£0.03	£0.07	£0.00	£0.09	£0.00	£0.00	£0.20
Hailsham - Town Centre	0.00%	0.92%	0.00%	0.00%	0.88%	0.00%	0.43%	£0.00	£0.06	£0.00	£0.00	£0.03	£0.00	£0.09	£0.00	£0.07	£0.00	£0.00	£0.03	£0.00	£0.11
Heathfield - Town Centre	0.00%	0.00%	5.89%	0.00%	0.00%	0.00%	0.64%	£0.00	£0.00	£0.15	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.18
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	1.76%	1.33%	0.00%	1.14%	4.42%	3.48%	1.92%	£0.06	£0.09	£0.00	£0.04	£0.14	£0.06	£0.39	£0.07	£0.11	£0.00	£0.05	£0.16	£0.07	£0.45
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	5.80%	0.00%	3.48%	1.07%	£0.00	£0.00	£0.00	£0.20	£0.00	£0.06	£0.26	£0.00	£0.00	£0.00	£0.24	£0.00	£0.07	£0.30
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.47%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
St Leonards - Town Centre	0.88%	0.00%	0.00%	0.00%	1.77%	0.00%	0.43%	£0.03	£0.00	£0.00	£0.00	£0.06	£0.00	£0.08	£0.03	£0.00	£0.00	£0.00	£0.07	£0.00	£0.10
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.14%	4.42%	0.00%	0.85%	£0.00	£0.00	£0.00	£0.04	£0.14	£0.00	£0.18	£0.00	£0.00	£0.00	£0.05	£0.16	£0.00	£0.21
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.88%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Tesco, Churchwood Drive, St Leonards	0.00%	0.92%	1.47%	1.14%	0.00%	1.69%	0.75%	£0.00	£0.06	£0.04	£0.04	£0.00	£0.03	£0.17	£0.00	£0.07	£0.04	£0.05	£0.00	£0.03	£0.20
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	1.76%	2.67%	2.94%	4.55%	3.53%	1.69%	2.88%	£0.06	£0.19	£0.08	£0.16	£0.11	£0.03	£0.62	£0.07	£0.22	£0.09	£0.19	£0.13	£0.03	£0.72
Tunbridge Wells, Longfield Retail Park	0.00%	0.41%	2.94%	0.00%	1.77%	0.00%	0.75%	£0.00	£0.03	£0.08	£0.00	£0.06	£0.00	£0.16	£0.00	£0.03	£0.09	£0.00	£0.07	£0.00	£0.19
Tonbridge Town Centre	0.00%	0.00%	1.47%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Lakeside Shopping Centre/Retail Park	0.88%	1.33%	4.42%	1.14%	0.00%	0.00%	1.18%	£0.03	£0.09	£0.11	£0.04	£0.00	£0.00	£0.28	£0.03	£0.11	£0.13	£0.05	£0.00	£0.00	£0.32
Asda, Eastbourne	0.00%	1.74%	0.00%	0.00%	0.00%	1.69%	0.75%	£0.00	£0.12	£0.00	£0.00	£0.00	£0.03	£0.15	£0.00	£0.14	£0.00	£0.00	£0.00	£0.03	£0.17
Others	6.17%	12.00%	25.03%	19.46%	32.56%	18.86%	17.20%	£0.20	£0.84	£0.65	£0.67	£1.03	£0.31	£3.70	£0.24	£0.97	£0.75	£0.80	£1.20	£0.36	£4.31

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Household Appliances	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	27.36%	20.26%	1.39%	12.00%	3.15%	11.30%	15.02%	£0.45	£0.66	£0.01	£0.16	£0.05	£0.09	£1.43	£0.55	£0.76	£0.01	£0.19	£0.06	£0.10	£1.68
Battle - Town Centre	0.00%	0.76%	0.00%	7.58%	0.00%	0.00%	1.23%	£0.00	£0.02	£0.00	£0.10	£0.00	£0.00	£0.13	£0.00	£0.03	£0.00	£0.12	£0.00	£0.00	£0.15
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	3.15%	0.00%	0.56%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
Ravenside Retail Park, Bexhill	62.54%	48.86%	2.77%	18.53%	15.50%	32.30%	36.10%	£1.04	£1.59	£0.03	£0.25	£0.24	£0.26	£3.40	£1.25	£1.84	£0.03	£0.30	£0.27	£0.30	£3.99
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	2.17%	2.82%	0.00%	0.00%	0.00%	0.00%	1.35%	£0.04	£0.09	£0.00	£0.00	£0.00	£0.00	£0.13	£0.04	£0.11	£0.00	£0.00	£0.00	£0.00	£0.15
Little Common - Local Centre	0.00%	7.91%	0.00%	0.00%	0.00%	1.60%	2.80%	£0.00	£0.26	£0.00	£0.00	£0.00	£0.01	£0.27	£0.00	£0.30	£0.00	£0.00	£0.00	£0.01	£0.31
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	3.15%	0.00%	0.56%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	92.07%	80.61%	4.16%	38.11%	24.94%	45.20%	57.62%	£1.53	£2.63	£0.04	£0.51	£0.38	£0.36	£5.45	£1.83	£3.04	£0.04	£0.61	£0.44	£0.41	£6.39
Eastbourne - Town Centre	2.82%	5.20%	1.39%	6.53%	1.57%	0.00%	3.48%	£0.05	£0.17	£0.01	£0.09	£0.02	£0.00	£0.34	£0.06	£0.20	£0.01	£0.10	£0.03	£0.00	£0.40
Hastings - Town Centre	2.17%	6.72%	1.39%	31.59%	43.46%	33.90%	17.04%	£0.04	£0.22	£0.01	£0.43	£0.66	£0.27	£1.62	£0.04	£0.25	£0.01	£0.50	£0.77	£0.31	£1.90
Tunbridge Wells - Town Centre	0.00%	0.00%	19.77%	1.05%	0.73%	0.00%	2.13%	£0.00	£0.00	£0.18	£0.01	£0.01	£0.00	£0.21	£0.00	£0.00	£0.21	£0.02	£0.01	£0.00	£0.24
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	1.57%	0.00%	0.22%	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	5.45%	0.00%	0.90%	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.10
Bluewater Shopping Centre	0.00%	0.00%	1.39%	1.05%	0.73%	0.00%	0.45%	£0.00	£0.00	£0.01	£0.01	£0.01	£0.00	£0.04	£0.00	£0.00	£0.01	£0.02	£0.01	£0.00	£0.04
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	0.00%	1.05%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.01	£0.00	£0.00	£0.01	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.02
Heathfield - Town Centre	0.00%	1.19%	28.21%	5.48%	0.73%	1.60%	4.04%	£0.00	£0.04	£0.26	£0.07	£0.01	£0.01	£0.40	£0.00	£0.04	£0.30	£0.09	£0.01	£0.01	£0.46
Langney Centre, Eastbourne	0.76%	0.76%	0.00%	0.00%	0.00%	0.00%	0.45%	£0.01	£0.02	£0.00	£0.00	£0.00	£0.00	£0.04	£0.02	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04
London	0.00%	0.00%	0.00%	0.00%	2.30%	0.00%	0.45%	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.76%	0.00%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
St Leonards - Town Centre	1.41%	4.33%	0.00%	7.58%	9.32%	14.50%	5.49%	£0.02	£0.14	£0.00	£0.10	£0.14	£0.12	£0.52	£0.03	£0.16	£0.00	£0.12	£0.17	£0.13	£0.61
Tenterden - Town Centre	0.00%	0.00%	0.00%	0.00%	2.30%	0.00%	0.45%	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.43%	0.00%	0.00%	0.73%	1.60%	0.45%	£0.00	£0.01	£0.00	£0.00	£0.00	£0.01	£0.04	£0.00	£0.02	£0.00	£0.00	£0.01	£0.01	£0.04
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.76%	0.00%	2.77%	0.00%	1.57%	3.20%	0.90%	£0.01	£0.00	£0.03	£0.00	£0.02	£0.03	£0.09	£0.02	£0.00	£0.03	£0.00	£0.03	£0.03	£0.10
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	36.65%	6.53%	3.87%	0.00%	4.93%	£0.00	£0.00	£0.34	£0.09	£0.06	£0.00	£0.49	£0.00	£0.00	£0.39	£0.10	£0.07	£0.00	£0.57
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hawkhurst	0.00%	0.00%	4.28%	1.05%	0.73%	0.00%	0.67%	£0.00	£0.00	£0.04	£0.01	£0.01	£0.00	£0.06	£0.00	£0.00	£0.05	£0.02	£0.01	£0.00	£0.08
Others	2.93%	7.48%	73.29%	22.73%	29.30%	20.90%	19.73%	£0.05	£0.24	£0.68	£0.31	£0.45	£0.17	£1.89	£0.06	£0.28	£0.79	£0.36	£0.52	£0.19	£2.20

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Audio Visual Equipment																					
Bexhill - Town Centre	20.37%	22.58%	1.62%	13.98%	5.24%	12.70%	15.46%	£1.09	£2.16	£0.05	£0.58	£0.23	£0.27	£4.37	£1.30	£2.49	£0.05	£0.69	£0.27	£0.31	£5.12
Battle - Town Centre	0.75%	0.00%	0.00%	4.62%	0.00%	0.00%	0.69%	£0.04	£0.00	£0.00	£0.19	£0.00	£0.00	£0.23	£0.05	£0.00	£0.00	£0.23	£0.00	£0.00	£0.27
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	3.54%	0.00%	0.57%	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.18
Ravenside Retail Park, Bexhill	66.27%	46.38%	3.11%	17.42%	19.15%	38.23%	37.57%	£3.54	£4.43	£0.09	£0.72	£0.85	£0.81	£10.44	£4.24	£5.12	£0.10	£0.85	£0.99	£0.94	£12.25
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	1.51%	4.56%	0.00%	1.18%	0.00%	0.00%	2.06%	£0.08	£0.44	£0.00	£0.05	£0.00	£0.00	£0.57	£0.10	£0.50	£0.00	£0.06	£0.00	£0.00	£0.66
Little Common - Local Centre	1.51%	5.90%	0.00%	1.18%	0.00%	0.00%	2.41%	£0.08	£0.56	£0.00	£0.05	£0.00	£0.00	£0.69	£0.10	£0.65	£0.00	£0.06	£0.00	£0.00	£0.81
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	1.18%	0.85%	0.00%	0.34%	£0.00	£0.00	£0.00	£0.05	£0.04	£0.00	£0.09	£0.00	£0.00	£0.00	£0.06	£0.04	£0.00	£0.10
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	90.41%	79.42%	4.73%	39.57%	28.78%	50.93%	59.11%	£4.83	£7.58	£0.14	£1.64	£1.27	£1.08	£16.55	£5.79	£8.77	£0.16	£1.94	£1.48	£1.25	£19.39
Eastbourne - Town Centre	3.66%	7.12%	4.73%	4.62%	0.85%	0.00%	4.35%	£0.20	£0.68	£0.14	£0.19	£0.04	£0.00	£1.24	£0.23	£0.79	£0.16	£0.23	£0.04	£0.00	£1.45
Hastings - Town Centre	1.51%	6.23%	6.23%	24.41%	37.44%	27.27%	14.32%	£0.08	£0.59	£0.18	£1.01	£1.66	£0.58	£4.11	£0.10	£0.69	£0.21	£1.20	£1.93	£0.67	£4.79
Tunbridge Wells - Town Centre	0.00%	0.44%	23.41%	6.99%	0.00%	0.00%	3.21%	£0.00	£0.04	£0.68	£0.29	£0.00	£0.00	£1.01	£0.00	£0.05	£0.79	£0.34	£0.00	£0.00	£1.18
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	2.56%	0.00%	0.46%	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.13
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	6.95%	0.00%	1.15%	£0.00	£0.00	£0.00	£0.00	£0.31	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.36
Bluewater Shopping Centre	0.00%	0.00%	0.00%	1.18%	2.56%	0.00%	0.57%	£0.00	£0.00	£0.00	£0.05	£0.11	£0.00	£0.16	£0.00	£0.00	£0.00	£0.06	£0.13	£0.00	£0.19
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	1.62%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05
Heathfield - Town Centre	0.00%	0.00%	18.68%	1.18%	0.85%	0.00%	2.06%	£0.00	£0.00	£0.54	£0.05	£0.04	£0.00	£0.63	£0.00	£0.00	£0.63	£0.06	£0.04	£0.00	£0.73
Langney Centre, Eastbourne	0.75%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
London	0.00%	0.00%	0.00%	0.00%	1.71%	3.61%	0.57%	£0.00	£0.00	£0.00	£0.00	£0.08	£0.08	£0.15	£0.00	£0.00	£0.00	£0.00	£0.09	£0.09	£0.18
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	2.37%	0.00%	0.00%	0.34%	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.12
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
St Leonards - Town Centre	2.16%	4.23%	0.00%	9.24%	6.10%	12.70%	5.04%	£0.12	£0.40	£0.00	£0.38	£0.27	£0.27	£1.44	£0.14	£0.47	£0.00	£0.45	£0.31	£0.31	£1.68
Tenterden - Town Centre	0.00%	0.00%	1.62%	0.00%	4.39%	0.00%	0.92%	£0.00	£0.00	£0.05	£0.00	£0.19	£0.00	£0.24	£0.00	£0.00	£0.05	£0.00	£0.23	£0.00	£0.28
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Other	1.51%	1.22%	1.62%	1.18%	2.56%	3.61%	1.72%	£0.08	£0.12	£0.05	£0.05	£0.11	£0.08	£0.48	£0.10	£0.14	£0.05	£0.06	£0.13	£0.09	£0.56
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	35.74%	9.24%	3.54%	1.86%	5.15%	£0.00	£0.00	£1.04	£0.38	£0.16	£0.04	£1.62	£0.00	£0.00	£1.20	£0.45	£0.18	£0.05	£1.88
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cranbrook	0.00%	0.00%	1.62%	0.00%	1.71%	0.00%	0.46%	£0.00	£0.00	£0.05	£0.00	£0.08	£0.00	£0.12	£0.00	£0.00	£0.05	£0.00	£0.09	£0.00	£0.14
Others	4.42%	6.79%	60.90%	24.41%	32.93%	21.79%	19.01%	£0.24	£0.65	£1.77	£1.01	£1.46	£0.46	£5.59	£0.28	£0.75	£2.04	£1.20	£1.70	£0.54	£6.51

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Furniture, Furnishings & Carpets	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	27.84%	21.00%	0.00%	4.59%	0.89%	0.00%	12.26%	£0.88	£1.48	£0.00	£0.14	£0.03	£0.00	£2.54	£1.06	£1.71	£0.00	£0.17	£0.03	£0.00	£2.98
Battle - Town Centre	1.95%	0.85%	0.00%	11.37%	0.00%	1.66%	2.26%	£0.06	£0.06	£0.00	£0.36	£0.00	£0.03	£0.51	£0.07	£0.07	£0.00	£0.42	£0.00	£0.03	£0.60
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	8.04%	1.66%	1.51%	£0.00	£0.00	£0.00	£0.00	£0.26	£0.03	£0.29	£0.00	£0.00	£0.00	£0.00	£0.30	£0.03	£0.34
Ravenside Retail Park, Bexhill	8.67%	5.33%	0.00%	0.00%	1.79%	0.00%	3.44%	£0.28	£0.38	£0.00	£0.00	£0.06	£0.00	£0.71	£0.33	£0.43	£0.00	£0.00	£0.07	£0.00	£0.83
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	1.39%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Little Common - Local Centre	0.00%	3.62%	0.00%	0.00%	0.00%	0.00%	1.18%	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.30	£0.00	£0.00	£0.00	£0.00	£0.30
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	38.46%	32.20%	0.00%	15.96%	10.71%	3.32%	21.08%	£1.22	£2.27	£0.00	£0.50	£0.35	£0.06	£4.39	£1.46	£2.62	£0.00	£0.59	£0.41	£0.06	£5.15
Eastbourne - Town Centre	33.59%	33.16%	2.70%	11.37%	5.36%	15.34%	20.54%	£1.07	£2.34	£0.06	£0.36	£0.17	£0.26	£4.26	£1.28	£2.70	£0.07	£0.42	£0.20	£0.30	£4.98
Hastings - Town Centre	11.48%	14.29%	8.00%	27.32%	33.04%	44.15%	20.75%	£0.36	£1.01	£0.19	£0.86	£1.07	£0.74	£4.24	£0.44	£1.16	£0.22	£1.01	£1.25	£0.86	£4.94
Tunbridge Wells - Town Centre	0.98%	2.24%	26.61%	7.98%	6.25%	1.66%	6.24%	£0.03	£0.16	£0.63	£0.25	£0.20	£0.03	£1.30	£0.04	£0.18	£0.72	£0.30	£0.24	£0.03	£1.51
Ashford - Designer Outlet Village	0.00%	0.00%	1.35%	1.09%	2.68%	3.42%	1.08%	£0.00	£0.00	£0.03	£0.03	£0.09	£0.06	£0.21	£0.00	£0.00	£0.04	£0.04	£0.10	£0.07	£0.25
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	10.71%	1.66%	1.94%	£0.00	£0.00	£0.00	£0.00	£0.35	£0.03	£0.38	£0.00	£0.00	£0.00	£0.00	£0.41	£0.03	£0.44
Bluewater Shopping Centre	0.00%	0.43%	2.70%	2.30%	2.68%	0.00%	1.18%	£0.00	£0.03	£0.06	£0.07	£0.09	£0.00	£0.25	£0.00	£0.03	£0.07	£0.09	£0.10	£0.00	£0.29
Brighton - Town Centre	1.95%	0.43%	0.00%	1.09%	0.89%	0.00%	0.75%	£0.06	£0.03	£0.00	£0.03	£0.03	£0.00	£0.16	£0.07	£0.03	£0.00	£0.04	£0.03	£0.00	£0.18
Hailsham - Town Centre	0.00%	0.85%	0.00%	0.00%	0.00%	0.00%	0.32%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07
Heathfield - Town Centre	0.00%	0.00%	11.95%	3.39%	0.00%	0.00%	1.83%	£0.00	£0.00	£0.28	£0.11	£0.00	£0.00	£0.39	£0.00	£0.00	£0.33	£0.13	£0.00	£0.00	£0.45
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.89%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
London	1.95%	1.81%	3.95%	0.00%	3.57%	3.42%	2.26%	£0.06	£0.13	£0.09	£0.00	£0.12	£0.06	£0.46	£0.07	£0.15	£0.11	£0.00	£0.14	£0.07	£0.53
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.98%	0.85%	0.00%	0.00%	0.00%	1.66%	0.65%	£0.03	£0.06	£0.00	£0.00	£0.00	£0.03	£0.12	£0.04	£0.07	£0.00	£0.00	£0.00	£0.03	£0.14
St Leonards - Town Centre	0.98%	2.67%	1.35%	4.59%	2.68%	5.08%	2.69%	£0.03	£0.19	£0.03	£0.14	£0.09	£0.09	£0.57	£0.04	£0.22	£0.04	£0.17	£0.10	£0.10	£0.66
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.09%	2.68%	0.00%	0.65%	£0.00	£0.00	£0.00	£0.03	£0.09	£0.00	£0.12	£0.00	£0.00	£0.00	£0.04	£0.10	£0.00	£0.14
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	4.77%	5.33%	9.36%	6.89%	6.25%	6.84%	6.24%	£0.15	£0.38	£0.22	£0.22	£0.20	£0.12	£1.28	£0.18	£0.43	£0.25	£0.26	£0.24	£0.13	£1.50
Tunbridge Wells, Longfield Retail Park	2.93%	4.48%	30.67%	14.75%	8.93%	10.16%	9.78%	£0.09	£0.32	£0.72	£0.46	£0.29	£0.17	£2.06	£0.11	£0.36	£0.83	£0.55	£0.34	£0.20	£2.39
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lakeside Shopping Centre/Retail Park	0.98%	0.43%	1.35%	1.09%	1.79%	1.66%	1.08%	£0.03	£0.03	£0.03	£0.03	£0.06	£0.03	£0.21	£0.04	£0.03	£0.04	£0.04	£0.07	£0.03	£0.25
Shoreham	0.98%	0.85%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.03	£0.06	£0.00	£0.00	£0.00	£0.00	£0.09	£0.04	£0.07	£0.00	£0.00	£0.00	£0.00	£0.11
Maidstone	0.00%	0.00%	0.00%	1.09%	0.89%	1.66%	0.43%	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03	£0.09	£0.00	£0.00	£0.00	£0.04	£0.03	£0.03	£0.11
Others	15.49%	18.12%	62.68%	37.38%	44.64%	35.54%	31.40%	£0.49	£1.28	£1.48	£1.17	£1.45	£0.60	£6.47	£0.59	£1.48	£1.71	£1.39	£1.69	£0.69	£7.54

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Market shares	Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
DIY, Decorating & Gardening														
Bexhill - Town Centre	24.67%	25.25%	1.32%	11.76%	2.00%	1.62%	14.83%	£0.79	£1.79	£0.04	£0.43	£0.08	£0.03	£3.15
Battle - Town Centre	0.00%	0.40%	0.00%	6.48%	0.00%	0.00%	0.91%	£0.00	£0.03	£0.00	£0.23	£0.00	£0.00	£0.26
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	16.30%	0.00%	3.13%	£0.00	£0.00	£0.00	£0.00	£0.65	£0.00	£0.65
Ravenside Retail Park, Bexhill	69.44%	59.29%	6.48%	18.25%	8.20%	12.66%	37.44%	£2.22	£4.19	£0.18	£0.66	£0.33	£0.26	£7.85
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Little Common - Local Centre	0.00%	2.32%	0.00%	0.00%	0.00%	0.00%	0.81%	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.16
Robertsbridge	0.00%	0.00%	0.00%	4.29%	0.00%	0.00%	0.50%	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£0.16
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northium	0.00%	0.00%	0.00%	0.00%	4.80%	0.00%	0.91%	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.19
Sedlescombe	0.00%	0.00%	0.00%	2.19%	0.00%	1.62%	0.40%	£0.00	£0.00	£0.00	£0.08	£0.00	£0.03	£0.11
Rother District	94.11%	87.27%	7.80%	42.97%	31.30%	15.91%	58.93%	£3.01	£6.17	£0.22	£1.56	£1.25	£0.33	£12.54
Eastbourne - Town Centre	4.47%	3.84%	1.32%	2.19%	0.00%	0.00%	2.42%	£0.14	£0.27	£0.04	£0.08	£0.00	£0.00	£0.53
Hastings - Town Centre	0.71%	4.24%	6.48%	36.49%	36.10%	55.42%	17.96%	£0.02	£0.30	£0.18	£1.32	£1.44	£1.15	£4.41
Tunbridge Wells - Town Centre	0.00%	0.00%	19.45%	1.10%	0.00%	0.00%	2.02%	£0.00	£0.00	£0.54	£0.04	£0.00	£0.00	£0.58
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	4.10%	0.00%	0.81%	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.16
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	12.90%	0.00%	2.42%	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.52
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	1.32%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Heathfield - Town Centre	0.00%	0.00%	12.97%	0.00%	0.00%	1.62%	1.41%	£0.00	£0.00	£0.36	£0.00	£0.00	£0.03	£0.39
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.32%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.81%	0.00%	0.00%	0.00%	0.00%	0.30%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06
St Leonards - Town Centre	0.00%	0.00%	0.00%	3.19%	2.00%	0.00%	0.81%	£0.00	£0.00	£0.00	£0.12	£0.08	£0.00	£0.20
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.10%	2.00%	0.00%	0.50%	£0.00	£0.00	£0.00	£0.04	£0.08	£0.00	£0.12
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.00%	1.52%	14.29%	5.38%	4.10%	4.76%	3.73%	£0.00	£0.11	£0.40	£0.20	£0.16	£0.10	£0.96
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	35.06%	6.48%	1.40%	1.62%	4.64%	£0.00	£0.00	£0.97	£0.23	£0.06	£0.03	£1.30
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ore	0.00%	0.40%	0.00%	1.10%	2.70%	19.05%	2.32%	£0.00	£0.03	£0.00	£0.04	£0.11	£0.39	£0.57
Wyevalle Garden Centre, Hastings	0.71%	1.92%	0.00%	0.00%	2.70%	1.62%	1.41%	£0.02	£0.14	£0.00	£0.00	£0.11	£0.03	£0.30
Others	0.71%	4.65%	64.94%	17.25%	32.60%	28.67%	18.67%	£0.02	£0.33	£1.80	£0.63	£1.30	£0.59	£4.67
	£0.03	£0.38	£2.08	£0.74	£1.52	£0.68	£5.43							

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

14. Comparison Market Share & Implied Turnover Summary

Comparison Summary	Implied turnover 2011							Implied turnover 2016							Market shares (pre-M&S impact)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	£13.58	£21.87	£0.15	£2.11	£0.46	£0.51	£38.67	£16.28	£25.29	£0.17	£2.49	£0.54	£0.59	£45.36	35.7%	27.8%	0.5%	5.6%	1.2%	2.6%	16.1%
Battle - Town Centre	£0.28	£1.36	£0.12	£5.01	£0.00	£0.29	£7.06	£0.33	£1.58	£0.14	£5.93	£0.00	£0.33	£8.306	0.7%	1.7%	0.4%	13.4%	0.0%	1.5%	2.9%
Rye - Town Centre	£0.01	£0.00	£0.00	£0.18	£7.63	£0.21	£8.04	£0.02	£0.00	£0.00	£0.21	£8.89	£0.25	£9.37	0.0%	0.0%	0.0%	0.5%	20.0%	1.1%	3.4%
Ravenside Retail Park, Bexhill	£8.71	£13.01	£0.35	£1.77	£1.53	£1.40	£26.78	£10.45	£15.05	£0.41	£2.09	£1.79	£1.62	£31.39	22.9%	16.6%	1.3%	4.7%	4.0%	7.2%	11.2%
Tesco, Ravenside Retail Park	£0.85	£1.47	£0.05	£0.08	£0.00	£0.00	£2.46	£1.02	£1.70	£0.06	£0.09	£0.00	£0.00	£2.88	2.2%	1.9%	0.2%	0.2%	0.0%	0.0%	1.0%
Sidley - Local Centre	£0.20	£1.68	£0.00	£0.05	£0.00	£0.00	£1.93	£0.24	£1.94	£0.00	£0.06	£0.00	£0.00	£2.24	0.5%	2.1%	0.0%	0.1%	0.0%	0.0%	0.8%
Little Common - Local Centre	£0.08	£2.84	£0.00	£0.05	£0.00	£0.01	£2.99	£0.10	£3.29	£0.00	£0.06	£0.00	£0.01	£3.46	0.2%	3.6%	0.0%	0.1%	0.0%	0.1%	1.2%
Robertsbridge	£0.00	£0.06	£0.10	£1.28	£0.00	£0.00	£1.44	£0.00	£0.07	£0.11	£1.51	£0.00	£0.00	£1.69	0.0%	0.1%	0.3%	3.4%	0.0%	0.0%	0.6%
Peasmarsh	£0.00	£0.00	£0.05	£0.05	£0.29	£0.00	£0.39	£0.00	£0.00	£0.06	£0.06	£0.34	£0.00	£0.46	0.0%	0.0%	0.2%	0.1%	0.8%	0.0%	0.2%
Ticehurst	£0.00	£0.00	£0.95	£0.00	£0.02	£0.00	£0.97	£0.00	£0.00	£1.10	£0.00	£0.02	£0.00	£1.12	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.4%
Northium	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.42	£0.00	£0.42	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%
Sedlescombe	£0.00	£0.00	£0.00	£0.08	£0.00	£0.03	£0.11	£0.00	£0.00	£0.00	£0.09	£0.00	£0.04	£0.13	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%
Rother District	£23.71	£42.29	£1.78	£10.65	£10.30	£2.46	£91.20	£28.42	£48.92	£2.06	£12.59	£12.00	£2.84	£106.83	62.3%	53.8%	6.3%	28.5%	27.0%	12.6%	38.0%
Eastbourne - Town Centre	£9.22	£21.46	£0.98	£3.87	£0.84	£1.26	£37.64	£11.05	£24.82	£1.13	£4.58	£0.98	£1.45	£44.02	24.2%	27.3%	3.5%	10.4%	2.2%	6.4%	15.7%
Hastings - Town Centre	£3.34	£8.24	£2.34	£11.27	£14.54	£10.69	£50.41	£4.00	£9.52	£2.70	£13.32	£16.94	£12.34	£58.82	8.8%	10.5%	8.3%	30.1%	38.1%	54.6%	21.0%
Tunbridge Wells - Town Centre	£0.06	£0.71	£13.04	£4.74	£1.46	£0.47	£20.47	£0.07	£0.82	£15.06	£5.60	£1.70	£0.54	£23.79	0.2%	0.9%	46.5%	12.7%	3.8%	2.4%	8.5%
Total comparison spend	£38.08	£78.58	£28.07	£37.43	£38.16	£19.56	£239.89	£45.66	£90.88	£32.41	£44.24	£44.47	£22.58	£280.24							

Comparison Summary	Implied turnover 2016 (with M&S)							Revised market shares (with M&S)							Attraction from Outside Study Area (Hastings/Tourist/Visitor Spend)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	% Inflow	2011 Inflow £M	2011 Total Turnover	2016 Total Turnover	2018 Total Turnover	2023 Total Turnover	2028 Total Turnover
Bexhill - Town Centre	£16.00	£25.01	£0.17	£2.49	£0.54	£0.59	£44.80	35.0%	27.5%	0.5%	5.6%	1.2%	2.6%	16.0%	15%	£5.80	£44.48	£51.52	£55.31	£66.23	£79.30
Battle - Town Centre	£0.33	£1.58	£0.14	£5.93	£0.00	£0.33	£8.306	0.7%	1.7%	0.4%	13.4%	0.0%	1.5%	3.0%	40%	£2.82	£9.89	£11.63	£12.48	£14.95	£17.90
Rye - Town Centre	£0.02	£0.00	£0.00	£0.21	£8.84	£0.25	£9.32	0.0%	0.0%	0.0%	0.5%	19.9%	1.1%	3.3%	40%	£3.22	£11.26	£13.04	£14.00	£16.77	£20.07
Ravenside Retail Park, Bexhill	£12.13	£16.73	£0.52	£2.37	£1.96	£1.56	£35.27	26.6%	18.4%	1.6%	5.4%	4.4%	6.9%	12.6%	40%	£11.69	£40.92	£53.41	£57.34	£68.67	£82.21
Tesco, Ravenside Retail Park	£1.02	£1.70	£0.06	£0.09	£0.00	£0.00	£2.88	2.2%	1.9%	0.2%	0.2%	0.0%	0.0%	1.0%							
Sidley - Local Centre	£0.24	£1.94	£0.00	£0.06	£0.00	£0.00	£2.24	0.5%	2.1%	0.0%	0.1%	0.0%	0.0%	0.8%							
Little Common - Local Centre	£0.10	£3.29	£0.00	£0.06	£0.00	£0.01	£3.46	0.2%	3.6%	0.0%	0.1%	0.0%	0.1%	1.2%							
Robertsbridge	£0.00	£0.07	£0.11	£1.51	£0.00	£0.00	£1.69	0.0%	0.1%	0.3%	3.4%	0.0%	0.0%	0.6%							
Peasmarsh	£0.00	£0.00	£0.06	£0.06	£0.34	£0.00	£0.46	0.0%	0.0%	0.2%	0.1%	0.8%	0.0%	0.2%							
Ticehurst	£0.00	£0.00	£1.10	£0.00	£0.02	£0.00	£1.12	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.4%							
Northium	£0.00	£0.00	£0.00	£0.00	£0.42	£0.00	£0.42	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%							
Sedlescombe	£0.00	£0.00	£0.00	£0.09	£0.00	£0.04	£0.13	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%							
Rother District	£29.83	£50.32	£2.17	£12.87	£12.11	£2.79	£110.09	65.3%	55.4%	6.7%	29.1%	27.2%	12.3%	39.3%							
Eastbourne - Town Centre	£9.92	£23.70	£1.13	£4.52	£0.98	£1.45	£41.72	21.7%	26.1%	3.5%	10.2%	2.2%	6.4%	14.9%							
Hastings - Town Centre	£3.72	£9.24	£2.64	£13.15	£16.83	£11.89	£57.47	8.1%	10.2%	8.2%	29.7%	37.9%	52.6%	20.5%							
Tunbridge Wells - Town Centre	£0.07	£0.82	£15.06	£5.54	£1.70	£0.54	£23.73	0.2%	0.9%	46.5%	12.5%	3.8%	2.4%	8.5%							
Total comparison spend	£45.66	£90.88	£32.41	£44.24	£44.47	£22.58	£280.24	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%							

Notes
M&S diversions derived from CGMS impact assessment and GLH critique

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

15. Comparison goods benchmark turnovers 2012

Centre/Location	Sales Area	Benchmark Trading Density	Benchmark Turnover
	Sqm	£/Sqm	£M
Bexhill - Town Centre	15,200	£3,724	£56.61
Battle - Town Centre	3,330	£2,926	£9.74
Rye - Town Centre	6,820	£2,926	£19.96
Ravenside Retail Park, Bexhill	14,878	£3,724	£55.41

APPENDIX B: QUANTITATIVE RETAIL CAPACITY (BASELINE GROWTH)

16. Comparison Capacity

Centre/Location	Benchmark Turnover	Market Share	Surplus	Benchmark Trading Density	Sales Floorspace	Gross Floorspace
	£M	£M	£M	£/sqm	Sqm	Sqm
2013						
Bexhill - Town Centre	£57.32	£46.92	-£10.40	£3,771	-2,758	-3,724
Ravenside Retail Park, Bexhill	£46.55	£43.17	-£3.38	£3,771	-897	-1,077
Bexhill total			-£13.79		-3656	-4801
Town centre capacity (50% diverted)			-£12.09		-3207	
2018						
Bexhill - Town Centre	£60.99	£55.31	-£5.68	£4,012	-1,416	-1,912
Ravenside Retail Park, Bexhill	£59.70	£57.34	-£2.36	£4,012	-588	-706
Bexhill total			-£8.04		-2005	-2618
Town centre capacity (50% diverted)			-£6.86		-1711	
2023						
Bexhill - Town Centre	£64.90	£66.23	£1.34	£4,270	313	423
Ravenside Retail Park, Bexhill	£63.52	£68.67	£5.14	£4,270	1,205	1,445
Bexhill total			£6.48		1518	1868
Town centre capacity (50% diverted)			£3.91		915	
2028						
Bexhill - Town Centre	£69.06	£79.30	£10.24	£4,543	2,254	3,043
Ravenside Retail Park, Bexhill	£67.59	£82.21	£14.61	£4,543	3,217	3,860
Bexhill total			£24.85		5470	6902
Town centre capacity (50% diverted)			£17.55		3862	

Notes
1.25% pa sales efficiency allowance
M&S assumed to be complete by end 2013

APPENDIX C: Quantitative Capacity Assessment –Scenario A

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

1. New stores and commitments

	Net sales area	Convenience	Comparison	Convenience trading density 2012	Convenience turnover 2013 (£M)	Comparison trading density 2012	Comparison turnover 2013 (£M)
Within the District							
Marks & Spencer, Ravenside Retail Park, Bexhill	3,121	743	2,378	£11,165	£8.31	£2,142	£5.22
Jempsons/Budgens extension, Rye	595	506	89	£4,542	£2.30	£2,813	£0.26
Sainsbury's, Ferry Road, Rye	1,727	1,382	345	£13,141	£18.20	£6,011	£2.13
Tesco, Ferry Road, Rye	1,525	1,372	153	£13,021	£17.90	£7,182	£1.13
Jempsons/Budgens extension, Peasmarsh	1,670	1,420	251	£4,542	£6.46	£2,813	£0.72
Outside Rother							
Morrisons, Hampden Park, Eastbourne	3,473	2,897	576	£12,864	£37.34	£7,575	£4.47
Sovereign Harbour Retail Park	3,544	975	3,544	£10,020	£9.77	£3,225	£11.43
Asda Silverhill, Hastings	3,570	2,249	1,321	£11,347	£25.57		

Notes

Trading densities derived from Verdict 2012

Sales efficiency of 0.2% and 2.5% pa applied to convenience and comparison respectively

Sales areas provided by relevant local planning authorities

No details available on the Jempsons/Budgens convenience/comparison splits - 85/15 split assumed

Sovereign Harbour Retail Park proposal assumes flexibility to provide up to 975 sqm net convenience. Turnover derived from retail assessment

Tesco Ferry Road resolution to grant - planning permission not issued. Scheme on the same site as Sainsbury's permission, therefore only Sainsbury's built into revised baseline position

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

2. Population

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	16,932	29,535	8,802	12,955	15,857	7,620	91,701
2013	17,595	30,077	8,956	13,355	16,215	7,751	93,950
2016	18,257	30,619	9,110	13,753	16,573	7,882	96,195
2018	18,697	30,978	9,213	14,018	16,810	7,969	97,685
2023	19,788	31,871	9,467	14,676	17,399	8,184	101,385
2028	20,872	32,758	9,719	15,329	17,984	8,399	105,061

3. Expenditure per person 2011 (inc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	
Convenience	£1,812	£2,070	£2,194	£2,057	£2,033	£2,019	
Comparison	£2,400	£2,828	£3,557	£3,135	£2,653	£2,791	

4. Convenience expenditure per person (exc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	
2011	£1,775	£2,027	£2,149	£2,015	£1,991	£1,978	
2013	£1,749	£1,997	£2,117	£1,985	£1,962	£1,949	
2016	£1,758	£2,007	£2,127	£1,995	£1,971	£1,958	
2018	£1,768	£2,020	£2,140	£2,007	£1,983	£1,970	
2023	£1,819	£2,078	£2,202	£2,065	£2,040	£2,027	
2028	£1,884	£2,152	£2,280	£2,138	£2,113	£2,099	

Notes

SFT deducted in line with Experian Retail Planner Briefing Note 10.1 Appendix 3

Expenditure growth in line with Experian Retail Planner Briefing Note 10.1 Figure 1a

5. Convenience expenditure generated (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	£30.06	£59.88	£18.91	£26.10	£31.57	£15.07	£181.59
2013	£30.77	£60.08	£18.96	£26.51	£31.81	£15.10	£183.23
2016	£32.09	£61.46	£19.38	£27.43	£32.67	£15.43	£188.47
2018	£33.06	£62.56	£19.72	£28.13	£33.34	£15.70	£192.51
2023	£36.00	£66.22	£20.84	£30.30	£35.50	£16.59	£205.44
2028	£39.32	£70.49	£22.16	£32.78	£38.00	£17.63	£220.38

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

6. Comparison expenditure by category 2011 (inc. SFT)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight
Clothing & Footwear	£556.77	£620.31	£805.47	£709.03	£590.01	£615.49
Chemist & Personal Care	£386.39	£486.16	£564.32	£489.99	£384.36	£407.22
Books & Media	£101.32	£124.29	£174.77	£150.04	£127.12	£130.21
Recreation & Leisure Goods	£309.29	£375.53	£548.77	£469.29	£414.73	£450.68
China, Glass & Home Textiles	£203.13	£252.62	£327.69	£289.65	£220.07	£234.85
Household Appliances	£104.71	£117.47	£117.72	£112.86	£105.82	£113.47
Audio Visual Equipment	£336.41	£343.50	£368.08	£347.59	£307.83	£303.66
Furniture, Furnishings & Carpets	£200.19	£253.45	£298.83	£262.93	£225.87	£240.67
DIY, Decorating & Gardening	£201.86	£254.48	£351.62	£303.47	£277.59	£295.24
Total	£2,400	£2,828	£3,557	£3,135	£2,653	£2,791

7. Comparison expenditure per head exc. SFT (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight
2011	£2,249	£2,661	£3,189	£2,889	£2,407	£2,567
2013	£2,322	£2,746	£3,292	£2,983	£2,484	£2,650
2016	£2,517	£2,978	£3,569	£3,234	£2,694	£2,873
2018	£2,665	£3,153	£3,779	£3,424	£2,852	£3,042
2023	£3,087	£3,652	£4,376	£3,966	£3,303	£3,523
2028	£3,579	£4,233	£5,074	£4,597	£3,829	£4,085

8. Comparison expenditure generated exc. SFT (£M)

	Bexhill East	Bexhill West	NW Rother	Battle	Rye	Westfield, Guestling, Fairlight	Total
2011	£38.08	£78.58	£28.07	£37.43	£38.16	£19.56	£239.89
2013	£40.85	£82.60	£29.48	£39.83	£40.28	£20.54	£253.59
2016	£45.96	£91.18	£32.51	£44.48	£44.64	£22.65	£281.42
2018	£49.84	£97.68	£34.81	£48.00	£47.95	£24.24	£302.51
2023	£61.09	£116.38	£41.43	£58.20	£57.47	£28.84	£363.41
2028	£74.70	£138.67	£49.31	£70.47	£68.87	£34.31	£436.32

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

9. Convenience Shopping - Implied Turnovers

Store/Location	2013 (baseline + Asda Silverhill)							2016 (baseline + Asda Silverhill + M&S)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£9.03	£14.45	£0.00	£0.06	£0.00	£0.00	£23.54	£8.55	£13.93	£0.00	£0.06	£0.00	£0.00	£22.54
Co-op, Bexhill, Devonshire Rd	£2.40	£1.48	£0.00	£0.00	£0.08	£0.00	£3.96	£2.33	£1.52	£0.00	£0.00	£0.08	£0.00	£3.93
Co-op, Bexhill, Western Rd	£0.97	£1.47	£0.00	£0.00	£0.04	£0.00	£2.48	£1.01	£1.51	£0.00	£0.00	£0.04	£0.00	£2.55
Local Store, Bexhill	£1.83	£1.72	£0.08	£0.00	£0.00	£0.00	£3.64	£1.91	£1.76	£0.08	£0.00	£0.00	£0.00	£3.75
Bexhill Town Centre														
Budgen, Battle, Market Square	£0.00	£0.86	£0.00	£3.76	£0.00	£0.09	£4.71	£0.00	£0.88	£0.00	£3.76	£0.00	£0.09	£4.73
Co-op, Battle, High St	£0.05	£0.08	£0.00	£0.37	£0.00	£0.00	£0.49	£0.05	£0.08	£0.00	£0.38	£0.00	£0.00	£0.51
Local Store, Battle	£0.00	£0.00	£0.00	£0.38	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.39	£0.00	£0.00	£0.39
Battle Town Centre														
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.06	£4.46	£0.00	£4.52	£0.00	£0.00	£0.00	£0.06	£4.58	£0.00	£4.64
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.02	£0.16	£2.18	£0.00	£0.00	£0.00	£0.00	£2.08	£0.17	£2.24
Rye Town Centre														
Lidl, Sidley, Ninfield Rd	£0.60	£2.40	£0.00	£0.19	£0.04	£0.00	£3.23	£0.63	£2.45	£0.00	£0.20	£0.04	£0.00	£3.32
Local Store, Sidley	£0.07	£0.64	£0.00	£0.00	£0.00	£0.00	£0.71	£0.07	£0.65	£0.00	£0.00	£0.00	£0.00	£0.73
Co-op, Sidley, Ninfield Rd	£0.39	£1.07	£0.00	£0.00	£0.00	£0.00	£1.45	£0.40	£1.09	£0.00	£0.00	£0.00	£0.00	£1.49
Sidley District Centre, Bexhill														
Co-op, Little Common, Cooden Sea Rd	£0.00	£2.83	£0.00	£0.00	£0.44	£0.00	£3.26	£0.00	£2.89	£0.00	£0.00	£0.45	£0.00	£3.34
Local Store, Little Common	£0.15	£0.84	£0.00	£0.00	£0.00	£0.00	£0.99	£0.15	£0.86	£0.00	£0.00	£0.00	£0.00	£1.02
Little Common District Centre, Bexhill														
Aldi, Bexhill, London Rd	£1.25	£2.72	£0.00	£0.13	£0.00	£0.00	£4.09	£1.13	£2.61	£0.00	£0.13	£0.00	£0.00	£3.87
Tesco, Bexhill, Collington Ave	£0.53	£1.95	£0.00	£0.12	£0.04	£0.12	£2.77	£0.55	£2.00	£0.00	£0.13	£0.04	£0.12	£2.84
Jempson, Peasmarsh, Main St	£0.00	£0.13	£0.26	£0.38	£4.49	£0.19	£5.45	£0.00	£0.13	£0.26	£0.39	£4.61	£0.20	£5.59
Tesco, Bexhill, Ravenside	£10.51	£13.21	£0.25	£0.83	£0.21	£0.12	£25.14	£9.66	£12.24	£0.19	£0.86	£0.22	£0.12	£23.30
M&S, Bexhill, Ravenside								£3.06	£3.27	£0.49	£0.43	£0.70	£0.59	£8.55
Tesco Express, Battle, Battle Hill	£0.00	£0.42	£0.00	£1.05	£0.08	£0.09	£1.63	£0.00	£0.43	£0.00	£1.08	£0.08	£0.09	£1.68
Out Of Centre Stores In Rother														
Local Store, Burwash	£0.00	£0.00	£1.72	£0.06	£0.00	£0.00	£1.79	£0.00	£0.00	£1.76	£0.06	£0.00	£0.00	£1.83
Local Store, Robertsbridge	£0.05	£0.00	£0.00	£1.55	£0.00	£0.00	£1.60	£0.05	£0.00	£0.00	£1.60	£0.00	£0.00	£1.66
Local Store, Ticehurst	£0.00	£0.00	£1.49	£0.00	£0.00	£0.00	£1.49	£0.00	£0.00	£1.52	£0.00	£0.00	£0.00	£1.52
Local Store, Sedlescombe	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.70
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.24
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.27
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.59	£0.00	£0.00	£0.00	£0.00	£0.61	£0.00	£0.61
Local Store, Catsfield	£0.00	£0.35	£0.00	£0.08	£0.00	£0.00	£0.42	£0.00	£0.35	£0.00	£0.08	£0.00	£0.00	£0.43
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.33	£1.33	£0.00	£0.00	£0.00	£0.00	£0.00	£1.36	£1.36
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.44	£0.35	£0.79	£0.00	£0.00	£0.00	£0.00	£0.45	£0.36	£0.81
Local Store, Etchingham	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.76	£0.00	£0.00	£0.00	£0.76
Local Store, Hurst Green	£0.00	£0.00	£0.41	£0.08	£0.00	£0.00	£0.49	£0.00	£0.00	£0.42	£0.08	£0.00	£0.00	£0.50
Local Stores/Village Centres In Rother														
Stores outside the District														
Asda, Eastbourne, Crumbles	£0.65	£3.01	£0.17	£0.06	£0.00	£0.15	£4.05	£0.59	£2.91	£0.18	£0.06	£0.00	£0.15	£3.90
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.22	£1.51	£1.00	£5.37	£3.53	£2.66	£14.28	£0.23	£1.37	£0.85	£5.39	£3.54	£2.55	£13.92
Morrison, Hastings, Queens Road	£0.15	£0.39	£0.16	£1.02	£1.31	£2.66	£5.69	£0.15	£0.40	£0.16	£1.06	£1.34	£2.55	£5.66
Tesco, Hastings, St Leonards, Churchwood Drive	£0.28	£1.21	£1.00	£2.69	£1.61	£1.66	£8.44	£0.12	£1.06	£0.85	£2.78	£1.56	£1.61	£7.99
Asda Silverhill, Hastings	£0.29	£1.50	£1.00	£4.02	£2.00	£1.96	£10.78	£0.22	£1.36	£1.02	£4.17	£2.06	£2.01	£10.83
Large Stores Outside Rother with Significant Influence														
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.50	£0.07	£0.57	£0.00	£0.00	£0.00	£0.00	£0.51	£0.08	£0.58
Budgen, Hawkhurst, Rye Rd	£0.00	£0.08	£1.18	£0.33	£1.03	£0.09	£2.70	£0.00	£0.08	£1.21	£0.34	£1.05	£0.09	£2.77
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.30	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.30
Co-op, Eastbourne, Albert Parade	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08
Co-op, Hailsham, The Quintons	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Heathfield, High St	£0.00	£0.00	£2.93	£0.19	£0.00	£0.00	£3.12	£0.00	£0.00	£2.95	£0.20	£0.00	£0.00	£3.14
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.38	£0.41	£0.00	£0.00	£0.00	£0.00	£0.04	£0.39	£0.42
Co-op, Polegate, The Centre	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10
Co-op, St Leonards, London Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£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	£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	£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	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costcutter, Wadhurst, Sparrows Green Rd	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.38	£0.00	£0.00	£0.39	£0.00	£0.00	£0.00	£0.39
Iceland, Hastings, Castle St	£0.00	£0.00	£0.05	£0.00	£0.00	£0.15	£0.20	£0.00	£0.00	£0.05	£0.00	£0.00	£0.15	£0.20
Iceland, Ashford, High St	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Iceland, Eastbourne, Langney Road	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
Iceland, Tunbridge Wells, Calverley Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, St Leonards, Bohemia Rd	£0.00	£0.05	£0.00	£0.06	£0.26	£0.16	£0.53	£0.00	£0.05	£0.00	£0.06	£0.26	£0.17	£0.54
Local Store, Hastings	£0.00	£0.00	£0.00	£0.43	£0.44	£0.18	£1.05	£0.00	£0.00	£0.00	£0.32	£0.32	£0.18	£0.83
Marks & Spencer, Eastbourne	£0.07	£0.47	£0.00	£0.00	£0.00	£0.00	£0.54	£0.07	£0.32	£0.00	£0.00	£0.00	£0.00	£0.39
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.20	£0.13	£0.09	£0.06</										

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

9. Convenience Shopping - Implied Turnovers (con)

	2018							2023						
Store/Location	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£8.81	£14.18	£0.00	£0.07	£0.00	£0.00	£23.05	£9.59	£15.01	£0.00	£0.07	£0.00	£0.00	£24.67
Co-op, Bexhill, Devonshire Rd	£2.40	£1.54	£0.00	£0.00	£0.08	£0.00	£4.03	£2.62	£1.63	£0.00	£0.00	£0.08	£0.00	£4.34
Co-op, Bexhill, Western Rd	£1.04	£1.53	£0.00	£0.00	£0.04	£0.00	£2.61	£1.13	£1.62	£0.00	£0.00	£0.04	£0.00	£2.80
Local Store, Bexhill	£1.97	£1.79	£0.09	£0.00	£0.00	£0.00	£3.85	£2.14	£1.90	£0.09	£0.00	£0.00	£0.00	£4.13
Bexhill Town Centre														
Budgen, Battle, Market Square	£0.00	£0.90	£0.00	£3.86	£0.00	£0.09	£4.85	£0.00	£0.95	£0.00	£4.15	£0.00	£0.10	£5.20
Co-op, Battle, High St	£0.05	£0.08	£0.00	£0.39	£0.00	£0.00	£0.52	£0.06	£0.08	£0.00	£0.42	£0.00	£0.00	£0.56
Local Store, Battle	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.40	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.43
Battle Town Centre														
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.06	£4.67	£0.00	£4.74	£0.00	£0.00	£0.00	£0.07	£4.98	£0.00	£5.04
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.12	£0.17	£2.29	£0.00	£0.00	£0.00	£0.00	£2.25	£0.18	£2.43
Rye Town Centre														
Lidl, Sidley, Ninfield Rd	£0.65	£2.50	£0.00	£0.20	£0.04	£0.00	£3.39	£0.71	£2.64	£0.00	£0.22	£0.04	£0.00	£3.61
Local Store, Sidley	£0.08	£0.67	£0.00	£0.00	£0.00	£0.00	£0.74	£0.08	£0.70	£0.00	£0.00	£0.00	£0.00	£0.79
Co-op, Sidley, Ninfield Rd	£0.41	£1.11	£0.00	£0.00	£0.00	£0.00	£1.52	£0.45	£1.18	£0.00	£0.00	£0.00	£0.00	£1.63
Sidley District Centre, Bexhill														
Co-op, Little Common, Cooden Sea Rd	£0.00	£2.94	£0.00	£0.00	£0.46	£0.00	£3.40	£0.00	£3.12	£0.00	£0.00	£0.49	£0.00	£3.60
Local Store, Little Common	£0.16	£0.88	£0.00	£0.00	£0.00	£0.00	£1.04	£0.17	£0.93	£0.00	£0.00	£0.00	£0.00	£1.10
Little Common District Centre, Bexhill														
Aldi, Bexhill, London Rd	£1.16	£2.66	£0.00	£0.13	£0.00	£0.00	£3.95	£1.26	£2.81	£0.00	£0.15	£0.00	£0.00	£4.22
Tesco, Bexhill, Collington Ave	£0.57	£2.03	£0.00	£0.13	£0.04	£0.12	£2.90	£0.62	£2.15	£0.00	£0.15	£0.04	£0.13	£3.09
Jempson, Peasmarsh, Main St	£0.00	£0.13	£0.27	£0.40	£4.71	£0.20	£5.70	£0.00	£0.14	£0.28	£0.43	£5.01	£0.21	£6.07
Tesco, Bexhill, Ravenside	£9.95	£12.46	£0.20	£0.88	£0.22	£0.12	£23.84	£10.84	£13.19	£0.21	£0.95	£0.24	£0.13	£25.55
M&S, Bexhill, Ravenside	£3.15	£3.33	£0.50	£0.45	£0.72	£0.60	£8.75	£3.43	£3.52	£0.53	£0.48	£0.77	£0.64	£9.36
Tesco Express, Battle, Battle Hill	£0.00	£0.44	£0.00	£1.11	£0.08	£0.09	£1.72	£0.00	£0.46	£0.00	£1.20	£0.08	£0.10	£1.84
Out Of Centre Stores In Rother														
Local Store, Burwash	£0.00	£0.00	£1.79	£0.07	£0.00	£0.00	£1.86	£0.00	£0.00	£1.89	£0.07	£0.00	£0.00	£1.97
Local Store, Robertsbridge	£0.05	£0.00	£0.00	£1.65	£0.00	£0.00	£1.70	£0.06	£0.00	£0.00	£1.77	£0.00	£0.00	£1.83
Local Store, Ticehurst	£0.00	£0.00	£1.55	£0.00	£0.00	£0.00	£1.55	£0.00	£0.00	£1.64	£0.00	£0.00	£0.00	£1.64
Local Store, Sedlescombe	£0.00	£0.00	£0.00	£0.72	£0.00	£0.00	£0.72	£0.00	£0.00	£0.00	£0.78	£0.00	£0.00	£0.78
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.25	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.26
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.29
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£0.62	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£0.66
Local Store, Catsfield	£0.00	£0.36	£0.00	£0.08	£0.00	£0.00	£0.44	£0.00	£0.38	£0.00	£0.09	£0.00	£0.00	£0.47
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£1.46	£1.46
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.46	£0.37	£0.83	£0.00	£0.00	£0.00	£0.00	£0.49	£0.39	£0.88
Local Store, Etchingham	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.82	£0.00	£0.00	£0.00	£0.82
Local Store, Hurst Green	£0.00	£0.00	£0.43	£0.08	£0.00	£0.00	£0.51	£0.00	£0.00	£0.45	£0.09	£0.00	£0.00	£0.54
Local Stores/Village Centres In Rother														
Stores outside the District														
Asda, Eastbourne, Crumbles	£0.61	£2.96	£0.18	£0.07	£0.00	£0.16	£3.97	£0.66	£3.13	£0.19	£0.07	£0.00	£0.17	£4.23
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.23	£1.40	£0.87	£5.52	£3.61	£2.59	£14.22	£0.25	£1.48	£0.92	£5.95	£3.85	£2.74	£15.18
Morrison, Hastings, Queens Road	£0.16	£0.41	£0.17	£1.08	£1.37	£2.59	£5.78	£0.17	£0.43	£0.18	£1.17	£1.46	£2.74	£6.14
Tesco, Hastings, St Leonards, Churchwood Drive	£0.12	£1.08	£0.87	£2.85	£1.60	£1.64	£8.16	£0.13	£1.15	£0.92	£3.07	£1.70	£1.73	£8.70
Asda Silverhill, Hastings	£0.22	£1.39	£1.04	£4.27	£2.10	£2.04	£11.06	£0.24	£1.47	£1.10	£4.60	£2.23	£2.16	£11.80
Large Stores Outside Rother with Significant Influence														
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.52	£0.08	£0.60	£0.00	£0.00	£0.00	£0.00	£0.55	£0.08	£0.63
Budgen, Hawkhurst, Rye Rd	£0.00	£0.08	£1.23	£0.35	£1.07	£0.09	£2.82	£0.00	£0.08	£1.30	£0.37	£1.14	£0.10	£3.00
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.18	£0.00	£0.08	£0.00	£0.31	£0.00	£0.05	£0.19	£0.00	£0.08	£0.00	£0.33
Co-op, Eastbourne, Albert Parade	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.08
Co-op, Hailsham, The Quintons	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Heathfield, High St	£0.00	£0.00	£3.00	£0.20	£0.00	£0.00	£3.20	£0.00	£0.00	£3.17	£0.22	£0.00	£0.00	£3.39
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.39	£0.43	£0.00	£0.00	£0.00	£0.00	£0.04	£0.42	£0.46
Co-op, Polegate, The Centre	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11
Co-op, St Leonards, London Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£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	£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	£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	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costcutter, Wadhurst, Sparrows Green Rd	£0.00	£0.00	£0.40	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.42	£0.00	£0.00	£0.00	£0.42
Iceland, Hastings, Castle St	£0.00	£0.00	£0.05	£0.00	£0.00	£0.16	£0.21	£0.00	£0.00	£0.05	£0.00	£0.00	£0.17	£0.22
Iceland, Ashford, High St	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Iceland, Eastbourne, Langney Road	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06
Iceland, Tunbridge Wells, Calverley Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£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	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, St Leonards, Bohemia Rd	£0.00	£0.05	£0.00	£0.07	£0.27	£0.17	£0.55	£0.00	£0.05	£0.00	£0.07	£0.29	£0.18	£0.59
Local Store, Hastings	£0.00	£0.00	£0.00	£0.33	£0.33	£0.19	£0.84	£0.00	£0.00	£0.00	£0.35	£0.35	£0.20	£0.90
Marks & Spencer, Eastbourne	£0.07	£0.32	£0.00	£0.00	£0.00	£0.00	£0.40	£0.08	£0.34	£0.00	£0.00	£0.00	£0.00	£0.42
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.01	£0.09												

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

9. Convenience Shopping - Implied Turnovers (con)

2028							
Store/Location	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Sainsbury, Bexhill, Buckhurst Place	£10.47	£15.98	£0.00	£0.08	£0.00	£0.00	£26.53
Co-op, Bexhill, Devonshire Rd	£2.86	£1.74	£0.00	£0.00	£0.09	£0.00	£4.69
Co-op, Bexhill, Western Rd	£1.24	£1.73	£0.00	£0.00	£0.04	£0.00	£3.01
Local Store, Bexhill	£2.34	£2.02	£0.10	£0.00	£0.00	£0.00	£4.46
Bexhill Town Centre							
Budgen, Battle, Market Square	£0.00	£1.01	£0.00	£4.49	£0.00	£0.10	£5.61
Co-op, Battle, High St	£0.06	£0.09	£0.00	£0.46	£0.00	£0.00	£0.61
Local Store, Battle	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£0.47
Battle Town Centre							
Jempson/Budgen, Rye, Station Approach	£0.00	£0.00	£0.00	£0.07	£5.33	£0.00	£5.40
Local Store, Rye	£0.00	£0.00	£0.00	£0.00	£2.41	£0.19	£2.61
Rye Town Centre							
Lidl, Sidley, Ninfield Rd	£0.77	£2.81	£0.00	£0.23	£0.04	£0.00	£3.86
Local Store, Sidley	£0.09	£0.75	£0.00	£0.00	£0.00	£0.00	£0.84
Co-op, Sidley, Ninfield Rd	£0.49	£1.25	£0.00	£0.00	£0.00	£0.00	£1.74
Sidley District Centre, Bexhill							
Co-op, Little Common, Cooden Sea Rd	£0.00	£3.32	£0.00	£0.00	£0.52	£0.00	£3.84
Local Store, Little Common	£0.19	£0.99	£0.00	£0.00	£0.00	£0.00	£1.18
Little Common District Centre, Bexhill							
Aldi, Bexhill, London Rd	£1.38	£2.99	£0.00	£0.16	£0.00	£0.00	£4.53
Tesco, Bexhill, Collington Ave	£0.68	£2.29	£0.00	£0.16	£0.04	£0.14	£3.31
Jempson, Peasmarsh, Main St	£0.00	£0.15	£0.30	£0.46	£5.37	£0.23	£6.50
Tesco, Bexhill, Ravenside	£11.84	£14.04	£0.22	£1.03	£0.26	£0.14	£27.52
M&S, Bexhill, Ravenside	£3.75	£3.75	£0.56	£0.52	£0.82	£0.68	£10.08
Tesco Express, Battle, Battle Hill	£0.00	£0.49	£0.00	£1.29	£0.09	£0.10	£1.98
Out Of Centre Stores In Rother							
Local Store, Burwash	£0.00	£0.00	£2.01	£0.08	£0.00	£0.00	£2.09
Local Store, Robertsbridge	£0.06	£0.00	£0.00	£1.92	£0.00	£0.00	£1.98
Local Store, Ticehurst	£0.00	£0.00	£1.74	£0.00	£0.00	£0.00	£1.74
Local Store, Sedlescombe	£0.00	£0.00	£0.00	£0.84	£0.00	£0.00	£0.84
Local Store, Staplecross	£0.00	£0.00	£0.00	£0.29	£0.00	£0.00	£0.29
Local Store, Westfield	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31	£0.31
Local Stores/Spar, Northiam	£0.00	£0.00	£0.00	£0.00	£0.71	£0.00	£0.71
Local Store, Catsfield	£0.00	£0.41	£0.00	£0.10	£0.00	£0.00	£0.50
Local Store, Fairlight	£0.00	£0.00	£0.00	£0.00	£0.00	£1.55	£1.55
Local Stores Winchelsea/Beach	£0.00	£0.00	£0.00	£0.00	£0.53	£0.41	£0.94
Local Store, Etchingham	£0.00	£0.00	£0.87	£0.00	£0.00	£0.00	£0.87
Local Store, Hurst Green	£0.00	£0.00	£0.48	£0.10	£0.00	£0.00	£0.57
Local Stores/Village Centres In Rother							
Stores outside the District							
Asda, Eastbourne, Crumbles	£0.73	£3.34	£0.20	£0.08	£0.00	£0.18	£4.52
Sainsbury, Hastings, St Leonards, John Macadam Way	£0.28	£1.57	£0.98	£6.43	£4.12	£2.91	£16.29
Morrison, Hastings, Queens Road	£0.19	£0.46	£0.19	£1.26	£1.56	£2.91	£6.57
Tesco, Hastings, St Leonards, Churchwood Drive	£0.14	£1.22	£0.98	£3.32	£1.82	£1.84	£9.32
Asda Silverhill, Hastings	£0.27	£1.56	£1.17	£4.98	£2.39	£2.29	£12.66
Large Stores Outside Rother with Significant Influence							
Asda, Ashford, Kimberley Way	£0.00	£0.00	£0.00	£0.00	£0.59	£0.09	£0.68
Budgen, Hawkhurst, Rye Rd	£0.00	£0.09	£1.38	£0.41	£1.23	£0.10	£3.20
Budgen, Heathfield, Station Rd	£0.00	£0.05	£0.21	£0.00	£0.09	£0.00	£0.35
Co-op, Eastbourne, Albert Parade	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
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	£3.37	£0.23	£0.00	£0.00	£3.61
Co-op, Ore, Fairlight Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.44	£0.49
Co-op, Polegate, The Centre	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12
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	£0.45	£0.00	£0.00	£0.00	£0.45
Iceland, Hastings, Castle St	£0.00	£0.00	£0.06	£0.00	£0.00	£0.18	£0.23
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	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06
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	£0.05	£0.00	£0.08	£0.31	£0.19	£0.63
Local Store, Hastings	£0.00	£0.00	£0.00	£0.38	£0.38	£0.21	£0.97
Marks & Spencer, Eastbourne	£0.08	£0.37	£0.00	£0.00	£0.00	£0.00	£0.45
Marks & Spencer, Priory Meadow Shopping Centre, Hastings	£0.01	£0.10	£0.11	£0.08	£0.16	£0.10	£0.56
Sainsbury, Ashford, Simon Well Ave	£0.00	£0.05	£0.00	£0.00	£0.25	£0.00	£0.31
Sainsbury, Eastbourne, Arndale Centre	£0.00	£0.33	£0.00	£0.00	£0.04	£0.00	£0.38
Sainsbury, Eastbourne, Hampden Park	£0.00	£0.85	£0.20	£0.08	£0.00	£0.00	£1.13
Sainsbury, New Romney, Dymchurch Rd	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Sainsbury, Tunbridge Wells, Linden Park Rd	£0.00	£0.00	£1.63	£0.16	£0.00	£0.00	£1.78
Sainsbury, Tunbridge Wells, St Johns Road	£0.00	£0.00	£0.50	£0.16	£0.04	£0.14	£0.84
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	£0.10	£0.27	£0.00	£0.10	£0.47
Spar, St Leonards, Kings Rd	£0.09	£0.00	£0.00	£0.00	£0.00	£0.10	£0.19
Tesco, Ashford, Hythe Rd	£0.00	£0.00	£0.00	£0.00	£1.33	£0.00	£1.33
Tesco, Eastbourne, Kingfisher Drive, Langney Shopping Centre	£0.34	£1.12	£0.15	£0.08	£0.00	£0.00	£1.68
Tesco, Eastbourne, Lottbridge Drove	£0.06	£0.49	£0.00	£0.00	£0.00	£0.00	£0.55
Tesco, St Leonards, Silverhill	£0.00	£0.05	£0.00	£0.33	£0.09	£0.23	£0.70
Tesco, Tenterden, Smallhythe Rd	£0.00	£0.00	£0.20	£0.23	£4.14	£0.00	£4.58
Tesco, Tunbridge Wells, Pembury Rd	£0.00	£0.00	£0.65	£0.00	£0.00	£0.00	£0.65
Tesco Express, Heathfield, Station Rd	£0.09	£0.00	£0.06	£0.10	£0.00	£0.00	£0.24
Tesco Express, St Leonards, Fernside Avenue	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.15
Waitrose, Eastbourne, High St	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£0.31
Waitrose, Hailsham, Vicarage Field	£0.12	£0.81	£0.06	£0.00	£0.04	£0.00	£1.03
Waitrose, Tenterden, High St	£0.00	£0.00	£0.06	£0.08	£1.10	£0.14	£1.37
Waitrose, Crowborough	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.17
Other	£0.52	£1.62	£3.04	£1.33	£1.97	£1.62	£10.10
Other Stores/Locations Outside Rother							

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

10. Convenience benchmark turnovers 2012 (including commitments)

Store/Location	Sales Area	% Convenience Goods	Convenience Goods Sales Area	Estimated Convenience Goods Sales Density	Convenience Goods Benchmark Turnover
	sqm	%	sqm	£/sqm	£M
Sainsbury, Bexhill, Buckhurst Place	1,467	85%	1,247	£13,190	£16.45
Co-op, Bexhill, Devonshire Rd	206	90%	185	£7,889	£1.46
Co-op, Bexhill, Western Rd	376	95%	357	£7,889	£2.82
Local Store, Bexhill					£3.64
Bexhill Town Centre					£24.37
Budgen/Jempson, Battle, Market Square	650	85%	553	£5,084	£2.81
Co-op, Battle, High St	190	90%	171	£7,889	£1.35
Local Store, Battle					£0.38
Battle Town Centre					£4.54
Jempson/Budgen, Rye, Station Approach	1,400	85%	1,190	£5,084	£6.05
Sainsbury's Rye, Ferry Road	1,727	80%	1,382	£13,141	£18.20
Local Store, Rye					£2.18
Rye Town Centre					£26.43
Lidl, Sidley, Ninfield Rd	890	80%	712	£5,084	£3.62
Local Store, Sidley					£0.71
Co-op, Sidley, Ninfield Rd	215	95%	204	£7,889	£1.61
Sidley District Centre, Bexhill					£5.94
Co-op, Little Common, Cooden Sea Rd	244	95%	232	£7,889	£1.83
Local Store, Little Common					£0.99
Little Common District Centre, Bexhill					£2.82
Aldi, Bexhill, London Rd	1,300	85%	1,105	£9,465	£10.46
Tesco, Bexhill, Collington Ave	221	95%	210	£13,190	£2.77
Jempson, Peasmarsh, Main St	3,425	80%	2,740	£5,084	£13.93
Tesco, Bexhill, Ravenside	2,218	75%	1,664	£13,190	£21.95
M&S, Bexhill, Ravenside	3,121	24%	743	£11,165	£8.31
Tesco Express, Battle, Battle Hill	205	95%	195	£13,190	£2.57
Out Of Centre Stores In Rother					£59.98
Local Store, Burwash					£1.79
Local Store, Robertsbridge					£1.60
Local Stores/Londis, Ticehurst					£1.49
Local Store, Sedlescombe					£0.68
Local Store, Staplecross					£0.23
Local Store, Westfield					£0.27
Local Stores/Spar, Northiam					£0.59
Local Store, Catsfield					£0.42
Local Store, Fairlight					£1.33
Local Stores Winchelsea/Beach					£0.79
Local Store, Etchingham					£0.74
Local Store, Hurst Green					£0.49
Local Stores/Village Centres In Rother					£10.42
Rother District Total					£131.68

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

11. Convenience Capacity

Main Stores and Towns	2012	2013	2018				2023				2028			
	Benchmark Turnover £M	Benchmark Turnover £M	Market Share £M	Surplus £M	Benchmark Turnover £M	Market Share £M	Surplus £M	Benchmark Turnover £M	Market Share £M	Surplus £M	Benchmark Turnover £M	Market Share £M	Surplus £M	
Sainsbury, Bexhill, Buckhurst Place	£16.45	£16.49	£23.54	£7.06	£16.65	£23.05	£6.40	£16.82	£24.67	£7.85	£16.99	£26.53	£9.54	
Co-op, Bexhill, Devonshire Rd	£1.46	£1.47	£3.96	£2.50	£1.48	£4.03	£2.55	£1.50	£4.34	£2.84	£1.51	£4.69	£3.18	
Co-op, Bexhill, Western Rd	£2.82	£2.82	£2.48	-£0.35	£2.85	£2.61	-£0.24	£2.88	£2.80	-£0.08	£2.91	£3.01	£0.10	
Local Store, Bexhill	£3.64	£3.64	£3.64	-£0.01	£3.68	£3.85	£0.17	£3.72	£4.13	£0.41	£3.75	£4.46	£0.70	
Bexhill Town Centre	£24.37	£24.42	£33.61	£9.20	£24.66	£33.54	£8.88	£24.91	£35.93	£11.02	£25.16	£38.68	£13.52	
Capacity (sqm net)				739			706			868			1054	
Aldi, Bexhill, London Rd	£10.46	£10.48	£4.09	-£6.39	£10.58	£3.95	-£6.63	£10.69	£4.22	-£6.47	£10.80	£4.53	-£6.27	
Tesco, Bexhill, Collington Ave	£2.77	£2.77	£2.77	-£0.01	£2.80	£2.90	£0.10	£2.83	£3.09	£0.26	£2.86	£3.31	£0.45	
Tesco, Bexhill, Ravenside	£21.95	£21.99	£25.14	£3.15	£22.21	£23.84	£1.63	£22.43	£25.55	£3.12	£22.66	£27.52	£4.86	
M&S Bexhill, Ravenside					£8.41	£8.75	£0.33	£8.50	£9.36	£0.87	£8.58	£10.08	£1.49	
Out of Centre Bexhill Stores	£35.17	£35.24	£32.00	-£3.25	£44.01	£39.44	-£4.57	£44.45	£42.23	-£2.23	£44.90	£45.43	£0.53	
Bexhill Total Capacity (£M)				£5.95			£4.30			£8.80			£14.06	
Bexhill Total Capacity (sqm net)				478			342			692			1096	

Notes
0.2% pa sales efficiency
M&S expected to commence trading in 2016
Average sales density of main foodstore operators (Asda, Morrisons, Sainsbury's, Tesco & Waitrose) used to calculate capacity in sqm. 0.2% pa sales efficiency allowance made.

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

12. Bexhill Convenience Market Share

Option 1: Increased Convenience Retention (90%)	2013	2018	2023	2028
Total Convenience Expenditure Generated in Bexhill home zones (£M)	£90.85	£95.62	£102.21	£109.81
Convenience retention in Bexhill home zones (£M)	£72.51	£77.98	£83.45	£89.76
Convenience retention in Bexhill home zones (%)	80%	82%	82%	82%
Convenience retention in Bexhill town centre (£M)	£33.36	£33.27	£35.64	£38.38
Convenience retention in Bexhill town centre (%)	37%	35%	35%	35%
Scope for increasing town centre market share (%)	10%	8%	8%	8%
Additional capacity (£M)	£9.26	£8.08	£8.54	£9.07
Additional capacity (sqm)	743	643	672	707
Resultant convenience retention in Bexhill home zones (%)	90%	90%	90%	90%
Resultant convenience retention in Bexhill town centre (%)	47%	43%	43%	43%
Option 2: High Convenience Retention (90%)	2013	2018	2023	2028
Total Convenience Expenditure Generated in Bexhill home zones (£M)	£90.85	£95.62	£102.21	£109.81
Convenience retention in Bexhill home zones (£M)	£72.51	£77.98	£83.45	£89.76
Convenience retention in Bexhill home zones (%)	80%	82%	82%	82%
Convenience retention in Bexhill town centre (£M)	£33.36	£33.27	£35.64	£38.38
Convenience retention in Bexhill town centre (%)	37%	35%	35%	35%
Scope for increasing town centre market share (%)	15%	13%	13%	13%
Additional capacity (£M)	£13.80	£12.87	£13.65	£14.56
Additional capacity (sqm)	1,108	1,023	1,074	1,135
Resultant convenience retention in Bexhill home zones (%)	95%	95%	95%	95%
Resultant convenience retention in Bexhill town centre (%)	52%	48%	48%	48%

Notes

Reduction in town centre market share between 2013 and 2018 relates to the impact of commitments

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016

Clothing & Footwear	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	26.28%	16.45%	0.00%	2.89%	0.00%	0.00%	10.69%	£2.32	£2.84	£0.00	£0.24	£0.00	£0.00	£5.40	£2.80	£3.29	£0.00	£0.29	£0.00	£0.00	£6.38
Battle - Town Centre	0.00%	0.75%	1.31%	8.78%	0.00%	1.62%	1.62%	£0.00	£0.13	£0.08	£0.74	£0.00	£0.07	£1.03	£0.00	£0.15	£0.10	£0.88	£0.00	£0.08	£1.21
Rye - Town Centre	0.00%	0.00%	0.00%	0.96%	8.62%	0.00%	1.62%	£0.00	£0.00	£0.00	£0.08	£0.73	£0.00	£0.81	£0.00	£0.00	£0.00	£0.10	£0.86	£0.00	£0.95
Ravenside Retail Park, Bexhill	0.64%	1.18%	0.00%	0.00%	0.77%	1.62%	0.76%	£0.06	£0.20	£0.00	£0.00	£0.07	£0.07	£0.39	£0.07	£0.24	£0.00	£0.00	£0.08	£0.08	£0.46
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	0.43%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
Little Common - Local Centre	0.00%	0.43%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09
Robertsbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	26.91%	19.23%	1.31%	12.63%	9.39%	3.24%	14.90%	£2.38	£3.31	£0.08	£1.07	£0.80	£0.14	£7.78	£2.87	£3.85	£0.10	£1.27	£0.93	£0.16	£9.18
Eastbourne - Town Centre	54.57%	57.05%	7.87%	15.52%	3.65%	14.47%	33.69%	£4.82	£9.83	£0.50	£1.31	£0.31	£0.62	£17.40	£5.82	£11.41	£0.58	£1.56	£0.36	£0.72	£20.45
Hastings - Town Centre	14.47%	16.88%	9.18%	35.97%	49.06%	64.47%	27.75%	£1.28	£2.91	£0.58	£3.05	£4.16	£2.78	£14.76	£1.54	£3.38	£0.68	£3.62	£4.87	£3.22	£17.30
Tunbridge Wells - Town Centre	0.00%	1.50%	75.08%	24.30%	9.39%	3.24%	12.85%	£0.00	£0.26	£4.77	£2.06	£0.80	£0.14	£8.02	£0.00	£0.30	£5.53	£2.44	£0.93	£0.16	£9.37
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.96%	10.83%	3.24%	2.27%	£0.00	£0.00	£0.00	£0.08	£0.92	£0.14	£1.14	£0.00	£0.00	£0.00	£0.10	£1.07	£0.16	£1.33
Ashford - Town Centre	0.00%	0.00%	0.00%	0.96%	1.44%	0.00%	0.43%	£0.00	£0.00	£0.00	£0.08	£0.12	£0.00	£0.20	£0.00	£0.00	£0.00	£0.10	£0.14	£0.00	£0.24
Bluewater Shopping Centre	0.00%	0.75%	0.00%	0.96%	1.44%	1.62%	0.76%	£0.00	£0.13	£0.00	£0.08	£0.12	£0.07	£0.40	£0.00	£0.15	£0.00	£0.10	£0.14	£0.08	£0.47
Brighton - Town Centre	0.64%	0.75%	0.00%	1.93%	0.77%	0.00%	0.76%	£0.06	£0.13	£0.00	£0.16	£0.07	£0.00	£0.41	£0.07	£0.15	£0.00	£0.19	£0.08	£0.00	£0.49
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.77%	1.62%	0.22%	£0.00	£0.00	£0.00	£0.00	£0.07	£0.07	£0.14	£0.00	£0.00	£0.00	£0.00	£0.08	£0.08	£0.16
Heathfield - Town Centre	0.00%	0.00%	2.62%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.19
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	2.77%	0.43%	1.31%	1.93%	3.65%	3.24%	1.94%	£0.24	£0.07	£0.08	£0.16	£0.31	£0.14	£1.01	£0.29	£0.09	£0.10	£0.19	£0.36	£0.16	£1.19
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.64%	0.00%	0.00%	1.93%	0.77%	0.00%	0.54%	£0.06	£0.00	£0.00	£0.16	£0.07	£0.00	£0.29	£0.07	£0.00	£0.00	£0.19	£0.08	£0.00	£0.34
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.31%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.10
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.77%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.15
St Leonards - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tenterden - Town Centre	0.00%	0.00%	0.00%	0.96%	5.08%	0.00%	0.97%	£0.00	£0.00	£0.00	£0.08	£0.43	£0.00	£0.51	£0.00	£0.00	£0.00	£0.10	£0.50	£0.00	£0.60
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.43%	1.31%	0.00%	0.00%	1.62%	0.43%	£0.00	£0.07	£0.08	£0.00	£0.00	£0.07	£0.23	£0.00	£0.09	£0.10	£0.00	£0.00	£0.08	£0.26
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.00%	1.50%	0.00%	0.96%	0.77%	0.00%	0.76%	£0.00	£0.26	£0.00	£0.08	£0.07	£0.00	£0.41	£0.00	£0.30	£0.00	£0.10	£0.08	£0.00	£0.47
Tunbridge Wells, Longfield Retail Park	0.00%	0.75%	0.00%	0.96%	0.00%	1.62%	0.54%	£0.00	£0.13	£0.00	£0.08	£0.00	£0.07	£0.28	£0.00	£0.15	£0.00	£0.10	£0.00	£0.08	£0.33
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Canterbury	0.00%	0.00%	0.00%	0.00%	2.21%	1.62%	0.54%	£0.00	£0.00	£0.00	£0.00	£0.19	£0.07	£0.26	£0.00	£0.00	£0.00	£0.00	£0.22	£0.08	£0.30
Others	4.04%	5.34%	6.56%	11.56%	28.51%	14.58%	10.80%	£0.36	£0.92	£0.42	£0.98	£2.42	£0.63	£5.72	£0.43	£1.07	£0.48	£1.16	£2.83	£0.73	£6.70

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Chemist & Personal Care																					
Bexhill - Town Centre	66.63%	51.22%	1.23%	3.64%	1.32%	1.52%	30.40%	£4.09	£6.92	£0.05	£0.21	£0.07	£0.04	£11.39	£4.93	£8.03	£0.06	£0.25	£0.09	£0.05	£13.41
Battle - Town Centre	0.60%	4.68%	0.00%	33.06%	0.00%	1.52%	6.08%	£0.04	£0.63	£0.00	£1.93	£0.00	£0.04	£2.65	£0.04	£0.73	£0.00	£2.30	£0.00	£0.05	£3.13
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	57.01%	1.52%	10.44%	£0.00	£0.00	£0.00	£0.00	£3.15	£0.04	£3.20	£0.00	£0.00	£0.00	£0.00	£3.69	£0.05	£3.74
Ravenside Retail Park, Bexhill	18.19%	10.49%	1.23%	0.91%	0.00%	0.00%	7.09%	£1.12	£1.42	£0.05	£0.05	£0.00	£0.00	£2.64	£1.35	£1.64	£0.06	£0.06	£0.00	£0.00	£3.12
Tesco, Ravenside Retail Park	8.84%	5.80%	1.23%	0.91%	0.00%	0.00%	3.75%	£0.54	£0.78	£0.05	£0.05	£0.00	£0.00	£1.43	£0.65	£0.91	£0.06	£0.06	£0.00	£0.00	£1.69
Sidley - Local Centre	1.31%	5.40%	0.00%	0.00%	0.00%	0.00%	2.03%	£0.08	£0.73	£0.00	£0.00	£0.00	£0.00	£0.81	£0.10	£0.85	£0.00	£0.00	£0.00	£0.00	£0.94
Little Common - Local Centre	0.00%	9.37%	0.00%	0.00%	0.00%	0.00%	3.04%	£0.00	£1.27	£0.00	£0.00	£0.00	£0.00	£1.27	£0.00	£1.47	£0.00	£0.00	£0.00	£0.00	£1.47
Robertsbridge	0.00%	0.00%	0.00%	13.75%	0.00%	0.00%	1.82%	£0.00	£0.00	£0.00	£0.80	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£0.96	£0.00	£0.00	£0.96
Peamarsch	0.00%	0.00%	1.23%	0.00%	1.93%	0.00%	0.51%	£0.00	£0.00	£0.05	£0.00	£0.11	£0.00	£0.16	£0.00	£0.00	£0.06	£0.00	£0.12	£0.00	£0.19
Ticehurst	0.00%	0.00%	19.79%	0.00%	0.00%	0.00%	1.93%	£0.00	£0.00	£0.88	£0.00	£0.00	£0.00	£0.88	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£1.02
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	95.58%	86.97%	24.72%	52.28%	60.26%	4.57%	67.07%	£5.86	£11.75	£1.10	£3.06	£3.33	£0.13	£25.23	£7.07	£13.63	£1.27	£3.63	£3.90	£0.15	£29.66
Eastbourne - Town Centre	1.31%	3.97%	1.23%	4.55%	1.32%	1.52%	2.63%	£0.08	£0.54	£0.05	£0.27	£0.07	£0.04	£1.05	£0.10	£0.62	£0.06	£0.32	£0.09	£0.05	£1.23
Hastings - Town Centre	1.31%	4.68%	6.15%	16.58%	21.65%	51.63%	12.36%	£0.08	£0.63	£0.27	£0.97	£1.20	£1.47	£4.63	£0.10	£0.73	£0.32	£1.15	£1.40	£1.71	£5.41
Tunbridge Wells - Town Centre	0.00%	0.00%	33.33%	5.56%	0.61%	0.00%	4.05%	£0.00	£0.00	£1.48	£0.33	£0.03	£0.00	£1.84	£0.00	£0.00	£1.72	£0.39	£0.04	£0.00	£2.15
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	1.52%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.05
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.61%	0.00%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Brighton - Town Centre	0.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Heathfield - Town Centre	0.00%	0.00%	13.64%	0.91%	1.93%	0.00%	1.82%	£0.00	£0.00	£0.61	£0.05	£0.11	£0.00	£0.77	£0.00	£0.00	£0.70	£0.06	£0.12	£0.00	£0.89
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Morrisons, Hastings	0.00%	0.00%	1.23%	0.00%	0.00%	3.15%	0.41%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.09	£0.14	£0.00	£0.00	£0.06	£0.00	£0.00	£0.10	£0.17
Sainsburys, Hampden Park, Eastbourne	0.00%	0.71%	0.00%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Sainsburys, John McAdam Way, St Leonards, Hastings	0.60%	0.71%	2.46%	13.75%	3.25%	15.65%	4.15%	£0.04	£0.10	£0.11	£0.80	£0.18	£0.45	£1.67	£0.04	£0.11	£0.13	£0.96	£0.21	£0.52	£1.97
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	2.46%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.13	£0.00	£0.00	£0.00	£0.13
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.71%	0.00%	0.00%	0.00%	0.00%	0.20%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
St Leonards - Town Centre	0.00%	0.00%	1.23%	0.00%	0.61%	0.00%	0.20%	£0.00	£0.00	£0.05	£0.00	£0.03	£0.00	£0.09	£0.00	£0.00	£0.06	£0.00	£0.04	£0.00	£0.10
Tenterden - Town Centre	0.00%	0.00%	1.23%	0.00%	7.22%	0.00%	1.42%	£0.00	£0.00	£0.05	£0.00	£0.40	£0.00	£0.45	£0.00	£0.00	£0.06	£0.00	£0.47	£0.00	£0.53
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.60%	0.41%	3.69%	3.64%	0.61%	10.98%	2.03%	£0.04	£0.06	£0.16	£0.21	£0.03	£0.31	£0.82	£0.04	£0.06	£0.19	£0.25	£0.04	£0.36	£0.95
Tesco, Lottbridge Drove, Ebne	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06
Tesco, Tunbridge Wells	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.06
Other	0.00%	1.43%	7.38%	2.73%	1.93%	10.98%	2.74%	£0.00	£0.19	£0.33	£0.16	£0.11	£0.31	£1.10	£0.00	£0.22	£0.38	£0.19	£0.12	£0.36	£1.28
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Canterbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Others	1.81%	4.38%	34.56%	21.03%	16.16%	42.28%	13.88%	£0.11	£0.59	£1.54	£1.23	£0.89	£1.21	£5.57	£0.13	£0.69	£1.78	£1.46	£1.04	£1.40	£6.51

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Books, Stationery, Cards, DVDs, CDs etc	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	57.87%	53.31%	0.00%	3.53%	0.00%	0.00%	29.82%	£0.93	£1.84	£0.00	£0.06	£0.00	£0.00	£2.83	£1.12	£2.14	£0.00	£0.08	£0.00	£0.00	£3.33
Battle - Town Centre	4.98%	3.37%	0.00%	21.41%	0.00%	1.81%	4.97%	£0.08	£0.12	£0.00	£0.38	£0.00	£0.02	£0.60	£0.10	£0.13	£0.00	£0.46	£0.00	£0.02	£0.71
Rye - Town Centre	0.81%	0.00%	0.00%	1.22%	37.00%	0.00%	6.51%	£0.01	£0.00	£0.00	£0.02	£0.68	£0.00	£0.71	£0.02	£0.00	£0.00	£0.03	£0.79	£0.00	£0.83
Ravenside Retail Park, Bexhill	4.98%	3.03%	0.00%	0.00%	0.00%	0.00%	2.01%	£0.08	£0.10	£0.00	£0.00	£0.00	£0.00	£0.18	£0.10	£0.12	£0.00	£0.00	£0.00	£0.00	£0.22
Tesco, Ravenside Retail Park	5.79%	5.16%	0.00%	1.22%	0.00%	0.00%	2.96%	£0.09	£0.18	£0.00	£0.02	£0.00	£0.00	£0.29	£0.11	£0.21	£0.00	£0.03	£0.00	£0.00	£0.35
Sidley - Local Centre	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.47%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Little Common - Local Centre	0.00%	5.16%	0.00%	0.00%	0.00%	0.00%	1.78%	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.21
Robertsbridge	0.00%	0.00%	1.72%	4.74%	0.00%	0.00%	0.71%	£0.00	£0.00	£0.02	£0.09	£0.00	£0.00	£0.11	£0.00	£0.00	£0.03	£0.10	£0.00	£0.00	£0.13
Peasmarsh	0.00%	0.00%	0.00%	0.00%	5.38%	0.00%	0.95%	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12
Ticehurst	0.00%	0.00%	5.03%	0.00%	0.90%	0.00%	0.59%	£0.00	£0.00	£0.07	£0.00	£0.02	£0.00	£0.09	£0.00	£0.00	£0.08	£0.00	£0.02	£0.00	£0.10
Northium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	74.42%	71.27%	6.75%	32.12%	43.28%	1.81%	50.77%	£1.20	£2.46	£0.09	£0.58	£0.79	£0.02	£5.13	£1.44	£2.86	£0.11	£0.68	£0.93	£0.02	£6.04
Eastbourne - Town Centre	17.36%	16.16%	1.72%	9.49%	0.00%	3.61%	10.53%	£0.28	£0.56	£0.02	£0.17	£0.00	£0.03	£1.06	£0.34	£0.65	£0.03	£0.20	£0.00	£0.04	£1.25
Hastings - Town Centre	4.98%	5.16%	11.90%	32.24%	33.42%	87.36%	20.59%	£0.08	£0.18	£0.16	£0.58	£0.61	£0.80	£2.41	£0.10	£0.21	£0.19	£0.69	£0.71	£0.92	£2.82
Tunbridge Wells - Town Centre	0.00%	0.45%	55.95%	10.71%	2.69%	0.00%	6.86%	£0.00	£0.02	£0.77	£0.19	£0.05	£0.00	£1.03	£0.00	£0.02	£0.89	£0.23	£0.06	£0.00	£1.20
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	1.79%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Bluewater Shopping Centre	0.00%	0.00%	0.00%	1.22%	0.90%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.02	£0.02	£0.00	£0.04	£0.00	£0.00	£0.00	£0.03	£0.02	£0.00	£0.05
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Heathfield - Town Centre	0.00%	0.00%	6.75%	0.00%	0.00%	0.00%	0.59%	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.90%	0.00%	0.00%	1.79%	0.00%	0.59%	£0.00	£0.03	£0.00	£0.00	£0.03	£0.00	£0.06	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.07
Morrisons, Hastings	0.00%	0.90%	0.00%	1.22%	0.00%	0.00%	0.47%	£0.00	£0.03	£0.00	£0.02	£0.00	£0.00	£0.05	£0.00	£0.04	£0.00	£0.03	£0.00	£0.00	£0.06
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.81%	0.90%	0.00%	3.53%	0.00%	0.00%	0.95%	£0.01	£0.03	£0.00	£0.06	£0.00	£0.00	£0.11	£0.02	£0.04	£0.00	£0.08	£0.00	£0.00	£0.13
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.45%	0.00%	0.00%	0.00%	0.00%	0.12%	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.02
St Leonards - Town Centre	0.00%	0.00%	0.00%	0.00%	1.79%	0.00%	0.36%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Tenterden - Town Centre	1.62%	0.00%	0.00%	1.22%	8.07%	0.00%	1.78%	£0.03	£0.00	£0.00	£0.02	£0.15	£0.00	£0.20	£0.03	£0.00	£0.00	£0.03	£0.17	£0.00	£0.23
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	2.69%	0.00%	0.47%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	1.72%	3.53%	0.90%	5.42%	1.18%	£0.00	£0.00	£0.02	£0.06	£0.02	£0.05	£0.15	£0.00	£0.00	£0.03	£0.08	£0.02	£0.06	£0.18
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.81%	2.13%	6.75%	3.53%	2.69%	1.81%	2.60%	£0.01	£0.07	£0.09	£0.06	£0.05	£0.02	£0.31	£0.02	£0.09	£0.11	£0.08	£0.06	£0.02	£0.36
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	0.00%	1.22%	0.00%	0.00%	0.12%	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.03
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Wadhurst	0.00%	0.00%	8.47%	0.00%	0.00%	0.00%	0.71%	£0.00	£0.00	£0.12	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.14
Asda, Eastbourne	0.00%	1.68%	0.00%	0.00%	0.00%	0.00%	0.59%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07
Others	3.24%	6.96%	23.68%	15.45%	20.61%	7.22%	11.24%	£0.05	£0.24	£0.33	£0.28	£0.38	£0.07	£1.34	£0.06	£0.28	£0.38	£0.33	£0.44	£0.08	£1.57

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares								Implied turnover 2011								Implied turnover 2016							
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total		Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total		Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	
Recreation & Leisure Goods																								
Bexhill - Town Centre	48.50%	31.64%	0.00%	4.19%	0.00%	2.32%	19.59%		£2.38	£3.30	£0.00	£0.23	£0.00	£0.07	£5.99		£2.87	£3.83	£0.00	£0.28	£0.00	£0.08	£7.07	
Battle - Town Centre	0.00%	2.10%	0.00%	6.98%	0.00%	2.32%	1.81%		£0.00	£0.22	£0.00	£0.39	£0.00	£0.07	£0.68		£0.00	£0.25	£0.00	£0.46	£0.00	£0.08	£0.80	
Rye - Town Centre	0.00%	0.00%	0.00%	1.40%	27.25%	4.52%	5.66%		£0.00	£0.00	£0.00	£0.08	£1.63	£0.14	£1.85		£0.00	£0.00	£0.00	£0.09	£1.90	£0.17	£2.16	
Ravenside Retail Park, Bexhill	6.12%	4.31%	0.00%	1.40%	0.00%	0.00%	2.60%		£0.30	£0.45	£0.00	£0.08	£0.00	£0.00	£0.83		£0.36	£0.52	£0.00	£0.09	£0.00	£0.00	£0.98	
Tesco, Ravenside Retail Park	1.00%	1.11%	0.00%	0.00%	0.00%	0.00%	0.57%		£0.05	£0.12	£0.00	£0.00	£0.00	£0.00	£0.16		£0.06	£0.13	£0.00	£0.00	£0.00	£0.00	£0.19	
Sidley - Local Centre	0.00%	1.11%	0.00%	0.00%	0.00%	0.00%	0.34%		£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.12		£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.13	
Little Common - Local Centre	0.00%	0.55%	0.00%	0.00%	0.00%	0.00%	0.23%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06		£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	
Robertbridge	0.00%	0.55%	1.71%	4.19%	0.00%	0.00%	0.91%		£0.00	£0.06	£0.07	£0.23	£0.00	£0.00	£0.37		£0.00	£0.07	£0.09	£0.28	£0.00	£0.00	£0.43	
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Northiam	0.00%	0.00%	0.00%	0.00%	2.86%	0.00%	0.57%		£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.17		£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.20	
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Rother District	55.62%	41.37%	1.71%	18.14%	30.11%	9.17%	32.28%		£2.73	£4.32	£0.07	£1.02	£1.80	£0.29	£10.22		£3.29	£5.01	£0.09	£1.21	£2.10	£0.34	£12.03	
Eastbourne - Town Centre	25.25%	37.61%	1.71%	16.63%	2.86%	6.85%	20.16%		£1.24	£3.92	£0.07	£0.93	£0.17	£0.22	£6.56		£1.50	£4.55	£0.09	£1.11	£0.20	£0.25	£7.69	
Hastings - Town Centre	14.13%	12.39%	10.39%	36.05%	35.71%	56.60%	23.33%		£0.69	£1.29	£0.45	£2.02	£2.13	£1.79	£8.37		£0.84	£1.50	£0.52	£2.40	£2.49	£2.07	£9.82	
Tunbridge Wells - Town Centre	0.00%	1.11%	56.85%	18.02%	3.74%	6.85%	9.74%		£0.00	£0.12	£2.46	£1.01	£0.22	£0.22	£4.03		£0.00	£0.13	£2.85	£1.20	£0.26	£0.25	£4.70	
Ashford - Designer Outlet Village	0.00%	0.00%	1.71%	0.00%	4.73%	4.52%	1.36%		£0.00	£0.00	£0.07	£0.00	£0.28	£0.14	£0.50		£0.00	£0.00	£0.09	£0.00	£0.33	£0.17	£0.58	
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	8.46%	0.00%	1.59%		£0.00	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50		£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.59	
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Brighton - Town Centre	0.00%	1.66%	0.00%	0.00%	0.99%	0.00%	0.68%		£0.00	£0.17	£0.00	£0.00	£0.06	£0.00	£0.23		£0.00	£0.20	£0.00	£0.00	£0.07	£0.00	£0.27	
Hailsham - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Heathfield - Town Centre	0.00%	0.00%	10.39%	1.40%	0.00%	0.00%	1.25%		£0.00	£0.00	£0.45	£0.08	£0.00	£0.00	£0.53		£0.00	£0.00	£0.52	£0.09	£0.00	£0.00	£0.61	
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
London	4.00%	0.00%	1.71%	0.00%	1.87%	4.52%	1.59%		£0.20	£0.00	£0.07	£0.00	£0.11	£0.14	£0.52		£0.24	£0.00	£0.09	£0.00	£0.13	£0.17	£0.62	
Morrisons, Hastings	0.00%	0.55%	0.00%	0.00%	0.00%	2.32%	0.34%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.07	£0.13		£0.00	£0.07	£0.00	£0.00	£0.00	£0.08	£0.15	
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	1.40%	0.00%	2.32%	0.34%		£0.00	£0.00	£0.00	£0.08	£0.00	£0.07	£0.15		£0.00	£0.00	£0.00	£0.09	£0.00	£0.08	£0.18	
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	2.10%	0.00%	0.00%	0.00%	0.00%	0.68%		£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22		£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£0.25	
St Leonards - Town Centre	0.00%	0.00%	1.71%	0.00%	0.99%	0.00%	0.34%		£0.00	£0.00	£0.07	£0.00	£0.06	£0.00	£0.13		£0.00	£0.00	£0.09	£0.00	£0.07	£0.00	£0.15	
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.40%	4.73%	0.00%	1.02%		£0.00	£0.00	£0.00	£0.08	£0.28	£0.00	£0.36		£0.00	£0.00	£0.00	£0.09	£0.33	£0.00	£0.42	
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.99%	0.00%	0.23%		£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06		£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.07	
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	1.71%	0.00%	0.99%	2.32%	0.57%		£0.00	£0.00	£0.07	£0.00	£0.06	£0.07	£0.21		£0.00	£0.00	£0.09	£0.00	£0.07	£0.08	£0.24	
Tesco, Lottbridge Drove, Ebne	0.00%	0.55%	0.00%	0.00%	0.00%	0.00%	0.23%		£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06		£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07	
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Other	0.00%	2.65%	12.10%	5.58%	2.86%	4.52%	3.74%		£0.00	£0.28	£0.52	£0.31	£0.17	£0.14	£1.43		£0.00	£0.32	£0.61	£0.37	£0.20	£0.17	£1.66	
Tunbridge Wells, Longfield Retail Park	1.00%	0.00%	0.00%	1.40%	0.99%	0.00%	0.57%		£0.05	£0.00	£0.00	£0.08	£0.06	£0.00	£0.19		£0.06	£0.00	£0.00	£0.09	£0.07	£0.00	£0.22	
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Others	5.01%	7.52%	29.34%	11.16%	27.58%	20.54%	14.50%		£0.25	£0.78	£1.27	£0.63	£1.65	£0.65	£5.22		£0.30	£0.91	£1.47	£0.74	£1.92	£0.75	£6.10	

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
China, Glass & Home Textiles																					
Bexhill - Town Centre	19.96%	12.62%	0.00%	1.14%	0.00%	0.00%	7.91%	£0.64	£0.89	£0.00	£0.04	£0.00	£0.00	£1.57	£0.78	£1.03	£0.00	£0.05	£0.00	£0.00	£1.85
Battle - Town Centre	1.76%	2.15%	1.47%	19.57%	0.00%	3.48%	4.06%	£0.06	£0.15	£0.04	£0.68	£0.00	£0.06	£0.98	£0.07	£0.18	£0.04	£0.80	£0.00	£0.07	£1.16
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	10.49%	0.00%	1.82%	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.39	£0.00	£0.39
Ravenside Retail Park, Bexhill	2.65%	3.49%	0.00%	0.00%	0.00%	0.00%	1.60%	£0.09	£0.24	£0.00	£0.00	£0.00	£0.00	£0.33	£0.10	£0.28	£0.00	£0.00	£0.00	£0.00	£0.39
Tesco, Ravenside Retail Park	5.18%	5.64%	0.00%	0.00%	0.00%	0.00%	2.88%	£0.17	£0.40	£0.00	£0.00	£0.00	£0.00	£0.56	£0.20	£0.46	£0.00	£0.00	£0.00	£0.00	£0.66
Sidley - Local Centre	0.00%	1.33%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.09	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Little Common - Local Centre	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	29.55%	25.64%	1.47%	20.70%	10.49%	3.48%	18.80%	£0.95	£1.80	£0.04	£0.72	£0.33	£0.06	£3.90	£1.15	£2.09	£0.04	£0.85	£0.39	£0.07	£4.59
Eastbourne - Town Centre	41.68%	44.92%	2.94%	13.77%	1.77%	5.16%	25.32%	£1.34	£3.15	£0.08	£0.48	£0.06	£0.08	£5.19	£1.62	£3.66	£0.09	£0.57	£0.07	£0.10	£6.10
Hastings - Town Centre	21.72%	15.69%	11.78%	29.92%	50.77%	67.33%	28.63%	£0.70	£1.10	£0.30	£1.03	£1.61	£1.11	£5.86	£0.84	£1.28	£0.35	£1.23	£1.88	£1.28	£6.87
Tunbridge Wells - Town Centre	0.88%	1.74%	58.78%	16.15%	4.42%	5.16%	10.04%	£0.03	£0.12	£1.52	£0.56	£0.14	£0.08	£2.45	£0.03	£0.14	£1.76	£0.66	£0.16	£0.10	£2.86
Ashford - Designer Outlet Village	0.00%	0.41%	2.94%	1.14%	3.53%	3.48%	1.50%	£0.00	£0.03	£0.08	£0.04	£0.11	£0.06	£0.31	£0.00	£0.03	£0.09	£0.05	£0.13	£0.07	£0.37
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	7.84%	1.69%	1.50%	£0.00	£0.00	£0.00	£0.00	£0.25	£0.03	£0.28	£0.00	£0.00	£0.00	£0.00	£0.29	£0.03	£0.32
Bluewater Shopping Centre	0.00%	0.92%	1.47%	1.14%	3.53%	1.69%	1.39%	£0.00	£0.06	£0.04	£0.04	£0.11	£0.03	£0.28	£0.00	£0.08	£0.04	£0.05	£0.13	£0.03	£0.33
Brighton - Town Centre	0.88%	0.92%	0.00%	2.28%	0.00%	0.00%	0.75%	£0.03	£0.06	£0.00	£0.08	£0.00	£0.00	£0.17	£0.03	£0.08	£0.00	£0.09	£0.00	£0.00	£0.20
Hailsham - Town Centre	0.00%	0.92%	0.00%	0.00%	0.88%	0.00%	0.43%	£0.00	£0.06	£0.00	£0.00	£0.03	£0.00	£0.09	£0.00	£0.08	£0.00	£0.00	£0.03	£0.00	£0.11
Heathfield - Town Centre	0.00%	0.00%	5.89%	0.00%	0.00%	0.00%	0.64%	£0.00	£0.00	£0.15	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.18
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	1.76%	1.33%	0.00%	1.14%	4.42%	3.48%	1.92%	£0.06	£0.09	£0.00	£0.04	£0.14	£0.06	£0.39	£0.07	£0.11	£0.00	£0.05	£0.16	£0.07	£0.45
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	5.80%	0.00%	3.48%	1.07%	£0.00	£0.00	£0.00	£0.20	£0.00	£0.06	£0.26	£0.00	£0.00	£0.00	£0.24	£0.00	£0.07	£0.30
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.47%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
St Leonards - Town Centre	0.88%	0.00%	0.00%	0.00%	1.77%	0.00%	0.43%	£0.03	£0.00	£0.00	£0.00	£0.06	£0.00	£0.08	£0.03	£0.00	£0.00	£0.00	£0.07	£0.00	£0.10
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.14%	4.42%	0.00%	0.85%	£0.00	£0.00	£0.00	£0.04	£0.14	£0.00	£0.18	£0.00	£0.00	£0.00	£0.05	£0.16	£0.00	£0.21
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.88%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Tesco, Churchwood Drive, St Leonards	0.00%	0.92%	1.47%	1.14%	0.00%	1.69%	0.75%	£0.00	£0.06	£0.04	£0.04	£0.00	£0.03	£0.17	£0.00	£0.08	£0.04	£0.05	£0.00	£0.03	£0.20
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	1.76%	2.67%	2.94%	4.55%	3.53%	1.69%	2.88%	£0.06	£0.19	£0.08	£0.16	£0.11	£0.03	£0.62	£0.07	£0.22	£0.09	£0.19	£0.13	£0.03	£0.72
Tunbridge Wells, Longfield Retail Park	0.00%	0.41%	2.94%	0.00%	1.77%	0.00%	0.75%	£0.00	£0.03	£0.08	£0.00	£0.06	£0.00	£0.16	£0.00	£0.03	£0.09	£0.00	£0.07	£0.00	£0.19
Tonbridge Town Centre	0.00%	0.00%	1.47%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Lakeside Shopping Centre/Retail Park	0.88%	1.33%	4.42%	1.14%	0.00%	0.00%	1.18%	£0.03	£0.09	£0.11	£0.04	£0.00	£0.00	£0.28	£0.03	£0.11	£0.13	£0.05	£0.00	£0.00	£0.32
Asda, Eastbourne	0.00%	1.74%	0.00%	0.00%	0.00%	1.69%	0.75%	£0.00	£0.12	£0.00	£0.00	£0.00	£0.03	£0.15	£0.00	£0.14	£0.00	£0.00	£0.00	£0.03	£0.17
Others	6.17%	12.00%	25.03%	19.46%	32.56%	18.86%	17.20%	£0.20	£0.84	£0.65	£0.67	£1.03	£0.31	£3.70	£0.24	£0.98	£0.75	£0.80	£1.21	£0.36	£4.33

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Household Appliances	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	27.36%	20.26%	1.39%	12.00%	3.15%	11.30%	15.02%	£0.45	£0.66	£0.01	£0.16	£0.05	£0.09	£1.43	£0.55	£0.77	£0.01	£0.19	£0.06	£0.10	£1.68
Battle - Town Centre	0.00%	0.76%	0.00%	7.58%	0.00%	0.00%	1.23%	£0.00	£0.02	£0.00	£0.10	£0.00	£0.00	£0.13	£0.00	£0.03	£0.00	£0.12	£0.00	£0.00	£0.15
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	3.15%	0.00%	0.56%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
Ravenside Retail Park, Bexhill	62.54%	48.86%	2.77%	18.53%	15.50%	32.30%	36.10%	£1.04	£1.59	£0.03	£0.25	£0.24	£0.26	£3.40	£1.25	£1.85	£0.03	£0.30	£0.28	£0.30	£4.00
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	2.17%	2.82%	0.00%	0.00%	0.00%	0.00%	1.35%	£0.04	£0.09	£0.00	£0.00	£0.00	£0.00	£0.13	£0.04	£0.11	£0.00	£0.00	£0.00	£0.00	£0.15
Little Common - Local Centre	0.00%	7.91%	0.00%	0.00%	0.00%	1.60%	2.80%	£0.00	£0.26	£0.00	£0.00	£0.00	£0.01	£0.27	£0.00	£0.30	£0.00	£0.00	£0.00	£0.01	£0.31
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	3.15%	0.00%	0.56%	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	92.07%	80.61%	4.16%	38.11%	24.94%	45.20%	57.62%	£1.53	£2.63	£0.04	£0.51	£0.38	£0.36	£5.45	£1.85	£3.05	£0.04	£0.61	£0.44	£0.42	£6.41
Eastbourne - Town Centre	2.82%	5.20%	1.39%	6.53%	1.57%	0.00%	3.48%	£0.05	£0.17	£0.01	£0.09	£0.02	£0.00	£0.34	£0.06	£0.20	£0.01	£0.10	£0.03	£0.00	£0.40
Hastings - Town Centre	2.17%	6.72%	1.39%	31.59%	43.46%	33.90%	17.04%	£0.04	£0.22	£0.01	£0.43	£0.66	£0.27	£1.62	£0.04	£0.25	£0.01	£0.51	£0.77	£0.31	£1.90
Tunbridge Wells - Town Centre	0.00%	0.00%	19.77%	1.05%	0.73%	0.00%	2.13%	£0.00	£0.00	£0.18	£0.01	£0.01	£0.00	£0.21	£0.00	£0.00	£0.21	£0.02	£0.01	£0.00	£0.24
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	1.57%	0.00%	0.22%	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	5.45%	0.00%	0.90%	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.10
Bluewater Shopping Centre	0.00%	0.00%	1.39%	1.05%	0.73%	0.00%	0.45%	£0.00	£0.00	£0.01	£0.01	£0.01	£0.00	£0.04	£0.00	£0.00	£0.01	£0.02	£0.01	£0.00	£0.04
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	0.00%	1.05%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.01	£0.00	£0.00	£0.01	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.02
Heathfield - Town Centre	0.00%	1.19%	28.21%	5.48%	0.73%	1.60%	4.04%	£0.00	£0.04	£0.26	£0.07	£0.01	£0.01	£0.40	£0.00	£0.05	£0.30	£0.09	£0.01	£0.01	£0.46
Langney Centre, Eastbourne	0.76%	0.76%	0.00%	0.00%	0.00%	0.00%	0.45%	£0.01	£0.02	£0.00	£0.00	£0.00	£0.00	£0.04	£0.02	£0.03	£0.00	£0.00	£0.00	£0.00	£0.04
London	0.00%	0.00%	0.00%	0.00%	2.30%	0.00%	0.45%	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.76%	0.00%	0.00%	0.00%	0.00%	0.22%	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03
St Leonards - Town Centre	1.41%	4.33%	0.00%	7.58%	9.32%	14.50%	5.49%	£0.02	£0.14	£0.00	£0.10	£0.14	£0.12	£0.52	£0.03	£0.16	£0.00	£0.12	£0.17	£0.13	£0.61
Tenterden - Town Centre	0.00%	0.00%	0.00%	0.00%	2.30%	0.00%	0.45%	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.43%	0.00%	0.00%	0.73%	1.60%	0.45%	£0.00	£0.01	£0.00	£0.00	£0.00	£0.01	£0.04	£0.00	£0.02	£0.00	£0.00	£0.01	£0.01	£0.04
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.76%	0.00%	2.77%	0.00%	1.57%	3.20%	0.90%	£0.01	£0.00	£0.03	£0.00	£0.02	£0.03	£0.09	£0.02	£0.00	£0.03	£0.00	£0.03	£0.03	£0.10
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	36.65%	6.53%	3.87%	0.00%	4.93%	£0.00	£0.00	£0.34	£0.09	£0.06	£0.00	£0.49	£0.00	£0.00	£0.39	£0.10	£0.07	£0.00	£0.57
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hawkhurst	0.00%	0.00%	4.28%	1.05%	0.73%	0.00%	0.67%	£0.00	£0.00	£0.04	£0.01	£0.01	£0.00	£0.06	£0.00	£0.00	£0.05	£0.02	£0.01	£0.00	£0.08
Others	2.93%	7.48%	73.29%	22.73%	29.30%	20.90%	19.73%	£0.05	£0.24	£0.68	£0.31	£0.45	£0.17	£1.89	£0.06	£0.28	£0.79	£0.36	£0.52	£0.19	£2.21

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Audio Visual Equipment																					
Bexhill - Town Centre	20.37%	22.58%	1.62%	13.98%	5.24%	12.70%	15.46%	£1.09	£2.16	£0.05	£0.58	£0.23	£0.27	£4.37	£1.31	£2.50	£0.05	£0.69	£0.27	£0.31	£5.14
Battle - Town Centre	0.75%	0.00%	0.00%	4.62%	0.00%	0.00%	0.69%	£0.04	£0.00	£0.00	£0.19	£0.00	£0.00	£0.23	£0.05	£0.00	£0.00	£0.23	£0.00	£0.00	£0.28
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	3.54%	0.00%	0.57%	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.18
Ravenside Retail Park, Bexhill	66.27%	46.38%	3.11%	17.42%	19.15%	38.23%	37.57%	£3.54	£4.43	£0.09	£0.72	£0.85	£0.81	£10.44	£4.27	£5.14	£0.10	£0.86	£0.99	£0.94	£12.30
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	1.51%	4.56%	0.00%	1.18%	0.00%	0.00%	2.06%	£0.08	£0.44	£0.00	£0.05	£0.00	£0.00	£0.57	£0.10	£0.51	£0.00	£0.06	£0.00	£0.00	£0.66
Little Common - Local Centre	1.51%	5.90%	0.00%	1.18%	0.00%	0.00%	2.41%	£0.08	£0.56	£0.00	£0.05	£0.00	£0.00	£0.69	£0.10	£0.65	£0.00	£0.06	£0.00	£0.00	£0.81
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	1.18%	0.85%	0.00%	0.34%	£0.00	£0.00	£0.00	£0.05	£0.04	£0.00	£0.09	£0.00	£0.00	£0.00	£0.06	£0.04	£0.00	£0.10
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	90.41%	79.42%	4.73%	39.57%	28.78%	50.93%	59.11%	£4.83	£7.58	£0.14	£1.64	£1.27	£1.08	£16.55	£5.82	£8.80	£0.16	£1.95	£1.49	£1.25	£19.48
Eastbourne - Town Centre	3.66%	7.12%	4.73%	4.62%	0.85%	0.00%	4.35%	£0.20	£0.68	£0.14	£0.19	£0.04	£0.00	£1.24	£0.24	£0.79	£0.16	£0.23	£0.04	£0.00	£1.46
Hastings - Town Centre	1.51%	6.23%	6.23%	24.41%	37.44%	27.27%	14.32%	£0.08	£0.59	£0.18	£1.01	£1.66	£0.58	£4.11	£0.10	£0.69	£0.21	£1.20	£1.94	£0.67	£4.81
Tunbridge Wells - Town Centre	0.00%	0.44%	23.41%	6.99%	0.00%	0.00%	3.21%	£0.00	£0.04	£0.68	£0.29	£0.00	£0.00	£1.01	£0.00	£0.05	£0.79	£0.34	£0.00	£0.00	£1.18
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	2.56%	0.00%	0.46%	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.13
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	6.95%	0.00%	1.15%	£0.00	£0.00	£0.00	£0.00	£0.31	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.36
Bluewater Shopping Centre	0.00%	0.00%	0.00%	1.18%	2.56%	0.00%	0.57%	£0.00	£0.00	£0.00	£0.05	£0.11	£0.00	£0.16	£0.00	£0.00	£0.00	£0.06	£0.13	£0.00	£0.19
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	1.62%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.05
Heathfield - Town Centre	0.00%	0.00%	18.68%	1.18%	0.85%	0.00%	2.06%	£0.00	£0.00	£0.54	£0.05	£0.04	£0.00	£0.63	£0.00	£0.00	£0.63	£0.06	£0.04	£0.00	£0.73
Langney Centre, Eastbourne	0.75%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
London	0.00%	0.00%	0.00%	0.00%	1.71%	3.61%	0.57%	£0.00	£0.00	£0.00	£0.00	£0.08	£0.08	£0.15	£0.00	£0.00	£0.00	£0.00	£0.09	£0.09	£0.18
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	2.37%	0.00%	0.00%	0.34%	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.12
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
St Leonards - Town Centre	2.16%	4.23%	0.00%	9.24%	6.10%	12.70%	5.04%	£0.12	£0.40	£0.00	£0.38	£0.27	£0.27	£1.44	£0.14	£0.47	£0.00	£0.46	£0.32	£0.31	£1.69
Tenterden - Town Centre	0.00%	0.00%	1.62%	0.00%	4.39%	0.00%	0.92%	£0.00	£0.00	£0.05	£0.00	£0.19	£0.00	£0.24	£0.00	£0.00	£0.05	£0.00	£0.23	£0.00	£0.28
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.11%	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
Other	1.51%	1.22%	1.62%	1.18%	2.56%	3.61%	1.72%	£0.08	£0.12	£0.05	£0.05	£0.11	£0.08	£0.48	£0.10	£0.14	£0.05	£0.06	£0.13	£0.09	£0.57
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	35.74%	9.24%	3.54%	1.86%	5.15%	£0.00	£0.00	£1.04	£0.38	£0.16	£0.04	£1.62	£0.00	£0.00	£1.20	£0.46	£0.18	£0.05	£1.89
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cranbrook	0.00%	0.00%	1.62%	0.00%	1.71%	0.00%	0.46%	£0.00	£0.00	£0.05	£0.00	£0.08	£0.00	£0.12	£0.00	£0.00	£0.05	£0.00	£0.09	£0.00	£0.14
Others	4.42%	6.79%	60.90%	24.41%	32.93%	21.79%	19.01%	£0.24	£0.65	£1.77	£1.01	£1.46	£0.46	£5.59	£0.28	£0.75	£2.05	£1.20	£1.71	£0.54	£6.53

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

Furniture, Furnishings & Carpets	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	27.84%	21.00%	0.00%	4.59%	0.89%	0.00%	12.26%	£0.88	£1.48	£0.00	£0.14	£0.03	£0.00	£2.54	£1.07	£1.72	£0.00	£0.17	£0.03	£0.00	£2.99
Battle - Town Centre	1.95%	0.85%	0.00%	11.37%	0.00%	1.66%	2.26%	£0.06	£0.06	£0.00	£0.36	£0.00	£0.03	£0.51	£0.07	£0.07	£0.00	£0.42	£0.00	£0.03	£0.60
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	8.04%	1.66%	1.51%	£0.00	£0.00	£0.00	£0.00	£0.26	£0.03	£0.29	£0.00	£0.00	£0.00	£0.00	£0.31	£0.03	£0.34
Ravenside Retail Park, Bexhill	8.67%	5.33%	0.00%	0.00%	1.79%	0.00%	3.44%	£0.28	£0.38	£0.00	£0.00	£0.06	£0.00	£0.71	£0.33	£0.44	£0.00	£0.00	£0.07	£0.00	£0.84
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	1.39%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.11
Little Common - Local Centre	0.00%	3.62%	0.00%	0.00%	0.00%	0.00%	1.18%	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.30	£0.00	£0.00	£0.00	£0.00	£0.30
Robertbridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northiam	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sedlescombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Rother District	38.46%	32.20%	0.00%	15.96%	10.71%	3.32%	21.08%	£1.22	£2.27	£0.00	£0.50	£0.35	£0.06	£4.39	£1.47	£2.63	£0.00	£0.60	£0.41	£0.06	£5.17
Eastbourne - Town Centre	33.59%	33.16%	2.70%	11.37%	5.36%	15.34%	20.54%	£1.07	£2.34	£0.06	£0.36	£0.17	£0.26	£4.26	£1.29	£2.71	£0.07	£0.42	£0.20	£0.30	£5.00
Hastings - Town Centre	11.48%	14.29%	8.00%	27.32%	33.04%	44.15%	20.75%	£0.36	£1.01	£0.19	£0.86	£1.07	£0.74	£4.24	£0.44	£1.17	£0.22	£1.02	£1.26	£0.86	£4.96
Tunbridge Wells - Town Centre	0.98%	2.24%	26.61%	7.98%	6.25%	1.66%	6.24%	£0.03	£0.16	£0.63	£0.25	£0.20	£0.03	£1.30	£0.04	£0.18	£0.73	£0.30	£0.24	£0.03	£1.51
Ashford - Designer Outlet Village	0.00%	0.00%	1.35%	1.09%	2.68%	3.42%	1.08%	£0.00	£0.00	£0.03	£0.03	£0.09	£0.06	£0.21	£0.00	£0.00	£0.04	£0.04	£0.10	£0.07	£0.25
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	10.71%	1.66%	1.94%	£0.00	£0.00	£0.00	£0.00	£0.35	£0.03	£0.38	£0.00	£0.00	£0.00	£0.00	£0.41	£0.03	£0.44
Bluewater Shopping Centre	0.00%	0.43%	2.70%	2.30%	2.68%	0.00%	1.18%	£0.00	£0.03	£0.06	£0.07	£0.09	£0.00	£0.25	£0.00	£0.03	£0.07	£0.09	£0.10	£0.00	£0.30
Brighton - Town Centre	1.95%	0.43%	0.00%	1.09%	0.89%	0.00%	0.75%	£0.06	£0.03	£0.00	£0.03	£0.03	£0.00	£0.16	£0.07	£0.03	£0.00	£0.04	£0.03	£0.00	£0.18
Hailsham - Town Centre	0.00%	0.85%	0.00%	0.00%	0.00%	0.00%	0.32%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07
Heathfield - Town Centre	0.00%	0.00%	11.95%	3.39%	0.00%	0.00%	1.83%	£0.00	£0.00	£0.28	£0.11	£0.00	£0.00	£0.39	£0.00	£0.00	£0.33	£0.13	£0.00	£0.00	£0.45
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.89%	0.00%	0.11%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03
London	1.95%	1.81%	3.95%	0.00%	3.57%	3.42%	2.26%	£0.06	£0.13	£0.09	£0.00	£0.12	£0.06	£0.46	£0.07	£0.15	£0.11	£0.00	£0.14	£0.07	£0.53
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.98%	0.85%	0.00%	0.00%	0.00%	1.66%	0.65%	£0.03	£0.06	£0.00	£0.00	£0.00	£0.03	£0.12	£0.04	£0.07	£0.00	£0.00	£0.00	£0.03	£0.14
St Leonards - Town Centre	0.98%	2.67%	1.35%	4.59%	2.68%	5.08%	2.69%	£0.03	£0.19	£0.03	£0.14	£0.09	£0.09	£0.57	£0.04	£0.22	£0.04	£0.17	£0.10	£0.10	£0.66
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.09%	2.68%	0.00%	0.65%	£0.00	£0.00	£0.00	£0.03	£0.09	£0.00	£0.12	£0.00	£0.00	£0.00	£0.04	£0.10	£0.00	£0.14
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	4.77%	5.33%	9.36%	6.89%	6.25%	6.84%	6.24%	£0.15	£0.38	£0.22	£0.22	£0.20	£0.12	£1.28	£0.18	£0.44	£0.26	£0.26	£0.24	£0.13	£1.50
Tunbridge Wells, Longfield Retail Park	2.93%	4.48%	30.67%	14.75%	8.93%	10.16%	9.78%	£0.09	£0.32	£0.72	£0.46	£0.29	£0.17	£2.06	£0.11	£0.37	£0.84	£0.55	£0.34	£0.20	£2.40
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lakeside Shopping Centre/Retail Park	0.98%	0.43%	1.35%	1.09%	1.79%	1.66%	1.08%	£0.03	£0.03	£0.03	£0.03	£0.06	£0.03	£0.21	£0.04	£0.03	£0.04	£0.04	£0.07	£0.03	£0.25
Shoreham	0.98%	0.85%	0.00%	0.00%	0.00%	0.00%	0.43%	£0.03	£0.06	£0.00	£0.00	£0.00	£0.00	£0.09	£0.04	£0.07	£0.00	£0.00	£0.00	£0.00	£0.11
Maidstone	0.00%	0.00%	0.00%	1.09%	0.89%	1.66%	0.43%	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03	£0.09	£0.00	£0.00	£0.00	£0.04	£0.03	£0.03	£0.11
Others	15.49%	18.12%	62.68%	37.38%	44.64%	35.54%	31.40%	£0.49	£1.28	£1.48	£1.17	£1.45	£0.60	£6.47	£0.59	£1.48	£1.71	£1.39	£1.70	£0.69	£7.57

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

13. Comparison Market Shares & Implied Turnovers 2011 & 2016 (con)

DIY, Decorating & Gardening	Market shares							Implied turnover 2011							Implied turnover 2016						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	24.67%	25.25%	1.32%	11.76%	2.00%	1.62%	14.83%	£0.79	£1.79	£0.04	£0.43	£0.08	£0.03	£3.15	£0.95	£2.07	£0.04	£0.51	£0.09	£0.04	£3.71
Battle - Town Centre	0.00%	0.40%	0.00%	6.48%	0.00%	0.00%	0.91%	£0.00	£0.03	£0.00	£0.23	£0.00	£0.00	£0.26	£0.00	£0.03	£0.00	£0.28	£0.00	£0.00	£0.31
Rye - Town Centre	0.00%	0.00%	0.00%	0.00%	16.30%	0.00%	3.13%	£0.00	£0.00	£0.00	£0.00	£0.65	£0.00	£0.65	£0.00	£0.00	£0.00	£0.00	£0.76	£0.00	£0.76
Ravenside Retail Park, Bexhill	69.44%	59.29%	6.48%	18.25%	8.20%	12.66%	37.44%	£2.22	£4.19	£0.18	£0.66	£0.33	£0.26	£7.85	£2.68	£4.87	£0.21	£0.79	£0.38	£0.30	£9.23
Tesco, Ravenside Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sidley - Local Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Little Common - Local Centre	0.00%	2.32%	0.00%	0.00%	0.00%	0.00%	0.81%	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.19
Robertsbridge	0.00%	0.00%	0.00%	4.29%	0.00%	0.00%	0.50%	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£0.16	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.18
Peasmarsh	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ticehurst	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Northium	0.00%	0.00%	0.00%	0.00%	4.80%	0.00%	0.91%	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.22
Sedlescombe	0.00%	0.00%	0.00%	2.19%	0.00%	1.62%	0.40%	£0.00	£0.00	£0.00	£0.08	£0.00	£0.03	£0.11	£0.00	£0.00	£0.00	£0.09	£0.00	£0.04	£0.13
Rother District	94.11%	87.27%	7.80%	42.97%	31.30%	15.91%	58.93%	£3.01	£6.17	£0.22	£1.56	£1.25	£0.33	£12.54	£3.64	£7.16	£0.25	£1.85	£1.46	£0.38	£14.74
Eastbourne - Town Centre	4.47%	3.84%	1.32%	2.19%	0.00%	0.00%	2.42%	£0.14	£0.27	£0.04	£0.08	£0.00	£0.00	£0.53	£0.17	£0.31	£0.04	£0.09	£0.00	£0.00	£0.62
Hastings - Town Centre	0.71%	4.24%	6.48%	36.49%	36.10%	55.42%	17.96%	£0.02	£0.30	£0.18	£1.32	£1.44	£1.15	£4.41	£0.03	£0.35	£0.21	£1.57	£1.69	£1.33	£5.17
Tunbridge Wells - Town Centre	0.00%	0.00%	19.45%	1.10%	0.00%	0.00%	2.02%	£0.00	£0.00	£0.54	£0.04	£0.00	£0.00	£0.58	£0.00	£0.00	£0.63	£0.05	£0.00	£0.00	£0.67
Ashford - Designer Outlet Village	0.00%	0.00%	0.00%	0.00%	4.10%	0.00%	0.81%	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.19
Ashford - Town Centre	0.00%	0.00%	0.00%	0.00%	12.90%	0.00%	2.42%	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£0.60	£0.00	£0.60
Bluewater Shopping Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Brighton - Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hailsham - Town Centre	0.00%	0.00%	1.32%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Heathfield - Town Centre	0.00%	0.00%	12.97%	0.00%	0.00%	1.62%	1.41%	£0.00	£0.00	£0.36	£0.00	£0.00	£0.03	£0.39	£0.00	£0.00	£0.42	£0.00	£0.00	£0.04	£0.46
Langney Centre, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
London	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	0.10%	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.03
Morrisons, Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, John McAdam Way, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Linden Park Rd, Tun Wells	0.00%	0.00%	1.32%	0.00%	0.00%	0.00%	0.10%	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.04
Sainsburys, Simon Well, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sovereign (Crumbles) Retail Park, Eastbourne	0.00%	0.81%	0.00%	0.00%	0.00%	0.00%	0.30%	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.07
St Leonards - Town Centre	0.00%	0.00%	0.00%	3.19%	2.00%	0.00%	0.81%	£0.00	£0.00	£0.00	£0.12	£0.08	£0.00	£0.20	£0.00	£0.00	£0.00	£0.14	£0.09	£0.00	£0.23
Tenterden - Town Centre	0.00%	0.00%	0.00%	1.10%	2.00%	0.00%	0.50%	£0.00	£0.00	£0.00	£0.04	£0.08	£0.00	£0.12	£0.00	£0.00	£0.00	£0.05	£0.09	£0.00	£0.14
Tesco, Ashford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Churchwood Drive, St Leonards	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Lottbridge Drove, Ebne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Tunbridge Wells	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other	0.00%	1.52%	14.29%	5.38%	4.10%	4.76%	3.73%	£0.00	£0.11	£0.40	£0.20	£0.16	£0.10	£0.96	£0.00	£0.12	£0.46	£0.23	£0.19	£0.11	£1.12
Tunbridge Wells, Longfield Retail Park	0.00%	0.00%	35.06%	6.48%	1.40%	1.62%	4.64%	£0.00	£0.00	£0.97	£0.23	£0.06	£0.03	£1.30	£0.00	£0.00	£1.13	£0.28	£0.07	£0.04	£1.51
Tonbridge Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ore	0.00%	0.40%	0.00%	1.10%	2.70%	19.05%	2.32%	£0.00	£0.03	£0.00	£0.04	£0.11	£0.39	£0.57	£0.00	£0.03	£0.00	£0.05	£0.13	£0.46	£0.66
Wyevale Garden Centre, Hastings	0.71%	1.92%	0.00%	0.00%	2.70%	1.62%	1.41%	£0.02	£0.14	£0.00	£0.00	£0.11	£0.03	£0.30	£0.03	£0.16	£0.00	£0.00	£0.13	£0.04	£0.35
Others	0.71%	4.65%	64.94%	17.25%	32.60%	28.67%	18.67%	£0.02	£0.33	£1.80	£0.63	£1.30	£0.59	£4.67	£0.03	£0.38	£2.09	£0.74	£1.52	£0.69	£5.45

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

14. Comparison Market Share & Implied Turnover Summary

Comparison Summary	Implied turnover 2011							Implied turnover 2016							Market shares (pre-M&S impact)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total
Bexhill - Town Centre	£13.58	£21.87	£0.15	£2.11	£0.46	£0.51	£38.67	£16.39	£25.37	£0.18	£2.50	£0.54	£0.59	£45.57	35.7%	27.8%	0.5%	5.6%	1.2%	2.6%	16.1%
Battle - Town Centre	£0.28	£1.36	£0.12	£5.01	£0.00	£0.29	£7.06	£0.33	£1.58	£0.14	£5.96	£0.00	£0.33	£8.35	0.7%	1.7%	0.4%	13.4%	0.0%	1.5%	2.9%
Rye - Town Centre	£0.01	£0.00	£0.00	£0.18	£7.63	£0.21	£8.04	£0.02	£0.00	£0.00	£0.22	£8.93	£0.25	£9.41	0.0%	0.0%	0.0%	0.5%	20.0%	1.1%	3.4%
Ravenside Retail Park, Bexhill	£8.71	£13.01	£0.35	£1.77	£1.53	£1.40	£26.78	£10.52	£15.10	£0.41	£2.10	£1.80	£1.62	£31.53	22.9%	16.6%	1.3%	4.7%	4.0%	7.2%	11.2%
Tesco, Ravenside Retail Park	£0.85	£1.47	£0.05	£0.08	£0.00	£0.00	£2.46	£1.03	£1.71	£0.06	£0.09	£0.00	£0.00	£2.89	2.2%	1.9%	0.2%	0.2%	0.0%	0.0%	1.0%
Sidley - Local Centre	£0.20	£1.68	£0.00	£0.05	£0.00	£0.00	£1.93	£0.24	£1.95	£0.00	£0.06	£0.00	£0.00	£2.24	0.5%	2.1%	0.0%	0.1%	0.0%	0.0%	0.8%
Little Common - Local Centre	£0.08	£2.84	£0.00	£0.05	£0.00	£0.01	£2.99	£0.10	£3.30	£0.00	£0.06	£0.00	£0.01	£3.47	0.2%	3.6%	0.0%	0.1%	0.0%	0.1%	1.2%
Robertsbridge	£0.00	£0.06	£0.10	£1.28	£0.00	£0.00	£1.44	£0.00	£0.07	£0.11	£1.52	£0.00	£0.00	£1.70	0.0%	0.1%	0.3%	3.4%	0.0%	0.0%	0.6%
Peasmarsh	£0.00	£0.00	£0.05	£0.05	£0.29	£0.00	£0.39	£0.00	£0.00	£0.06	£0.34	£0.00	£0.00	£0.46	0.0%	0.0%	0.2%	0.1%	0.8%	0.0%	0.2%
Ticehurst	£0.00	£0.00	£0.95	£0.00	£0.02	£0.00	£0.97	£0.00	£0.00	£1.10	£0.00	£0.02	£0.00	£1.12	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.4%
Northium	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.42	£0.00	£0.42	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%
Sedlescombe	£0.00	£0.00	£0.00	£0.08	£0.00	£0.03	£0.11	£0.00	£0.00	£0.00	£0.09	£0.00	£0.04	£0.13	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%
Rother District	£23.71	£42.29	£1.78	£10.65	£10.30	£2.46	£91.20	£28.61	£49.07	£2.06	£12.65	£12.05	£2.85	£107.30	62.3%	53.8%	6.3%	28.5%	27.0%	12.6%	38.0%
Eastbourne - Town Centre	£9.22	£21.46	£0.98	£3.87	£0.84	£1.26	£37.64	£11.12	£24.90	£1.13	£4.60	£0.99	£1.46	£44.21	24.2%	27.3%	3.5%	10.4%	2.2%	6.4%	15.7%
Hastings - Town Centre	£3.34	£8.24	£2.34	£11.27	£14.54	£10.69	£50.41	£4.03	£9.56	£2.71	£13.39	£17.01	£12.37	£59.06	8.8%	10.5%	8.3%	30.1%	38.1%	54.6%	21.0%
Tunbridge Wells - Town Centre	£0.06	£0.71	£13.04	£4.74	£1.46	£0.47	£20.47	£0.07	£0.83	£15.10	£5.63	£1.70	£0.54	£23.88	0.2%	0.9%	46.5%	12.7%	3.8%	2.4%	8.5%
Total comparison spend	£38.08	£78.58	£28.07	£37.43	£38.16	£19.56	£239.89	£45.96	£91.18	£32.51	£44.48	£44.64	£22.65	£281.42							

Comparison Summary	Implied turnover 2016 (with M&S)							Revised market shares (with M&S)							Attraction from Outside Study Area (Hastings/Tourist/Visitor Spend)						
	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	Bexhill East	Bexhill West	North West Rother	Battle	Rye	Westfield, Guestling, Fairlight	Study Area Total	% Inflow	2011 Inflow £M	2011 Total Turnover	2016 Total Turnover	2018 Total Turnover	2023 Total Turnover	2028 Total Turnover
Bexhill - Town Centre	£16.10	£25.09	£0.18	£2.50	£0.54	£0.59	£45.00	35.0%	27.5%	0.5%	5.6%	1.2%	2.6%	16.0%	15%	£5.80	£44.48	£51.76	£55.64	£66.83	£80.24
Battle - Town Centre	£0.33	£1.58	£0.14	£5.96	£0.00	£0.33	£8.35	0.7%	1.7%	0.4%	13.4%	0.0%	1.5%	3.0%	40%	£2.82	£9.89	£11.68	£12.56	£15.09	£18.12
Rye - Town Centre	£0.02	£0.00	£0.00	£0.22	£8.87	£0.25	£9.35	0.0%	0.0%	0.0%	0.5%	19.9%	1.1%	3.3%	40%	£3.22	£11.26	£13.09	£14.08	£16.91	£20.30
Ravenside Retail Park, Bexhill	£12.20	£16.78	£0.52	£2.38	£1.96	£1.57	£35.41	26.6%	18.4%	1.6%	5.3%	4.4%	6.9%	12.6%	40%	£11.69	£40.92	£53.63	£57.65	£69.25	£83.14
Tesco, Ravenside Retail Park	£1.03	£1.71	£0.06	£0.09	£0.00	£0.00	£2.89	2.2%	1.9%	0.2%	0.2%	0.0%	0.0%	1.0%							
Sidley - Local Centre	£0.24	£1.95	£0.00	£0.06	£0.00	£0.00	£2.24	0.5%	2.1%	0.0%	0.1%	0.0%	0.0%	0.8%							
Little Common - Local Centre	£0.10	£3.30	£0.00	£0.06	£0.00	£0.01	£3.47	0.2%	3.6%	0.0%	0.1%	0.0%	0.1%	1.2%							
Robertsbridge	£0.00	£0.07	£0.11	£1.52	£0.00	£0.00	£1.70	0.0%	0.1%	0.3%	3.4%	0.0%	0.0%	0.6%							
Peasmarsh	£0.00	£0.00	£0.06	£0.06	£0.34	£0.00	£0.46	0.0%	0.0%	0.2%	0.1%	0.8%	0.0%	0.2%							
Ticehurst	£0.00	£0.00	£1.10	£0.00	£0.02	£0.00	£1.12	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.4%							
Northium	£0.00	£0.00	£0.00	£0.00	£0.42	£0.00	£0.42	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%							
Sedlescombe	£0.00	£0.00	£0.00	£0.09	£0.00	£0.04	£0.13	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%							
Rother District	£30.02	£50.48	£2.18	£12.94	£12.16	£2.79	£110.56	65.3%	55.4%	6.7%	29.1%	27.2%	12.3%	39.3%							
Eastbourne - Town Centre	£10.00	£23.78	£1.13	£4.55	£0.99	£1.46	£41.91	21.8%	26.1%	3.5%	10.2%	2.2%	6.4%	14.9%							
Hastings - Town Centre	£3.74	£9.27	£2.65	£13.22	£16.90	£11.92	£57.71	8.1%	10.2%	8.2%	29.7%	37.9%	52.7%	20.5%							
Tunbridge Wells - Town Centre	£0.07	£0.83	£15.10	£5.57	£1.70	£0.54	£23.82	0.2%	0.9%	46.5%	12.5%	3.8%	2.4%	8.5%							
Total comparison spend	£45.96	£91.18	£32.51	£44.48	£44.64	£22.65	£281.42	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%							

Notes
M&S diversions derived from CGMS impact assessment and GLH critique

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

15. Comparison goods benchmark turnovers 2012

Centre/Location	Sales Area	Benchmark Trading Density	Benchmark Turnover
	Sqm	£/Sqm	£M
Bexhill - Town Centre	15,200	£3,724	£56.61
Battle - Town Centre	3,330	£2,926	£9.74
Rye - Town Centre	6,820	£2,926	£19.96
Ravenside Retail Park, Bexhill	14,878	£3,724	£55.41

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

16. Comparison Capacity

Centre/Location	Benchmark Turnover	Market Share	Surplus	Benchmark Trading Density	Sales Floorspace	Gross Floorspace
	£M	£M	£M	£/sqm	Sqm	Sqm
2013						
Bexhill - Town Centre	£57.32	£47.02	-£10.30	£3,771	-2,732	-3,688
Ravenside Retail Park, Bexhill	£46.55	£43.26	-£3.29	£3,771	-873	-1,047
Bexhill total			-£13.59		-3605	-4735
Town centre capacity (50% diverted)			-£11.95		-3168	
2018						
Bexhill - Town Centre	£60.99	£55.64	-£5.35	£4,012	-1,334	-1,801
Ravenside Retail Park, Bexhill	£59.70	£57.65	-£2.05	£4,012	-511	-614
Bexhill total			-£7.41		-1846	-2415
Town centre capacity (50% diverted)			-£6.38		-1590	
2023						
Bexhill - Town Centre	£64.90	£66.83	£1.94	£4,270	454	612
Ravenside Retail Park, Bexhill	£63.52	£69.25	£5.73	£4,270	1,341	1,609
Bexhill total			£7.66		1,795	2,222
Town centre capacity (50% diverted)			£4.80		1,124	
2028						
Bexhill - Town Centre	£69.06	£80.24	£11.19	£4,543	2,462	3,324
Ravenside Retail Park, Bexhill	£67.59	£83.14	£15.55	£4,543	3,423	4,107
Bexhill total			£26.74		5,885	7,431
Town centre capacity (50% diverted)			£18.96		4,174	

Notes
2.5% pa sales efficiency allowance
M&S assumed to be complete by end 2013

APPENDIX C: QUANTITATIVE RETAIL CAPACITY (SCENARIO A)

Scenario A: Quantitative and Qualitative Capacity Summary Tables

1. Convenience capacity summary

Year	Capacity £M	Sqm net
2013	£9.20	739
2018	£8.88	706
2023	£11.02	868
2028	£13.52	1,054

2. Comparison capacity summary: Bexhill

Year	Capacity £M	Sqm net
2013	-£13.59	- 3,605
2018	-£7.41	- 1,846
2023	£7.66	1,795
2028	£26.74	5,885

3. Comparison capacity summary: Bexhill town centre

Year	Capacity £M	Sqm net
2013	-£11.95	-3168
2018	-£6.38	-1590
2023	£4.80	1,124
2028	£18.96	4,174

4. Service trade capacity summary (sqm)

	2013	2018	2023	2028
Convenience				
Net	739	706	868	1,054
Gross (@ 70%)	1,055	1,008	1,239	1,506
Comparison				
Net	-3168	-1590	1,124	4,174
Gross (@ 75%)	-4224	-2120	1,499	5,565
Total Retail				
Net	- 2,429	- 884	1,992	5,228
Gross	- 3,169	- 1,112	2,738	7,071
Service trade				
Gross	- 887	- 311	767	1,980

6. Increased convenience expenditure retention

	2013	2018	2023	2028
Bexhill home zones market share	80%	82%	82%	82%
Option 1: 90% retention				
Increase in home zone market share	10%	8%	8%	8%
Additional capacity £M	£9.26	£8.08	£8.54	£9.07
Sqm	743	643	672	707
Overall capacity assuming uplift in market share (Table 1)	1,482	1,349	1,540	1,761
Option 2: 95% retention				
Increase in home zone market share	15%	13%	13%	13%
Additional capacity £M	£13.80	£12.87	£13.65	£14.56
Sqm	1,108	1,023	1,074	1,135
Overall capacity assuming uplift in market share (Table 1)	1,847	1,762	1,942	2,189

Notes

Table numbering follows summary tables of main report for Baseline population scenario. Table 5 is omitted intentionally

APPENDIX D: Sequential Site Assessment

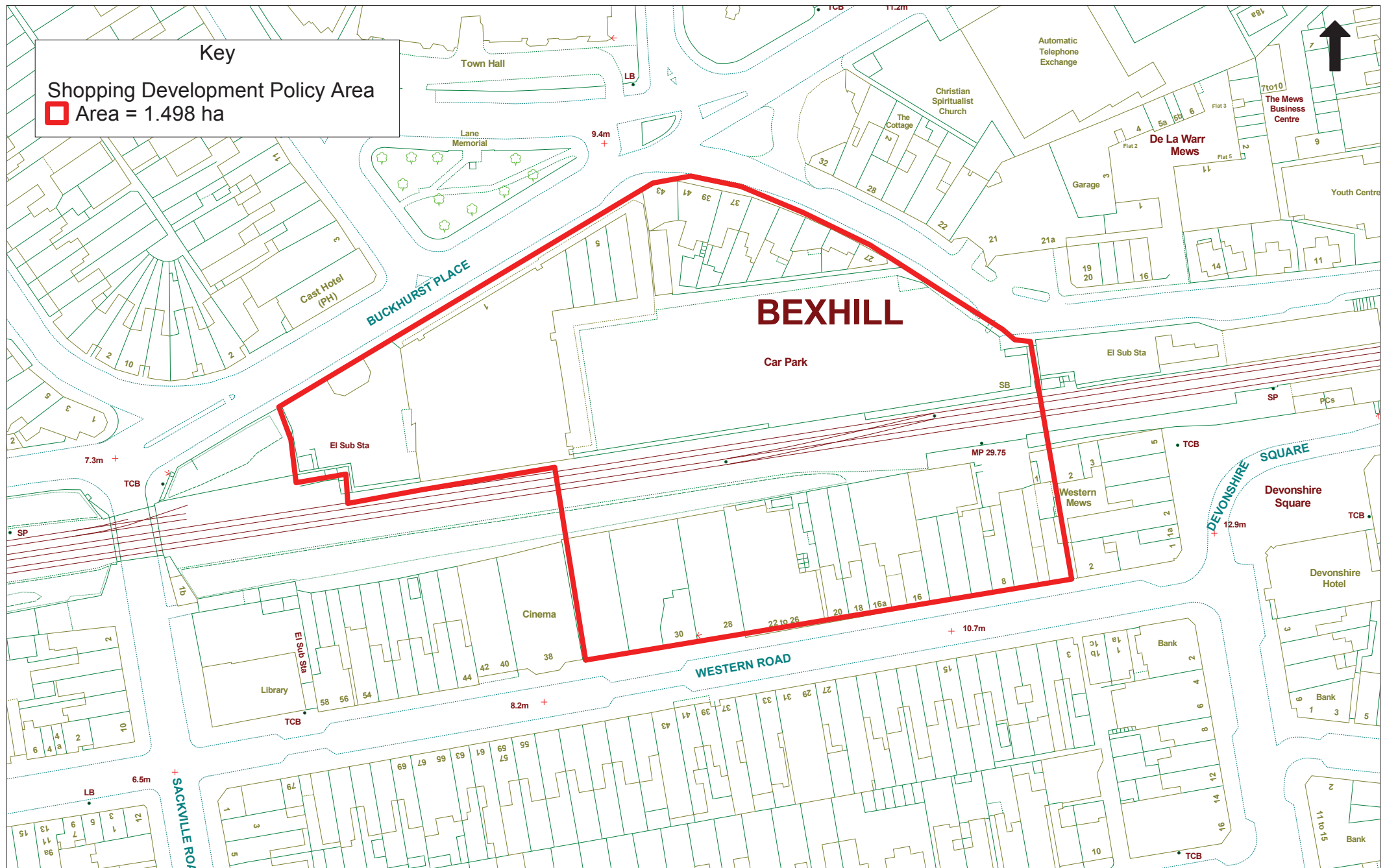
Site 1
BUCKHURST PLACE ALLOCATION


Size	1.498ha
Location	In-centre
Description	<p>Existing uses: Sainsbury's supermarket and surface car parking, small-scale mainly A Class units, upper-storey dwellings and railway line.</p> <p>Planning history: foodstore and car park originally developed in the 1970s and later extended into some adjacent retail kiosks. Other development on the site largely piecemeal: replacement of war damaged buildings and changes of use within primarily A-classes in the smaller units facing onto Station Road and Western Road. No evidence of any applications to secure comprehensive redevelopment.</p> <p>Existing structures: 1970s foodstore and adjoining small units and surface car parking. Southern part of the site (Western Road), includes higher quality buildings and is located within a Conservation Area.</p> <p>Allocations/designations: allocated as part of the Bexhill Town Centre Shopping Area. Western Road included within the town centre Conservation Area.</p> <p>Ownership: British Land majority landowner (Sainsbury's store and car park), Network Rail, together with a number of piecemeal landownerships for the c.25 other units and upper-storey accommodation.</p>
Availability	The Sainsbury's store is currently trading and it is understood that there have been no indications from the owners that they are intending to redevelop the store or car park elements in the short- to medium-term.
Suitability	<p>The site is within the town centre but at present is relatively separate from the rest of the town by virtue of the railway line. Redevelopment to improve this connection is considered extremely beneficial in order to maximise linked trip spending.</p> <p>The existing foodstore can be seen to be main convenience shopping destination in Bexhill and exhibits signs of overtrading which are exacerbated by its dated nature and poor configuration. There is considered to be merit in seeking to enhance the foodstore to resolve these deficiencies.</p>
Viability	There is planning logic in including land to the south of the railway line in terms of improving connectivity with the rest of the town centre; however, the cost of delivering development over the railway line is likely to be significant. That said, there is scope to introduce an improved crossing over the railway line that provided a better linkage with a reconfigured/reoriented foodstore-led development.
Conclusions	Given the scale of additional development the site might be able to deliver, the costs of developing across the railway line are considered to be preclusive such that any requirement to do so could undermine the viability of a scheme. The Council should instead seek improved pedestrian crossings over the railway line which would afford seamless linkages to a foodstore development to the north. However, whilst the site is considered suitable, there is limited prospect of a scheme coming forward in the short- to medium-term given the lack of engagement by the landowners.

Key

Shopping Development Policy Area

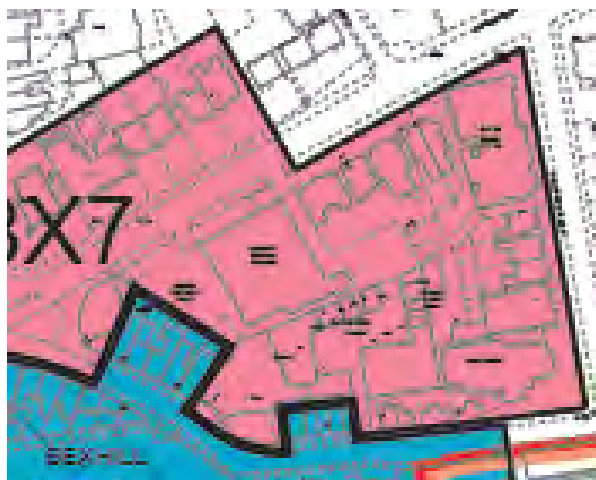
Area = 1.498 ha



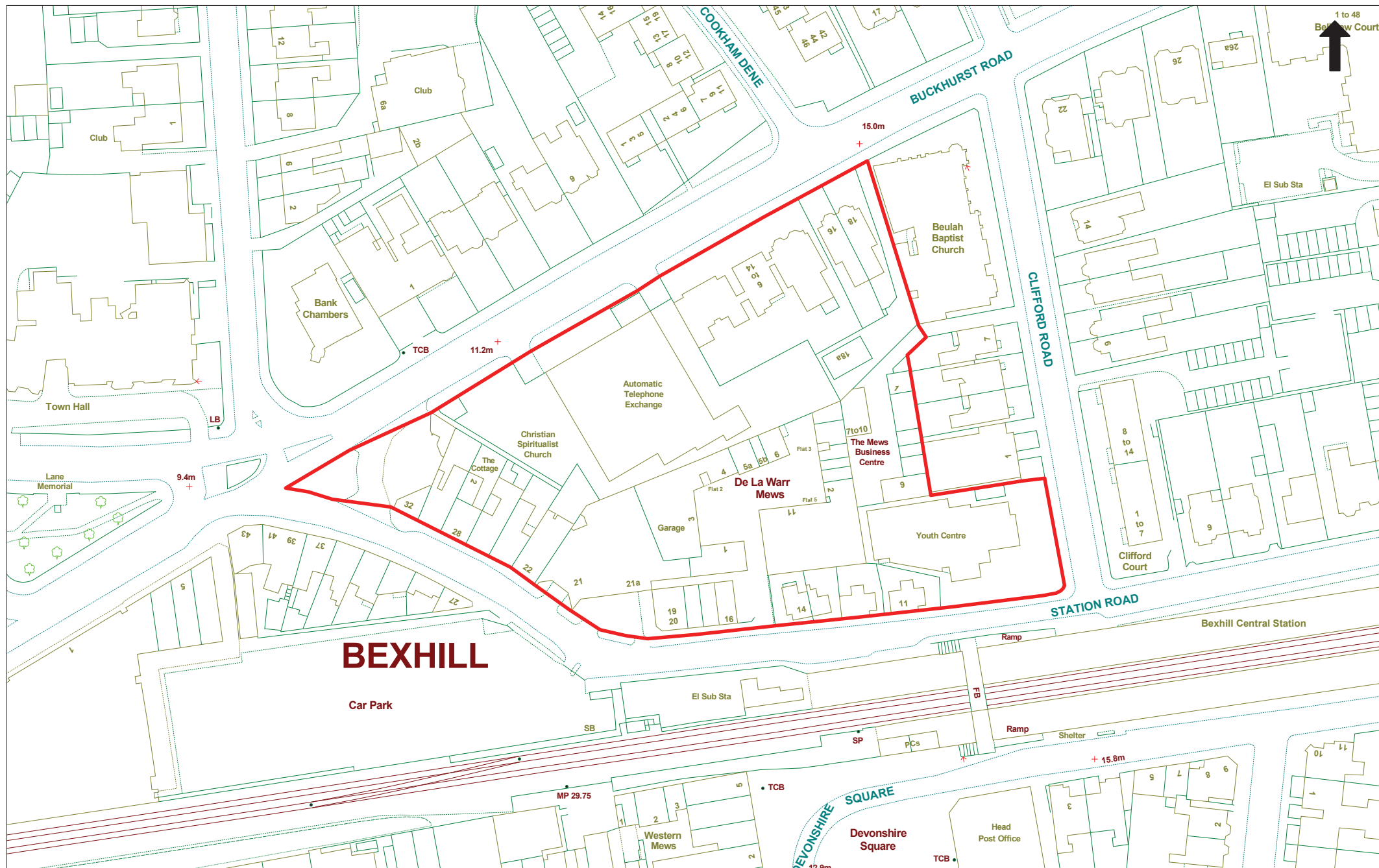
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Scale: 1:1250

TQ7407SW

Site 2
LAND ADJACENT TO STATION ROAD


Size	1.197 ha
Location	In/edge of centre The majority of the site adjoins the BTCSA but a small portion at the western end are designated as part of the BTCSA
Description	<p>Existing uses: range of uses across the site including youth centre, garage, small-scale industrial/business units (De La Warr Mews/The Mews Business Centre), telephone exchange, place of worship, small-scale retail and service uses and residential</p> <p>Planning history: extensive but relating primarily to small-scale works. No evidence of any applications for comprehensive redevelopment.</p> <p>Existing structures: primarily small-scale, low quality structures with no cohesive development. No evidence of buildings of historic merit or significance.</p> <p>Allocations/designations: allocated as part of the Bexhill Office Area and as set out previously partially within the BTCSA.</p> <p>Ownership: multiple and numerous</p>
Availability	Numerous ownerships across the site are likely to make assembly complex. The site is unlikely to become available in the short to medium term.
Suitability	The site is irregularly shaped and relatively limited in size which render it unsuitable for any significant retail development. It is considered that only in combination with the adjacent Sainsbury's site could a more meaningful development site be achieved. However, it is constrained by busy roads to the north and south; the southern road, Station Road, would require a comprehensive transport solution there was any prospect of combining the two development sites. This would necessarily have implications on the timescales for availability.
Viability	Relocation of telephone exchanges are notoriously costly. Furthermore, it is noted that there are a number of existing businesses on the site which may require relocation, particularly compulsory purchase powers were needed to assemble the site; again, these costs would need to be factored into any development.
Conclusions	Given the shortcomings in terms of suitability, it is considered unlikely that a viable development could be brought forward on the site within a reasonable time period.



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Area = 1.197 ha
 Scale: 1:1250
 TQ7407NW

Site 3
BEECHING ROAD INDUSTRIAL ESTATE (AREAS A(i), A(ii) & A(iii))

Size

3.17 ha

Location

Area A(i): edge of centre (c. 160m from edge of nearest designated shopping area)
 Area A (ii): edge of centre (c. 230m) if footpath along eastern boundary is retained/enhanced. If footpath is lost and access from Beeching Road, out of centre (c. 410m). Limited visual connection with the town centre.
 Area A(iii): out of centre (c.350m and lacking any visual connection with the town centre).

Description
Area A(i)

Existing uses: Beeching Park Industrial Estate (BPIE) comprising 21 units and associated car parking in primarily B1/B2/B8 uses, with one A1 unit and four vacant units. Planning history: no evidence of any applications to redevelop the existing BPIE. Recent applications relating primarily to changes of use to allow different employment activities. One unit in A1 use (Unit 2) but no evidence of formal application in planning history.

Existing structures: c. two-storey warehouses configured in one staggered terrace backing onto Terminus Road, a smaller terrace to the north west and a standalone building to the north east, accessed via Wainwright Road.

Allocations/designations: none

Ownership: Rother District Council with a number of leasehold interests.

Area A(ii)

Existing uses: builders' merchants, scout hut, veterinary surgery, surface car and coach parking

Planning history: no evidence of any applications to comprehensively develop the site. Originally all in employment use (builders' merchants approved 1972) but more recent applications have been approved to regularise the scout hut (replaced in 2007 following a fire) and service uses. Independent surface car parking use longstanding.

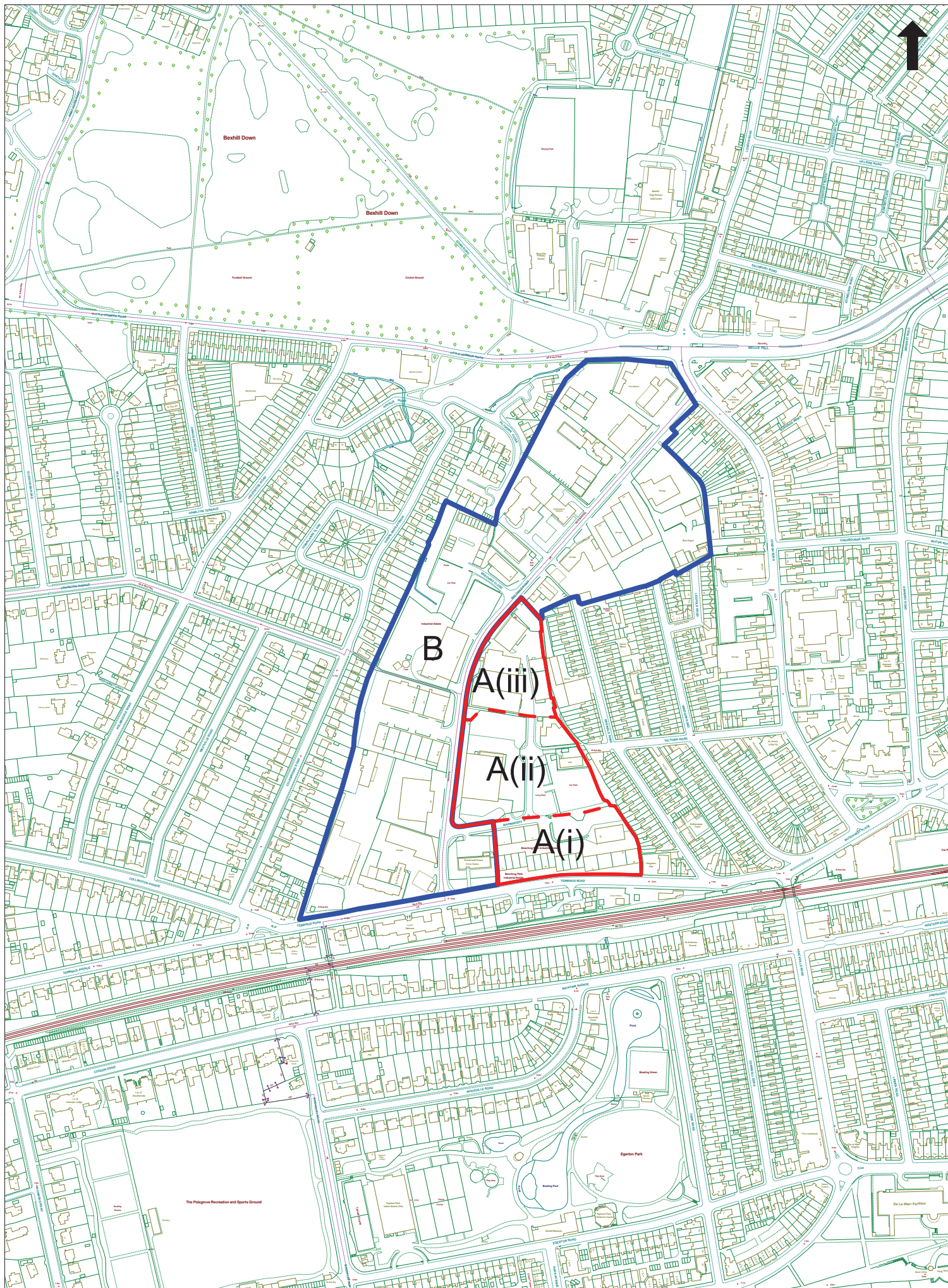
Existing structures: significant levels differences across the site, falling from Beeching Road in the west towards the eastern boundary. Large warehouse with entrances at the Beeching Road and lower levels, small-scale structures comprising

Site 3	BEECHING ROAD INDUSTRIAL ESTATE (AREAS A(i), A(ii) & A(iii))
	<p>the scout hut and surgery. The rest of the site largely open and hard surfaced.</p> <p>Allocations/designations: none</p> <p>Ownership: Rother District Council freehold owners, with a number a leasehold interests</p> <p>Area A(iii)</p> <p>Existing uses: established industrial/employment uses, known as Bexhill West Trading Estate</p> <p>Planning history: dominated by B Class development. No significant applications recorded to change this long-established employment use.</p> <p>Existing structures: four separate warehouse buildings, two/three storeys in height but with limited presence on Beeching Road due to lower ground levels and established conifer screening. Accesses from Wainwright Road and Beeching Road.</p> <p>Allocations/designations: none</p> <p>Ownership: freehold ownership Rother District Council, leased to Allnat (London) on a long lease due to expire in 2072. Subleases likely to be in place.</p>
Availability	<p>There appear to be existing businesses across the entire site, particularly in Area A(i) which suggest that the site may be difficult to assemble in the short term. Having regard to the adopted planning policies, whilst the site has no explicit designation, it is in existing employment use. However, all employment sites are subject to overarching employment policies which resist loss and as such any loss would have to be justified. Given it is almost entirely occupied and appears to be average quality/affordable space, a strong case would need to be advanced as part of any planning application.</p> <p>Area A(ii) has a more limited number of existing businesses which would be easier to acquire/relocate on/off site in the short term. It is considered that the site could become available within five years; however, as with Area A(i) any loss of floorspace would have to be robustly justified.</p> <p>Area A(iii) does not appear to be fully occupied. Although there is a long-lease interest on the site, it relates to a single interest; there may be scope for the site to become available for development in the short term. The same principles of needing justify employment loss as set out in relation to Area A(i) apply.</p>
Suitability	<p>Area A(i) has the ability to form good linkages with the designed town centre, with Terminus Road representing a logical location for a store entrance and active frontage. Furthermore, it is of size that is appropriate to the identified need, particularly if development came forward in the latter part of the plan period.</p> <p>Area A(ii) is physically separated from Terminus Road as the main route into the town centre by Area A(i). There is a footpath that runs along the eastern boundary which provides a linkage; however, path is narrow, unmade and uninviting and would need further improvements rather than just retention, including clear visual links between Terminus Road for it to be considered edge of centre.</p> <p>Any development on the site which did not encompass Area A(i) would need to be oriented to promote this linkage and should entail improvements to the linkage. If the footpath link were lost, this would render the site out of centre in retail terms and would be significantly less likely to result in linked trip spending in the town centre.</p> <p>Area A(iii) has no connection with the town centre; whilst there are various routes that can be taken to access it, these are not via contiguous shopping frontages or town centre uses and as such, it is separated from the centre. Forming any meaningful linkages would therefore be challenging.</p>
Viability	Due to the presence of active businesses on Area A (i), achieving a viable scheme

Site 3	BEECHING ROAD INDUSTRIAL ESTATE (AREAS A(i), A(ii) & A(iii))
	<p>on the site may be challenging, particularly given its relatively limited size. It is likely that Area A(ii) would have to be incorporated in order to assemble a viable development site, with the associated car parking requirements.</p> <p>It is considered that Area A(iii) represents a viable development prospect, subject to the costs of business relocation not precluding development.</p>
Conclusions	<p>Area A(i) is considered suitable and available for development in the medium- to long-term. The viability case for the site is more complex and it is questionable whether a smaller retail development of the scale of the identified capacity could generate the necessary returns.</p> <p>Area A(ii) is considered less suitable than Area A(i) due to its limited connection with the town centre but could potentially be made available within a shorter timescale. However, having regard to the identified need, it has not been clearly demonstrated that there is any urgency which would necessitate development in the short term. In this regard, Area A(i) remains the preferred site.</p> <p>Area A(iii) is the least suitable in sequential terms: it is separated from the town centre and has limited prospects of overcoming this. It is partially occupied but it is considered that the site could be made available within a relatively short timescale; however, as part of justifying a loss of employment space, it is likely that these existing businesses would need to be relocated which would place additional financial burden on development. Indeed, this issue of relocation would have to be considered in relation to Areas A(i) and (ii).</p> <p>Whilst the sites have been considered separately above, it is possible that Area A could be considered as a single development opportunity. Having regard to the above analysis which confirms the existence of long-term leases and existing businesses on site, it is considered that the site as a whole would be unlikely to come forward for development in the short term. In terms of suitability, regard should be given to the identified need which is relatively limited over the plan period, rendering the site as a whole not suitable for development. It should also be noted that the assembly of a significant proportion of the frontage on to Terminus Road and the quality of linkages to the town centre is likely to play a determining factor in terms of whether the site could be considered edge of centre in retail planning terms.</p>

Site 4
BEECHING INDUSTRIAL ESTATE AREA B


Size	9.2 ha
Location	Edge/out of centre – distance from the BTCSA increases across the site. Police station c.200m but furthest section c.700m.
Description	<p>Existing uses: mixed industrial and employment (B1/2/8), trade counters, public services (police, ambulance, fire stations), vacant petrol filling station, public house.</p> <p>Planning history: small-scale/ancillary A1 uses permitted in several properties but the overriding use is employment. No applications received for major retail development on the site.</p> <p>Existing structures: dispersed, low-rise buildings with limited associated surface level car parking</p> <p>Allocations/designations: none</p> <p>Ownership: Rother District Council freehold with 17 leasehold interests.</p>
Availability	There are a number of vacant units across the site; however, the majority are in active use. It is likely that these uses would have to be relocated and any loss of employment land justified in policy terms.
Suitability	The site is substantial and is much larger than the identified need. Additionally, only the land at the southern part of the site is considered capable of forming meaningful linkages with the town centre. However, the ability to form a suitable site for development, having regard to the position of Beeching Road, is considered challenging.
Viability	Provided any existing leases could be extinguished at a reasonable cost, the site is considered to be viable for development.
Conclusions	The site is extensive and much of it is remote from the town centre rendering it largely unsuitable for retail development. Only the very southern part of the site (closest to the junction of Terminus Road and Beeching Road) could be considered to be edge of centre. Land parcels in the southern part of the site could be assembled to form a suitable development opportunity. The southern part of the site could be made available during the course of the plan period, particularly if vacant premises in other parts of the site were used to viably relocate existing.



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Scale: 1:5000

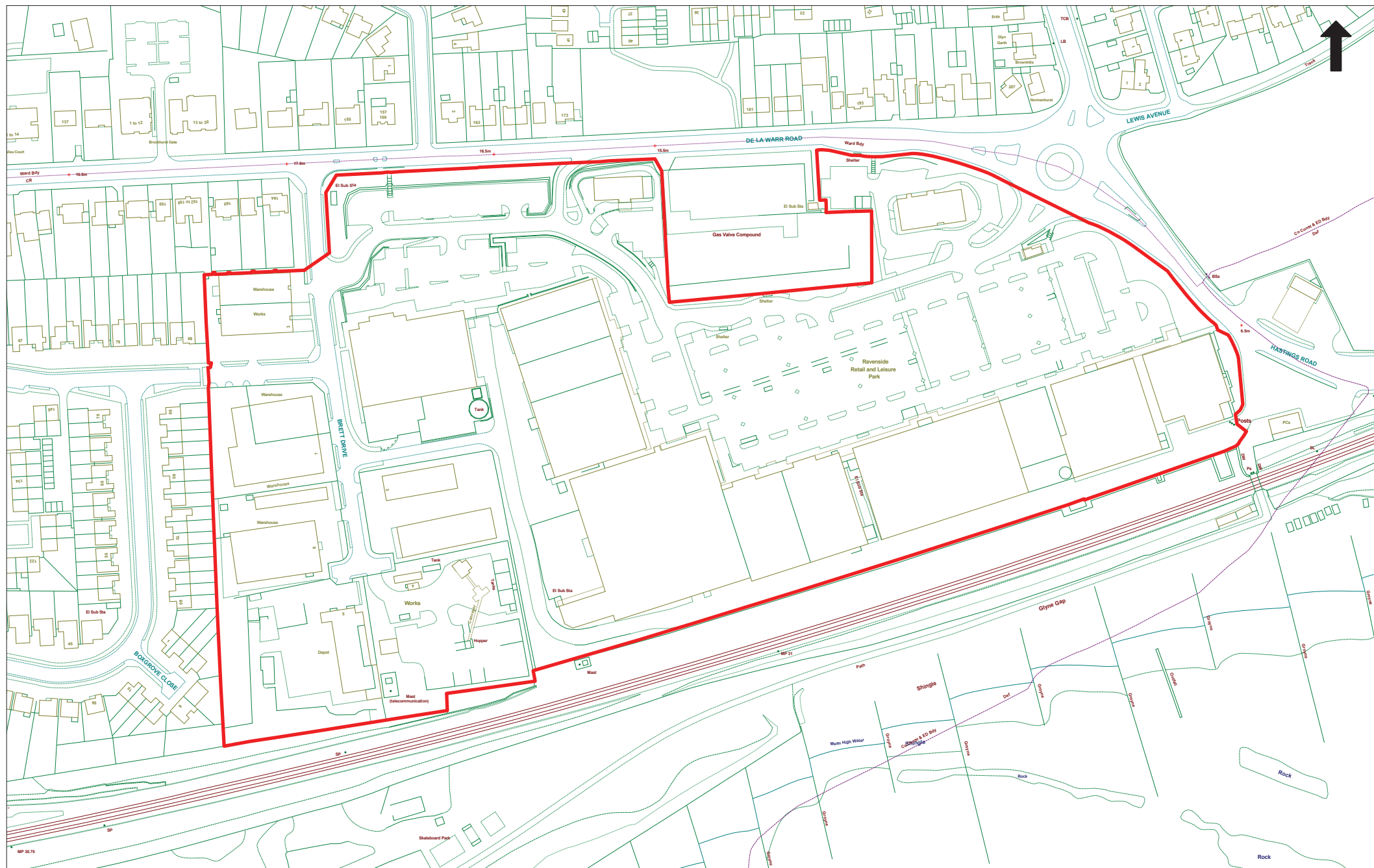
Map Ref: TQ7307

Area A(i) = 0.95 ha Area A(ii) = 1.45 ha Area A(iii) = 0.77 ha

Area B = 9.2 ha

Site 5
RAVENSIDE RETAIL PARK & BRETT DRIVE


Size	10.411 ha
Location	Out of centre (c. 2 km from nearest designated shopping frontage)
Description	<p>Existing uses: retail park, including some leisure use, and bulky goods retailer units/trade counters</p> <p>Planning history: extensive history of asset management, including restrictions on the quantum of convenience goods floorspace permitted within the Tesco and M&S (under construction)</p> <p>Existing structures: retail and trade counter warehousing and surface car parking</p> <p>Allocations/designations: none</p> <p>Ownership: Retail Park owned by Lend Lease.</p>
Availability	There are currently no vacant units within the retail park and it is understood that there is limited scope on Brett Drive; however, it is possible that the retail park owners may seek to enhance the value of their when leases on existing units expire. Subject to securing planning permission for a relaxation on existing conditions, there is scope within the existing retail units to accommodate a foodstore.
Suitability	Tesco have a large store within the retail park and there is a commitment for a new M&S, including a foodhall. Further convenience floorspace in a location a significant distance from the town centre must be considered potentially harmful to the vitality and viability of Bexhill. This location is therefore not considered suitable for further retail development.
Viability	Tesco's position as the dominant and largest store in the Bexhill catchment is means that a smaller foodstore development at the site would only be at the margins of viability. That said, it may be considered suitable in viability terms for a limited assortment discounter which frequently co-locate near large foodstore to capitalise on linked trips.
Conclusions	Further retail floorspace at this site would consolidate what is already a dominant out-of-centre location; it is therefore considered unsuitable.



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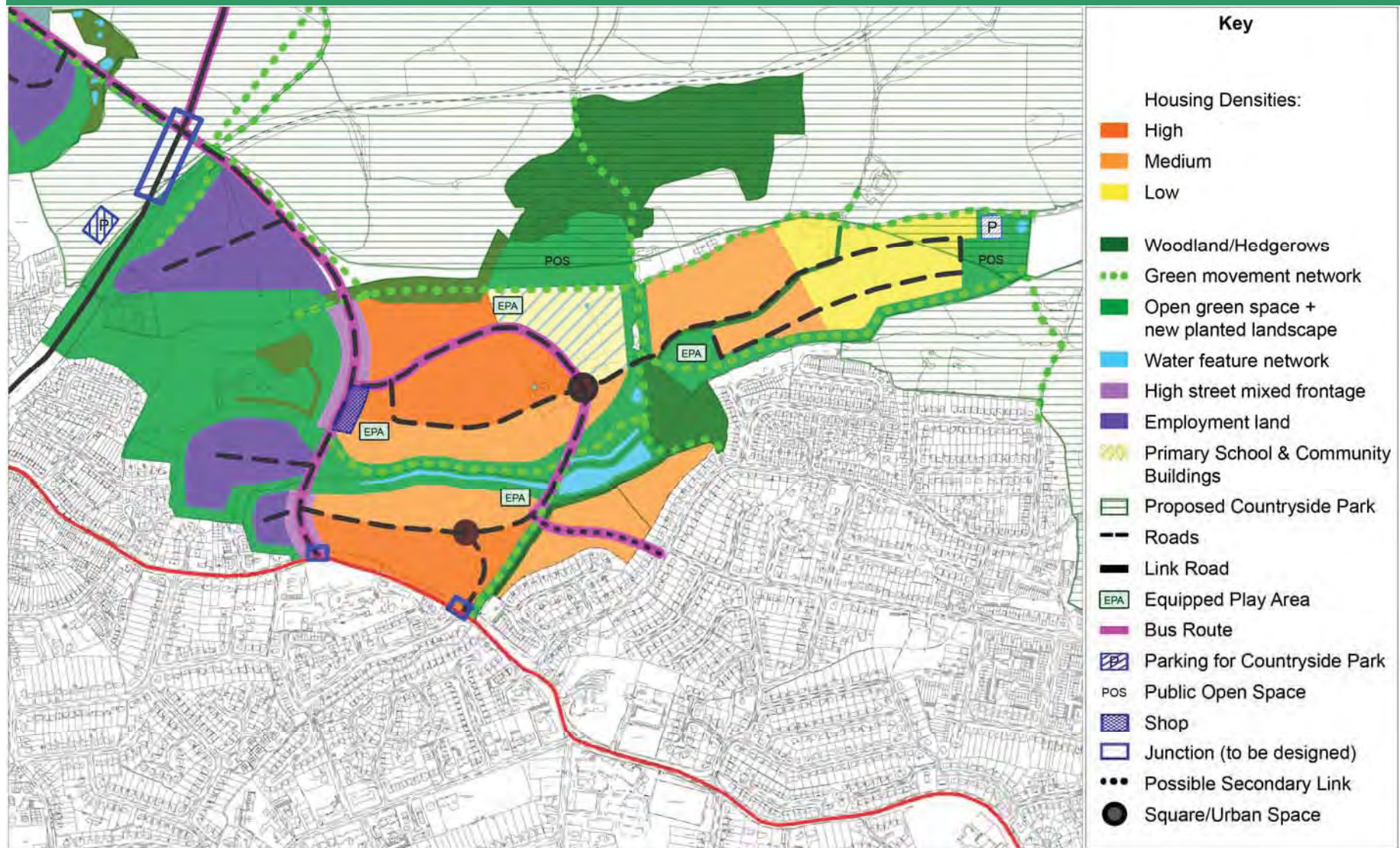
Area = 10.411 ha

Scale: 1:2500
TQ7607NW

Site 6
NORTH EAST BEXHILL LOCAL SHOPPING CENTRE


Size	Not fixed
Location	Out of centre (c. 2.1km from BTCSA) (Likely to form part of new local centre as part of the north east Bexhill development)
Description	<p>Existing uses: retail park, including some leisure use, and bulky goods retailer units/trade counters</p> <p>Planning history: no relevant history</p> <p>Existing structures: none</p> <p>Allocations/designations: Local Plan Policies BX2 and BX3 and SPD (2009) plan for substantial urban extension including new homes (over a 1,000) and business space (48,000 sqm). Includes allocation of 'shops and services to meet day-to-day needs'</p> <p>Ownership: Trinity College Cambridge</p>
Availability	Whilst the north east Bexhill development is supported in planning policy, there is no planning permission in place for residential development. The site is reliant on the construction of a link road (planning application yet to be determined). However, it is anticipated that it will become available in the short to medium term.
Suitability	The policy position supports an appropriate quantum of retail floorspace to meet day-to-day shopping needs. Given the size of the urban extension, this would suggest a convenience store rather than full range supermarket or superstore. However, given this is the main focus for housing growth in Bexhill, there may be logic in meeting retail capacity needs in this location. That said, the location is only sustainable for those new residents in this urban extension and regard should be given to the role the district centres and town centre may play in meeting shopping needs. Anything in excess of a small convenience store should therefore be subject to impact testing to ensure the development would not compromise the adopted retail hierarchy.
Viability	Given the development is on greenfield land, it is considered viable. Indeed, it is likely that a convenience store in this location could be regarded as beneficial in cash flow terms whilst the housing is brought forward.
Conclusions	The site is considered to be suitable, available and viable to meet retail needs over the course of the plan period, subject to a demonstration that the need being met is locally generated and could not be better served by existing or further retail floorspace in or at the edge of the established hierarchy of centres.

SPATIAL STRATEGY - Land North of Pebsham



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Scale: 1:9000

Figure 7: Indicative Layout for the Policy BX2 Area

Site 7
A269 CORRIDOR SITES


Size	Various – no specific area or site identified along the A269
Location	Out of centre (c. 3.5km from BTCSA, 1.7km from Sidley District Centre)
Description	<p>Existing uses: residential and greenfield</p> <p>Planning history: relating only to existing housing</p> <p>Existing structures: none, other than the existing road and a small terrace of housing</p> <p>Allocations/designations: none – beyond the settlement boundary</p> <p>Ownership: various</p>
Availability	If development were to include the existing residential properties, these would need to be acquired. Subject to this being achieved via negotiation, it is considered that sites for development could be made available. However, if needed, it is debatable whether a compelling case could be constructed to support any compulsory purchase of land.
Suitability	The area is remote from the town centre and has little or no prospect of forming sustainable linkages. It is therefore considered unsuitable.
Viability	Given it is greenfield and located on a major road into Bexhill, it is likely that development for a foodstore would be viable.
Conclusions	The site is remote from the town centre and any planned retail in this location would be contrary to the town centre-first approach outlined in the NPPF and emerging local policy.

Area of Search: North of Bexhill

