VOLUME C: TOWN CENTRE HEALTH CHECKS

1.0 INTRODUCTION

1.1. This appendix provides the findings of qualitative assessments or health check assessments of the District's three main town centres: Bexhill, Battle and Rye. The appendix also includes a review of household surveys, to gauge local perceptions of the town centres and edge of centre retail provision which have further informed the health check assessments.

Health Check Methodology

1.2. The health check provides an overview of the relative health of the centres of Bexhill, Battle and Rye by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG states that the following KPs may be relevant in assessing the health of the town centres and to support planning for the future:

- diversity of uses
- vacancy levels (ground floor)
- customers experience and behaviour
- retailer representation and intentions to change representation
- commercial rents and yields
- pedestrian flows
- accessibility
- perception of safety and occurrence of crime
- town centre environmental quality
- balance between independent and multiple stores
- evidence of barriers to new businesses opening and existing
- businesses expanding evening and night time economy offer

1.3. The health check assessment was informed by published datasets sourced from Experian Goad. A site visit was undertaken for each town centre to inform our overall assessment. Where possible, we have highlighted the changes in some of the key performance indicators (example, vacancy levels).

Stakeholder Consultation

1.4. A 'guided tour' was carried out for Bexhill with key members of LSH and members from the Chamber of Commerce. The site visits for Battle and Rye were conducted separately.

1.5. One to one telephone meetings were carried out with key stakeholders for each of the town centres to help better understand the local issues and opportunities. Contact was made with the following stakeholders:

- Bexhill on Sea Town Centre – Bexhill Chamber of Commerce and local agents
- Rye Town Centre – local commercial agents
- Battle Town Centre – Battle Chamber of Commerce

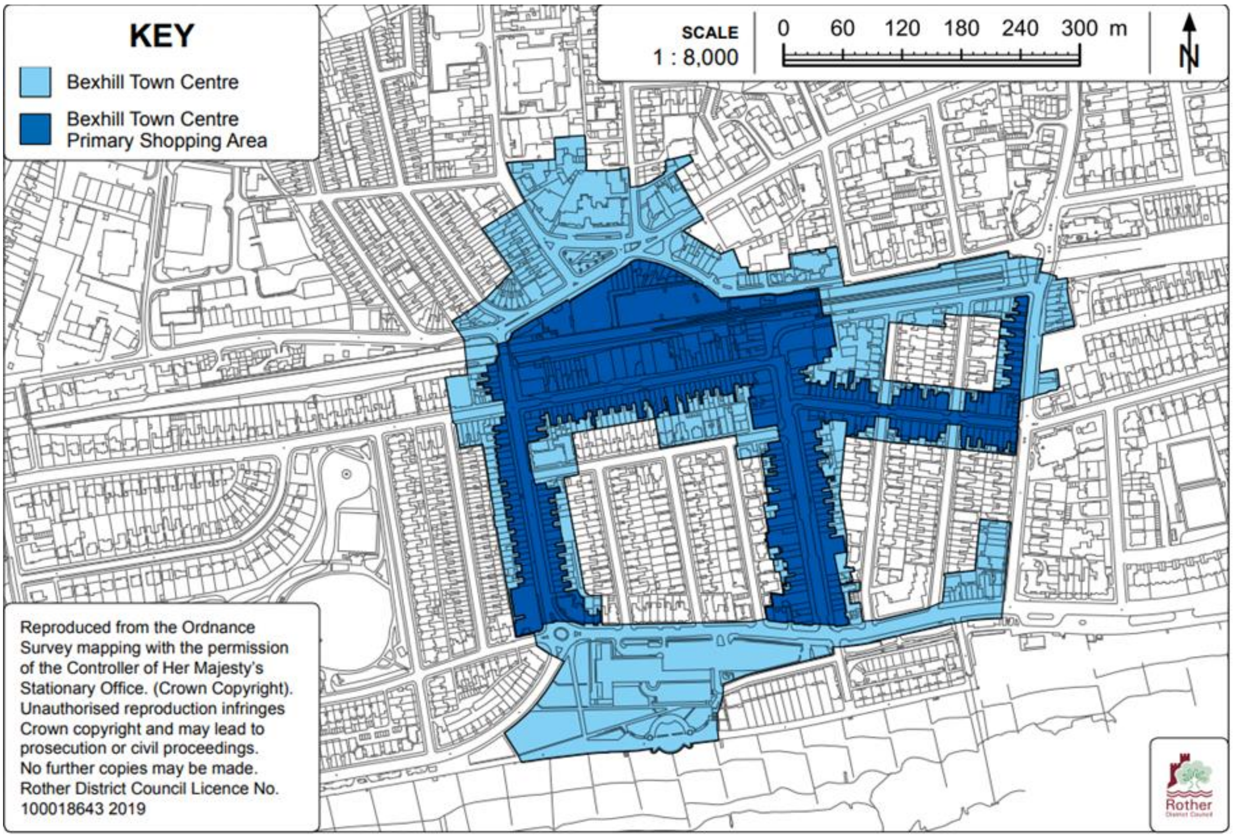
2.0 BEXHILL TOWN CENTRE

2.1. Bexhill is the largest settlement in Rother with almost half of the District's population residing there. The population demographic includes a high proportion of older people with over a third being 65 years and older. The town centre itself sits within a Conservation Area and therefore the heritage value strongly influences the town centre's development potential. The Bexhill Town Centre Conservation Area Appraisal offers some guidelines for development control purposes such as the loss of architectural features (such as fenestration) noted to result in potential harmful changes to the townscape.

2.2. The town centre and sea front architecture is largely Victorian/Edwardian with Indian and North-African influences (Bexhill Rowing Social Club and the Marina Arcade). The De La Warr Pavilion which sits on the seafront is an iconic landmark building built in 1935. The building is characterised by its modernist Art-Deco style architecture and is currently used as a multi-use venue for the arts.

2.3. Across the rest of the town centre, buildings are typically two-to-four storeys high, terraced and with ground floor shopfronts along the town centre streets which frame several rows of residential streets. Bexhill's town centre boundary and Primary Shopping Areas are defined in the Development and Site Allocations Local Plan (DaSA) and interactive policies map illustrated below.

Figure 2.1: Adopted Bexhill Town Centre and Primary Shopping Area



Source: Development and Site Allocations Local Plan (DaSA) (2019)

2.4. The main retail and commercial leisure uses are concentrated on Devonshire Road, Western Road and Sackville Road, and to a lesser extent St Leonards Road. There is a retail park located, approximately 10 minutes' drive, to the east of the town centre called Ravenside Shopping Centre, which contains a wide range of the larger, well known retailers.

Diversity of Uses

2.5. The assessment of the diversity of uses is informed by a survey of commercial outlets and floorspace undertaken in October 2021 and published by Experian Goad. Experian Goad have their own defined town centre area, although their defined boundary covers a similar area to Figure 2.1 above.

2.6. Table 2.1 below shows that Bexhill-On-Sea has a total of 55,862 sqm of commercial town centre floor space contained across 348 outlets. The town has the greatest quantum of floorspace and units of the three main centres.

Table 2.1 Bexhill Retail Composition by Outlets and Floorspace, 2021

	No. Outlets	% of Total Outlets		Gross Floorspace	% of Total Floorspace	
		Bexhill	UK Average		Bexhill	UK Average
Comparison Retail	116	33.33%	27.02%	18,441	33.01%	30.19%
Convenience Retail	28	8.05%	9.28%	6,624	11.86%	15.50%
Retail Services	64	18.39%	15.74%	8,017	14.35%	7.22%
Leisure Services	71	20.40%	25.02%	12,170	21.79%	25.93%
Financial & Business Service	36	10.34%	8.91%	6,382	11.43%	6.74%
Vacant	33	9.48%	13.82%	4,227	7.57%	13.82%
Total	348	99.99%*	99.79%*	55,862	100%	99.40%*

Source: Goad Category Report October 2021

* Where the UK average does not sum to 100% it exclude percentages for 'Other Retail'

2.7. The latest Experian Goad data for Bexhill-On-Sea (October 2021) indicates that the area has significantly more comparison retail offer than the other categories on offer (a total of 116 outlets), accounting for a third of the total retail composition and above the national average in both total outlets and total comparison retail floorspace.

2.8. There are a total of 28 convenience goods outlets which, as a proportion of total town centre units and floorspace, is below the UK average. Further, the Sainsburys north of the train tracks accounts for 1,750 sqm of the overall gross floorspace, meaning that convenience retail offer would be around 5,000 sqm within the more immediate town centre area. This gives an average size of convenience retail of 178 sq m.

2.9. Service outlets are split into three separate categories in retail, leisure and financial / business services. Retail services includes health and beauty services (beauty salons, tattoo parlour, etc.), post offices, dry cleaners and launderettes, travel agents, photo processing outlets and studios, and other personal services. Leisure service includes food and drink outlets, games of chance venues (e.g. casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, and concert halls, and hotel/guesthouse accommodation. Lastly, financial and business services include banks, building societies, property services, employment and careers.

2.10. In total, these service sectors have 171 outlets and within it, the leisure services category having the highest representation with 71 outlets.

2.11. Table 2.2 overleaf shows the majority of the diversity of uses in the leisure service sector and the comparison to the UK average.

Table 2.2: Bexhill Leisure Services Composition Summary by Outlets and Floorspace

	No. Outlets	% of Total Outlets		Gross Floorspace	% of Total Floorspace	
		Bexhill	UK Average		Bexhill	UK Average
Bars & Wine Bars	5	1.44%	2.18%	1,003	1.80%	2.31%
Cafes	20	5.75%	4.93%	2,648	4.74%	2.80%
Fast Food & Takeaways	14	4.02%	6.01%	2,072	3.71%	2.99%
Hotels & Guest Houses	2	0.57%	0.87%	3,800	0.63%	2.53%
Public Houses	5	1.44%	2.61%	1,598	2.86%	3.46%
Restaurants	18	5.17%	4.77%	3,075	5.50%	4.09%
Total	64	18.39%	21.37%	14196	19.24%	18.18%

Source: Goad Category Report October 2021

2.12. The leisure service sector is almost 5% below the UK average with lower average representation in hotel/guest houses and public houses, bars and wine bars, fast food takeaways and pubs. The Experian Goad survey indicates only 2 hotel/guest house outlets which is low given the town benefits from a seaside location.

2.13. There are a total of 36 outlets in the financial and business services sector and the highest proportion is in property services with 14 outlets. In relation to floorspace, the figures are more balanced with legal services, property services and retail banks having between 1,100 and 1,700 sqm. The number of financial and business services outlets and the quantum of floorspace are both higher than the UK average.

2.14. Retail services in Bexhill is dominated by health and beauty with a total of 41 outlets which accounts for over two thirds of the entire sector (64%). Both the number of outlets and the total floorspace are above the national average.

Vacancy Levels

2.15. Experian Goad identified 33 vacant units in total in October 2021, which equates to a vacancy rate of 9.48% and is below the national average of 13.82%.

2.16. The figure overleaf shows how vacancies recorded by Experian Goad in Bexhill are dispersed across the town centre. It shows clusters of vacancies at the corner of Sackville Road and the Marina, in the middle of Devonshire Road; and towards the eastern end of St Leonards Road.

2.17. It was also acknowledged during discussions with key stakeholders that some vacant units, particularly along Sackville Road, had been recently let with tenants soon to move in.

2.18. The site visit undertaken in July 2022 also identified that the most notable vacancies are located on the corner of Sackville Road and Marina (which appear to have never been occupied), and The Edinburgh Mill which has been vacant for an extended period.

Figure 2.2: Vacancies in Bexhill-on-Sea (October 2021)

Source: Experian Goad Category

Note: vacancies highlighted in orange

Commercial Property Indicators

2.19. The average rent along Sackville Road is approximately £6.50 - £7 per sq ft and Devonshire Road is more than double in comparison. The commercial market is strong and properties are being let, on average, within 2 weeks.

2.20. Confirmation was obtained on the vacant retail units on the corner of Sackville Road and the Marina. These units have never been let. We understand that there is an intention to convert the units into residential use. This would be a notable loss given their prominent roadside location and connection between the seafront and the adjoining active ground floor frontages on Sackville Road.

2.21. There is limited data on yields for retail/commercial buildings in the town centre due to a lack of transactions that have taken place. However, local commercial agents have indicated that commercial properties are achieving yields of approximately 8-9%, which is relatively poor performing, but typical for a tertiary town such as Bexhill. By comparison, Rye is achieving average yields of 6-6.5%.

Retailer Representation

2.22. Retailer representation is divided into two main groups of independent and multiples, multiples defined as part of a network of nine or more outlets, and the presence of multiples can enhance the appeal of a centre to local customers.

2.23. The table below shows the representation of multiples across different sectors. As expected, retail (comparison and convenience) account for the majority of multiples with representation for this sector above the UK average. There is above average representation for multiples for retail service and financial & business sectors, while the representation of leisure multiples lags behind, less than half of the UK average.

Table 1.3: Multiple Counts by Sector

Multiples Representation	No. Outlets	% of Total Outlets	
		Bexhill	UK Average
Comparison	21	42.86%	40.97%
Convenience	8	16.33%	12.29%
Retail Service	7	14.29%	9.99%
Leisure Services	5	10.20%	23.20%
Financial & Business Services	8	16.33%	13.55%
Total	49		

Source: Goad Category Report October 2021

2.24. Looking more closely at multiple representation, the town centre has a number of anchor retailers including the large Sainsbury's. Otherwise, the town does not benefit from any notable anchor comparison retailers, with key comparison multiples mainly limited to Shoe Zone and M&Co and typical town centre operators such as Boots, WHSmith, Savers and telecom brands.

2.25. The Woollen Mill was a regional multiple store which was located on Devonshire Road that, due to the covid-19 pandemic, had to close the Bexhill-On-Sea outlet which remains vacant and has been difficult to re-occupy.

2.26. The table below shows a range of the multiples located within the town centre:

Table 1.4: Retail Multiple Representation Bexhill

Convenience	Comparison	Services	F&B
Sainsbury's	Vodafone	Betzone	Subway
Iceland	Boots	Nationwide	Wetherspoons
Holland & Barrett	Savers	Lloyds	Dominos
Co-op	Shoe Zone	HSBC	
	WHSmith		
	Clinton		
	M&Co		
	Card Factory		

Source: Goad Category Report October 2021

2.27. The town centre has a reasonable mix of multiples although it is evident that there is more emphasis placed on independent retail. This is particularly evident along Sackville Road where there are several vintage style shops, which provides interest and character to Bexhill's retail and sets it apart from Rye and Battle.

2.28. As of November 2022 a review of published operator requirements identified 10 recorded requirements from retail and leisure operators since November 2021, the most relevant of which are listed in the table overleaf:

Table 1.5: Retail and Leisure Requirements – November 2022

Recorded Date	Operator	Operator Type	Goods Type	Size (sq m)	
				(Min)	(Max)
Mar-22	Lidl	Supermarket	Convenience	1,672	2,415
June-22	Sense	Charity	Comparison	111	557
Jul-22	Hobbycraft	Arts and crafts	Comparison	465	929
Mar-22	Matalan	Fashion and homeware	Comparison	1,394	2,323
Nov-21	The Range	Home and garden centre	Comparison	1,394	2,787
Feb-22	Travelodge	Hotel	Leisure	929	3,716
Jan-22	Taco Bell	Fast-food restaurant	Leisure	111	232
Oct-22	Pizza Hut Delivery	Takeaway	Leisure	60	195
Total Floorspace:				6,025	12,597

Source: Therequirementlist.com

2.29. Lidl is seeking a site in Bexhill in a prominent location with easy access and strong pedestrian or traffic flows, either in town centres / edge of centres and retail parks. Operators such as Hobbycraft and The Range usually prefer standalone units and retail parks with car parking, however Matalan is interested in town centre locations as well as the retail parks. We are also aware that Home Bargains has a requirement for a site in Bexhill, albeit the retailer is only considering retail park and standalone sites in the area. Home Bargains typically require accommodation in the range of 465 sqm gross and 3,716 sqm gross.

2.30. Within the leisure sector Travelodge is also a notable operator seeking a site in Bexhill which is of particular interest as Hotels are a sector within the town that has a poor representation, identified in Table 2.2.

2.31. The food and beverage requirements include Taco Bell and Pizza Hut Delivery. Both operators are seeking high street locations and Pizza Hut is specifically considering a delivery outlet, which also caters for collections / takeaways, however it is noted that Bexhill is a not a priority location. In addition to a high street location, Taco Bell are also seeking a Drive Thru outlet which would likely be located out of town.

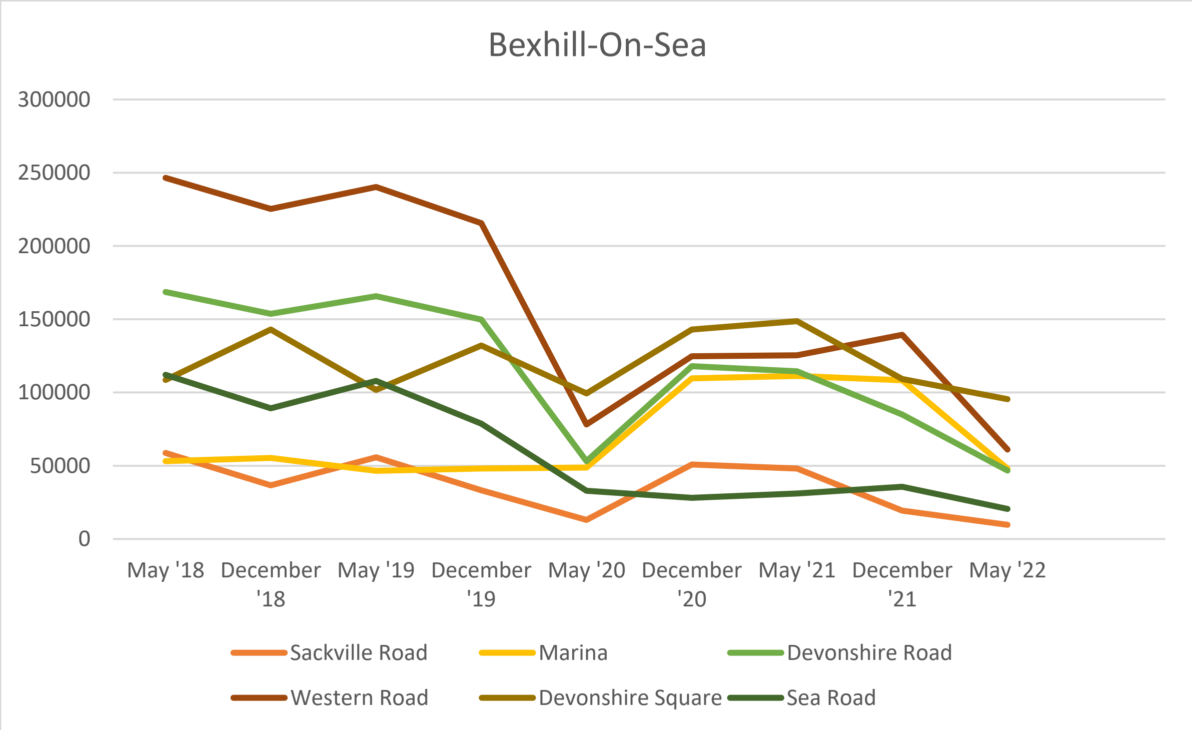
2.32. Lastly, several charities are interested in the Bexhill location, but only Sense is considering city centres, high streets, shopping centres and town centres.

Pedestrian Flows

2.33. Footfall data has been gathered from Datscha, who collect data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

2.34. In total, six locations were monitored across the town centre along the key streets. The figure overleaf shows how footfall patterns have changed since 2018 capturing trends pre-pandemic, during and after national restrictions.

Figure 2.3: Bexhill Footfall Counts Between May 2018 – May 2022



Source: Datscha

2.35. Devonshire Square acts as a key pedestrian link between the train station (and those living north of it), and the main high street of Devonshire Road. This has resulted in the area having a more consistent pedestrian flow, similar to Sackville Road albeit the latter having a lower overall footfall presence. The graph illustrates the decline in footfall during the pandemic, most notably on Western Road and Devonshire Road.

2.36. Although footfall has increased more recently, it appears that footfall has not yet recovered to pre-pandemic levels. Footfall along the Marina has recovered well, and the data indicates that the area was being used throughout the pandemic, with footfall remaining static. This will likely correlate with residents walking and exercising during the national lockdowns.

Accessibility

2.37. The town centre does not have a clear sense of arrival and there isn't a definitive 'town centre' area. This is emphasised by the town centre being car dominated and not having a defined pedestrian area which could help create a focal point and meeting area for visitors. The town's streets mostly have parking along both sides of roads throughout. The road networks are linear and have acute corner gradients which can act as traffic calming measures as vehicles must slow down to turn safely.

2.38. The train station is located at the northern portion of the town centre, however the exit faces away from the town centre and it isn't clear where visitors should go initially. An obvious improvement would be to reopen the former station entrance/exit located at the northern end of Devonshire Road/ Devonshire Square. This would naturally draw visitors onto the high street. The station offers direct links to London, although they have been described as slow and there is a desire amongst the local residents for faster trains. Nearby destinations linked by rail include Hastings and Eastbourne. Bus routes run along the Marina, Devonshire Road and Sackville Road.

2.39. There is a footbridge which crosses over the train tracks to connect pedestrians to the Town Centre which leads out to Devonshire Square, although this is a one-way road and does not have a sense, or functionality, of a square. This area is used for the local market, which operates one day a week.

2.40. Pedestrians are restricted to walking along the footpath throughout the town, with the obvious exception of the promenade.

2.41. The town provides bollards at key areas, along footpaths and has low / dropped kerbs which help those who may be mobility impaired. There are approximately 3-4 key crossings in the town centre which are identified by a zebra crossing which also have tactile paving.

2.42. The town centre is compact, comprising approximately 5-6 streets with active ground floor uses (Sackville Road, Marina, Devonshire Road, Western Road, Sea Road, St Leonards Road), making the town centre walkable and accessible.

2.43. The speed limit is 30mph throughout. The only noticeable speed restrictions are put in place along the Marina, where the speed limit is restricted to 20mph, which starts and ends between Sackville Road and Devonshire Road. As the layout of the town centre is essentially a grid system, the town is easy to navigate around and easy to access key areas.

Parking Provision

2.44. The town centre has a lot of on street parking provided throughout and the majority of this parking is metered. The seafront De La Warr Parade has a RingGo parking which allows parking for up to 10 hours, all day parking costing £2. Many streets also offer free 2 hour on street parking. There are three main car parks in Bexhill:

- De La Warr Pavilion: 161 spaces: £2.50 for 2 hours
- Eversley Road: 35 spaces: £2.00 for 2 hours
- Sainsbury's Car Park: Free: 1.5 hours max stay

Crime and Safety

2.45. Incidences of crime reported to Sussex Police are recorded quarterly with information on reported crime dating back to July-September 2018. This 3-year period has seen a reduction in almost half of all crime reported.

2.46. Figure 2.4 overleaf identifies 'Central Bexhill' boundary as defined by Sussex Policy and the hotspots for crime within, based on incidences of crime report in May 2022. The most commonly reported crimes reported are:

- Violence and sexual offences 32
- Anti-social behaviour 21
- Criminal damage and arson 18
- All other crime 29

2.47. It is evident that the crime is focused around the Sainsbury's area, the train station and the east side of Egerton Park and also north of the railway line around Western Road.

Figure 2.4: Crime Hotspots in Bexhill

Source: Police.co.uk

Markets and Events

2.48. Bexhill operates a farmer's market which runs every Friday between 08.00-12:00 and is located in Devonshire Square. Market stalls offer local meat and game, artisan cheeses and bread, spices and herbs, specialty pastries, pies, free range eggs, local fresh fruit and amongst a variety of other food goods. The market was formed by the Bexhill and Rother Environmental Group and supported by the Bexhill Town Team. A Steering Group is responsible for planning the market, selecting stallholders of which there are currently 9 in total.

2.49. The limited operation of the market means that without this Devonshire Square has little footfall and is under utilised. If the station entrance was reopened this area would be considerably more animated and serve as a gathering spot. Stakeholder feedback also identified a demand for the market to be more frequent.

Town Centre Environmental Quality

2.50. The town centre is framed by ground floor retail and typical high streets, however the streets within these high streets contain mostly terrace style housing. Some of the houses have been converted into businesses such as dental practices.

2.51. The Victorian / Edwardian buildings throughout the town appear to be in reasonable condition and there are no noticeable buildings that are in disrepair which would contribute to a sense of neglect and urban decay. There are a lot of buildings which are undergoing building works and have scaffolding on the outside, particularly along the Marina.

2.52. The town centre is within a Conservation Area and consequently any development will have a higher level of restrictions placed on them in terms of maintenance, repair and refurbishment. As a result, it is noticeable that a lot of the fenestration in particular is in poor condition. There are also noticeable inconsistencies with some older buildings having newer style windows and frames, which compared with the original sash windows can look out of place in parts.

2.53. Red tar mac is a key town characteristic along Devonshire Road, and although it doesn't seem to have great support in how it looks or what it adds the aesthetic of the town (according to some stakeholder feedback), it does provide a sense of Devonshire being the main high street, as it stands out from the rest.

2.54. The tarmac and road paintings look much more recent / renewed here, but this hasn't been delivered throughout the town centre, which appears slightly patchwork like. In general, the paving is in good condition however there are areas where the paving is very dirty and unpleasant, particularly along Western Road. The street furniture provided throughout is in reasonable condition.

2.55. There are not many trees in the town centre with the main trees being located on Devonshire Road, but overall the streetscape lacks in greenery and appears quite hard, with wide roads, cars, and wide paving. There is a pleasant strip of wild flowers planted along the Marina Arcade and there is a large green open space around the Pavilion. Near here, there is also a water fountain feature along the promenade which is a good feature for children to play in, however it is understood that this has not been functioning for some time.

2.56. With the exception of the promenade, there isn't any separate infrastructure provided for cyclists or pedestrians.

Barriers to Business

2.57. Key stakeholders were contacted to provide insight and identify barriers to businesses, with their local knowledge. Feedback was obtained from the Bexhill Chamber of Commerce and local commercial agents. Key themes raised by stakeholders are highlighted as follows:

2.58. It is evident that the retail market is buoyed by the independent sector, which means that it falls on this sector to support local retailing needs.

2.59. Digital connectivity and slow broadband was identified as a barrier to business and we understand that the Council is considering investing in high speed broadband.

2.60. Physical connectivity was also expressed as a barrier to business, with the road infrastructure being in poor condition, and key roads into the area only being single track. Additionally, the trains in this area were described as slow and intermittent. Unsurprisingly, there is a strong desire to see the introduction of high speed rail. The railway itself separates the town from a large residential area, and the A259 creates another major split from the town. Also, Bexhill has no pedestrianised zones in the town centre, which was expressed as being rare for a seaside town. Although businesses are often against pedestrianisation (with the perception that less cars means less customers) Devonshire Road presents an opportunity for a pedestrian street, linking it to Devonshire square, the railway and even the seafront.

2.61. The proximity to Hastings and Eastbourne draw people out of Bexhill and also prevent them from visiting, and locals are aware that they must have something different to offer. We understand that the recent success of Sackville Road is a consequence of a more unique style of retail offer.

2.62. Stakeholders emphasised how having a lack of hotel accommodation hinders business growth and visitor economy potential. They identified how hotels have been converted into residential use while the failure to secure deals with hotel brands also is limiting opportunities to attract national food and beverage (F&B) chains and improved F&B offer in general to the town centre. Furthermore, the requirements list (Table 1.5) identified that Travelodge is seeking a site in Bexhill which demonstrates that there is interest from hotel operators, effectively meaning a potential supply and an evident demand for this type of use in the area.

2.63. Other barriers to business are more general such as businesses being impacted by the pandemic, and the current cost of living crisis and rising operation costs. Insight was provided by stakeholders that many local businesses have “hidden debt” and those businesses will be vulnerable to further economic impacts.

Evening and Night Time Economy

2.64. A total of 60 retailers were sampled in Bexhill which included food & beverage (F&B), comparison, convenience and services along the three main streets to find out the opening and closing times of the retail offer, and whether they are open are shut on Sundays. This allows for identifying the level of the evening, nigh time and weekend economy.

2.65. Opening times vary with the earliest opening at 06:00 and the latest opening at 17:00, although the vast majority of retailers opening between 09:00-10:00am (36). Sainsbury’s closes at 8pm on Monday to Friday, is open until 4pm on Sundays. These opening hours are surprising given the store is the only food anchor serving the town centre. In general, most retailers surveyed close between 16:00-18:00 (32) with 13 retailers closing between 21:00-23:00 and these are predominately F&B outlets. Therefore, there is a small night time economy which contributes and benefits the town.

2.66. It was recorded that 36 retailers of the sampled 60 retailers are closed on Sundays while 24 are open, with most services and comparison retail closing and F&B and convenience remaining open (with the exception Jempson’s Local).

Edge and Out of Centre Retail and Leisure Provision

2.67. The following provides a brief overview on retail and leisure developments that are not located in the town centre of Bexhill.

2.68. The Ravenside Retail Park is located to the east of Bexhill-On-Sea town centre, less than a 10-minute drive, adjacent to Glyne Gap Beach.

2.69. It is noted that the Next store has now closed and no longer occupies a unit at the retail park, which will be loss for the area given the popularity of the brand. However, Next was trading from a relatively small unit and this may have been a deciding factor in their decision to move as the retailer is focusing on expansion of larger stores. The vacant store is now occupied by Tapi Carpets. The retail park contains 13 multiples (listed below) and the Bexhill Leisure Pool.

- Marks & Spencer – 5,109 sqm
- B&Q – 3,940 sqm
- Wickes – 2,508 sqm
- Currys / PC World – 1,439 sqm
- Tapi Carpets – 960 sqm
- B&M – 1,499 sqm
- Tesco – 6,503 sqm
- Boots – 956 sqm
- Halfords – 951 sqm
- Poundland – 857 sqm
- Pets at Home – 575 sqm

- McDonalds – 418 sqm
- KFC – 268 sqm

2.70. From this list, it is evident that Ravenside Retail Park would draw locals away from the town centre given the presence of key retail and F&B brands, most of which are not available in any of the District's town centres. The attraction of the retail park will be further enhanced by the availability of free customer car parking.

2.71. An Aldi is located just north of the town centre and provides 1.5 hours free parking.

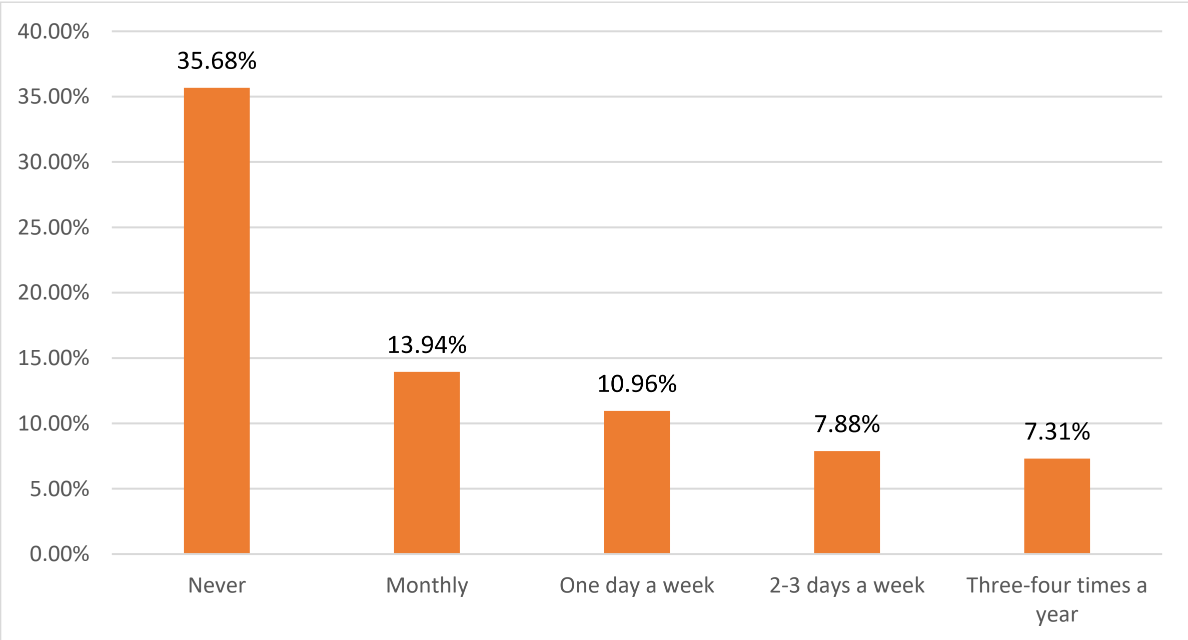
Customer Perception of Bexhill Town Centre

2.72. The customer perception of the town centre was obtained from household telephone interview surveys (HTIS) conducted in October 2021. The surveys focused on what people like and dislike about the town centre, what could be improved and what would likely encourage them to frequent the town centre more often. The full results can be viewed in Volume D. This section provides a summary of the key findings on questions put to respondents to gauge their perception of Bexhill Town Centre.

How often do you or your household visit Bexhill Town Centre for shopping?

2.73. The majority of survey respondents said that they never visit the Town Centre for shopping (35.68%) and just under 11% of overall responses answered that they go into town for shopping one day a week. Only 1.43% of the survey respondents go into Bexhill Town Centre for shopping on a daily basis.

Figure 1.5: Frequency of Visits to Bexhill



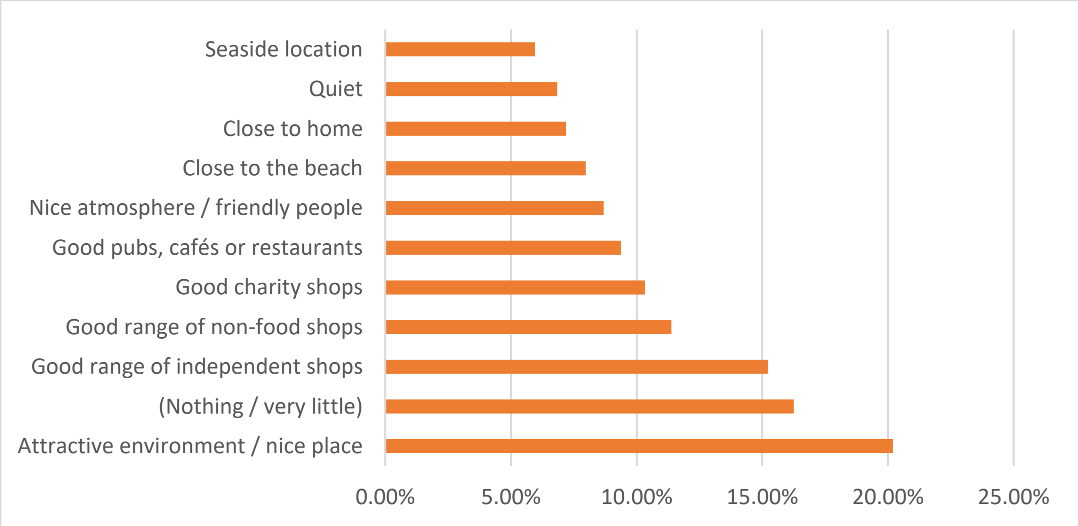
Source: Q25, HTIS, Volume D

What do you like about Bexhill-on-Sea Town Centre?

2.74. The majority of people perceive Bexhill to have an attractive and nice environment (20.20%) but on the contrary 16.25% of the respondents found that they like nothing, or very little of the town centre. Other respondents mentioned the good range of independent shops and interestingly only 5.95% of respondents like Bexhill because of its seaside location. Other, more related, responses in relation to what people like about the town centre included the quiet and friendly nature of the town

2.75. The figure overleaf summarises the most popular responses on what respondents most like about Bexhill.

Figure 1.6: What respondents like about Bexhill



Source: Q26, HTIS, Volume D

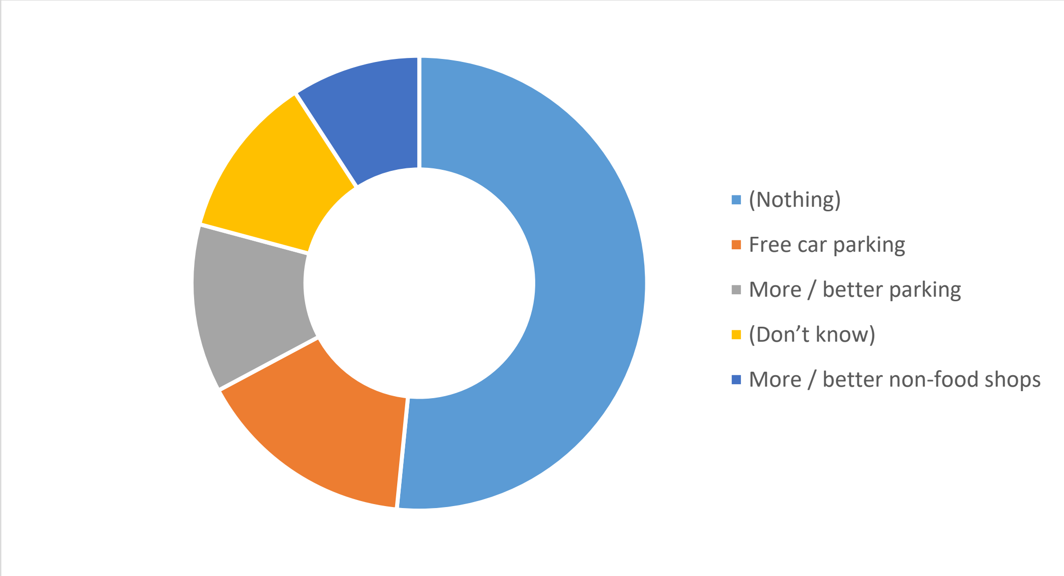
What could be improved about Bexhill-on-Sea Town Centre that would make you visit more often?

2.76. Survey respondents were also given the opportunity to give their viewpoint on what could be improved in Bexhill and Figure 2.7 below illustrates that almost half of the respondents said that nothing could improve the Town Centre. This is differentiated from those you didn't know what would improve which alone was almost 10% of the responses.

2.77. The other responses included free or better parking which is surprising given that our understanding is that the parking in Bexhill is much more affordable compared to other towns, particularly for a seaside town.

2.78. The subsequent survey questions then asked what would encourage the respondent to visit the town centre more often, particularly in the evening time, however the vast majority responded with nothing or that they did not know. This could mean that the majority of people are content with the town centre as it is.

Figure 2.7: What could be improved in Bexhill to encourage more visits?



Source: Q27, HTIS, Volume D

Summary

2.79. The findings of the health check have informed the following SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Bexhill Town Centre:

Strengths

- Seaside location that is easily reached by rail and unique in that the town centre is directly accessible from the seafront.
- Landmark architecture and popular arts venue with the De La Warr Pavilion that will benefit from a planned upgrade through the Government's High Street Fund scheme.
- Affordable rents for commercial businesses which have resulted in low vacancies which suggest strong demand for commercial accommodation in the town centre.
- Strong local independent economy, which helps to control rents and allowing the rental values to remain more affordable.
- Vintage shops along Sackville Road provide a more unique and distinctive retail offer.
- Affordable parking which provides an incentive for more people to visit and stay longer, potentially increasing dwell time and retention.
- Largest town in the district and has the largest quantum of retail floorspace and the widest range of national multiples.
- The town benefits from having a key anchor store within close proximity to the town centre boundary in Sainsbury's.
- A wide promenade along the beachfront, which encourages walking and gather points for the community.
- A lot of housing within the town centre, which means there is a relatively strong residential catchment in the heart of the town centre.

Weaknesses

- The centre has a lack of visitor accommodation particularly hotels, which is limiting the scope to attract overnight guests, an untapped economy.
- There is a lack of large retailers to support footfall and therefore a greater reliance on independents to meet customer needs/ expectations for retail offer.
- Poor public transport to wider locations such as London and Hastings and the networks are slow.
- Poor road conditions which can be perceived as the town lacking in investment in infrastructure.
- The town centre has no pedestrianised streets resulting, which could otherwise promote more safe pedestrian environments, street events and pavement dining.
- Long-term / persistent vacant retail units in prime locations which not only impact the street scape but are a loss to the economy and a lost opportunity, with particular emphasis on the corner units at Sackville Road and the Marina.
- A potential loss of office employment with the potential relocation of Hastings Direct affects the local economy, although not located directly in the town centre.
- A lack of upkeep and maintenance of public spaces in key areas, which results in the town not being presented in its best form.
- The Conservation Area restricts redevelopment opportunities and the desire for larger retailers to locate into the town centre.
- The town has poor digital connections, which can be a barrier to businesses that require fast internet speeds.
- The traditional economic function has been eroded, as the tourist/visitor industry has declined which has not been replaced by alternative business investment.
- The town centre faces significant pressure from competing towns such as Hastings and Eastbourne, which hinders economic growth.

Opportunities:

- Significant potential to promote the overnight visitor market by investing in hotels, particularly branded operators.
- Reopen the rail station entrance/exit at the top of Devonshire Street / Devonshire Gardens to link the station better to the pedestrian flow into the town centre.
- Potential to increase the green infrastructure throughout the town as greener / softer physical landscape can have significant benefits to health and communities.
- Devonshire Square being more of a focal point and gathering place and with that, more emphasis on improving the market and other community events.
- To open up the prime retail location vacancies and allow for more diversification of town centre businesses, including less reliance on retail.
- High-speed rail to better connect the town to the wider region, which could attract new expenditure through new visitors and residents.
- Potential to invest in faster broadband to support businesses.
- Partial pedestrianisation of the high street along Devonshire Road could provide a more inviting thoroughfare from the station to the seafront and attract more footfall and cycling infrastructure investment.
- To redevelop the Sainsbury's site, which is in the Council's ownership.

- There is potential to drive cultural investment and tourism sector.
- Plans to upgrade the De La Warr Pavilion through Levelling Up funding will help to preserve and strengthen the role of this important asset for Bexhill including promoting cultural programmes and opportunities to use the pavilion for conferences and/or weddings.

Threats

- The economic downturn due to cost of living and rising operational costs, with impacts on supply chains that could in turn could impact on retailers and other town centre businesses.
- Permitted Development Rights could lead to a loss of the towns occupied retail units as changes from shops to residential can occur outside of planning controls.
- Major shop retailers are relocating to other towns contributing to the overall decline.
- Reopening the rail station entrance / exit at the top of Devonshire Street could impact on the businesses on Sea Road
- Former hotels are not being replaced and the lack of hotel provision, which is expected for a seaside location, removes the opportunity for town centre businesses to capitalise on the overnight visitor trade.
- The town is competing with other larger towns, such as Hastings and Eastbourne, and Ravenside Retail Park. These locations are drawing customers from the town retail offering is stronger, which will have a knock on effect on the town's economy and the potential to support linked trips with non-retail town centre businesses.
- Online shopping presents a threat to the town centre particularly as the pandemic has increased online market share. The potential to claw back expenditure from online sales will be dependent on the town centre improving its profile as a shopping and leisure destination.

2.80. In summary, Bexhill is largest town centre in the District and is anchored by Sainsbury's north of the town centre. Despite the ongoing pressures town centres face, the town is performing reasonably well and has low vacancy rates, low rates and a strong local independent trader economy. In general, the commercial market is relatively strong the town is lagging behind in its leisure offer.

2.81. Due to the historic nature of the town centre and the buildings within it, there are signs of general wear on the buildings roofs and fenestration, which according to local stakeholders is difficult to maintain due to the buildings being listed. The town needs to improve on some general maintenance and there appears to be a large gap in the market in terms of hotels, which is surprising given the seaside and beach location of the town centre. The town is also rather vulnerable to competing towns, in particular Hastings and Eastbourne. Like other centres in the District, Bexhill will also be vulnerable to economic head winds such as rising costs for businesses and a limit on household disposable income as household costs and debt rise.

3.0 RYE TOWN CENTRE

3.1. Rye is an ancient citadel town of national historic importance and high architectural value. Rye is now a successful market town and is the main service and employment centre in eastern Rother. The town attracts significant numbers of visitors, particularly during the summer months, with the historic core of the town being a main attraction. This means that local tourism is a key driver of Rye's local economy. The town centre was first designated a Conservation Area 1969 meaning development is more restricted than non-designated areas. The streetscape architecture is largely medieval and the Citadel has an important visual relationship in the wider landscape.

3.2. The population of Rye Parish is less than 5,000 and the demographic has a higher proportion of 15-29 year olds (18.1%) compared to the District as a whole (13%). While the settlement is considered an affluent area, there are significant pockets of deprivation within the town centre, including child poverty and high unemployment (particularly seasonal), and significant barriers to housing and services.

3.3. The Rye Neighbourhood Plan (draft) 2019 identifies the Core Town Centre Area in blue, illustrated below:

Figure 3.1: Rye Neighbourhood Plan – Core Town Centre Area

Source: Rye Neighbourhood Plan (draft) 2019

Diversity of Uses

3.4. The assessment of diversity of uses is informed by a survey of commercial floorspace undertaken in February 2022 and published by Experian Goad.

3.5. Table 3.1 overleaf shows that Rye has a total of 23,086 sqm of commercial town centre floorspace contained across 209 outlets.

Table 3.1: Rye Retail Composition by Outlets and Floorspace, 2021

	No. Outlets	% of Total Outlets		Gross Floorspace	% of Total Floorspace	
		Rye	UK Average		Rye	UK Average
Comparison Retail	87	41.63%	27.02%	7,999	34.65%	30.19%
Convenience Retail	19	9.09%	9.28%	3,447	14.93%	15.50%
Retail Services	15	7.18%	15.74%	1,384	6.00%	7.22%
Leisure Services	52	24.88%	25.02%	5,779	25.03%	25.93%
Financial & Business Service	10	4.78%	8.91%	1,189	5.15%	6.74%
Vacant	26	12.44%	13.82%	3,289	14.25%	13.82%
Total	209	100%	97.79*%	23086	100%	99.40*%

Source: Goad Category Report February 2022

*note, the totals do not add up to 100% as they are not accounting for 'Other Retail'.

3.6. The more dominant town centre retail uses are comparison retail which accounts for 41.63% of all town centre commercial units. This is almost 15% above the UK average. On further analysis of comparison retail offer it is revealed that the town has a high number of antique shops (15), arts and art dealers (8), crafts gifts, china & glass (11), those 3 alone making up for over 1 third of the total comparison retailers. These prominent comparison goods categories are typical for affluent and tourist oriented towns.

3.7. The more dominant town centre retail uses are comparison retail which accounts for 41.63% of all town centre commercial units. This is almost 15% above the UK average. On further analysis of comparison retail offer it is revealed that the town has a high number of antique shops (15), arts and art dealers (8), crafts gifts, china & glass (11), those 3 alone making up for over 1 third of the total comparison retailers. These prominent comparison goods categories are typical for affluent and tourist oriented towns.

3.8. It is noted that the proportion of convenience outlets in Rye sits just below the UK average. The town is not anchored by any large foodstore, which is surprising for a town of Rye's size. Main food shopping offer is limited to a modest sized Jempson's supermarket and supplemented by smaller traditional convenience retailers across the town centre. The nearest large foodstore is the Jempson's Superstore at Peasmarsh.

3.9. Table 3.2 below shows the range of leisure service uses available in the town centre and how the number of outlets and gross floorspace compare to the UK average.

Table 3.2: Rye Leisure Services Composition Summary by Outlets and Floorspace

	No. Outlets	% of Total Outlets		Gross Floorspace	% of Total Floorspace	
		Rye	UK Average		Rye	UK Average
Bars & Wine Bars	1	0.48%	2.18%	46	0.20%	2.31%
Cafes	10	4.78%	4.93%	771	3.34%	2.80%
Hotels & Guest Houses	8	3.83%	0.87%	11,100	4.47%	2.53%
Fast Food & Takeaways	6	2.87%	6.01%	297	1.29%	2.99%
Public Houses	11	5.26%	2.61%	1,867	8.09%	3.46%
Restaurants	11	5.26%	4.77%	1,087	4.71%	4.09%
Total	47	22.48%	21.37%	15,169	22.10%	18.18%

Source: Goad Category Report February 2022

3.10. The range of classifications within the leisure service sector is relatively well-balanced. There is a much lower representation of fast food and takeaways which is expected due to the idyllic and historic setting of the town, and also a much higher proportion of hotels and guesthouses than the national average as the town has a large visitor economy.

Vacancy levels

3.11. Experian Goad identified 26 vacant units in total which equate to 12.44% and is slightly below the national average at 13.82%. The GOAD map illustrated below identifies how these vacancies are dispersed throughout the town centre, showing that the majority of vacancies are located along the High Street. However, the site visit undertaken on the 12th July identified that some of these had been occupied, such as ‘Ethel Loves Me’ and a new estate agents and restaurant (Ono Poke Bowls) beside The Apothecary coffee shop.

3.12. Furthermore, other vacancies are a consequence of the building being ‘Under Alteration’ and have since been completed such as The George in Rye, The Parlour beside, and the Clive Sawyer Gallery.

3.13. The most prominent vacancies are the two units at the corners of West Street and the vacant restaurant along the High Street.

Figure 3.2: Vacancies in Rye

Source: Experian Goad Category
Note: vacancies highlighted in orange

Out of Centre Retail

3.14. There is a Jempson’s Superstore located approximately 4 miles north west of Rye in Peasmarsh. The store opens from 7am to 7pm everyday with the exception of Sundays when it is closed. The superstore also has a pharmacy, a restaurant and there is a Jet petrol station adjacent.

Commercial Property Indicators

3.15. On the High Street rent is approximately £25 - £30 per sq ft and this drops to around £15 - £20 per sqft on Cinque Ports Street. Feedback from local agents indicate that the commercial market is generally very good in Rye, with the only exception being the Barclays buildings.

3.16. According to agents, the commercial rental market is very active and vacancies don’t tend to stay on the market for the very long. Rye is considered unique in that the majority of properties are owned and let by independents. The average yield for commercial property in Rye is around 6-6.5%.

Lambert Smith Hampton

Retailer Representation

3.17. Rye has a very limited major retailer representation with 'Boots' being the only major retailer present along the High Street.

3.18. As of November 2022 a review of published operator requirements identified 10 recorded requirements from retail and leisure operators since November 2021, the most relevant of which are listed below. Similar to Bexhill, several of the operators were exclusively seeking retail parks and therefore would not locate to a town centre location. The relevant list of operators seeking a town centre location in Rye includes:

Table 3.3: Retail Multiple Representation Rye – November 2022

Recorded Date	Operator	Operator Type	Goods Type	Size (sq m)	
				(Min)	(Max)
Mar-22	Lidl	Supermarket	Convenience	1,672	2,415
Feb-22	Travelodge	Hotel	Leisure	929	3,716
Nov-21	Premier Inn	Hotel	Leisure	1,858	
Apr-22	Grape Tree	Health Food Store	Leisure	116	
May-22	Between the Line	Gift Retailer	Comparison	79	120
Nov-22	Seasalt	Fashion retailer	Comparison	111	163
Dec-21	The Cornish Bakery	Cornish Pasties	F&B	46	278
Total Floorspace:				**4,686**	**6,294**

Source: therequirementlist.com

3.19. The requirement list identifies well known hotels and retail brands that would benefit Rye, particularly where there is opportunity to improve foodstore offer (via Lidl) and support the tourist economy through new hotel provision. Both Premier Inn and Travelodge are seeking a location in Rye, which would help support overnight trade in the centre. Seasalt, a quality high street fashion brand is typically located in towns popular with visitors, which further indicates the role of Rye as a visitor destination.

3.20. Between the Lines offers high quality gifts and lifestyle / wellbeing products and are actively seeking properties in Prime High Street Locations in affluent market towns and cities. They appear to have a clear identity which Rye fits into. Similarly, The Cornish Bakery was identified in the requirement list seeking premises in quality high streets / tourist attractions, and have now since opened in February 2022.

3.21. There were other operators seeking a location in Rye which are not listed, such as Toolstation. However, these retailers are often near other trade occupiers and offer good parking and loading facilities. As such, requirements are more focused on out of centre locations.

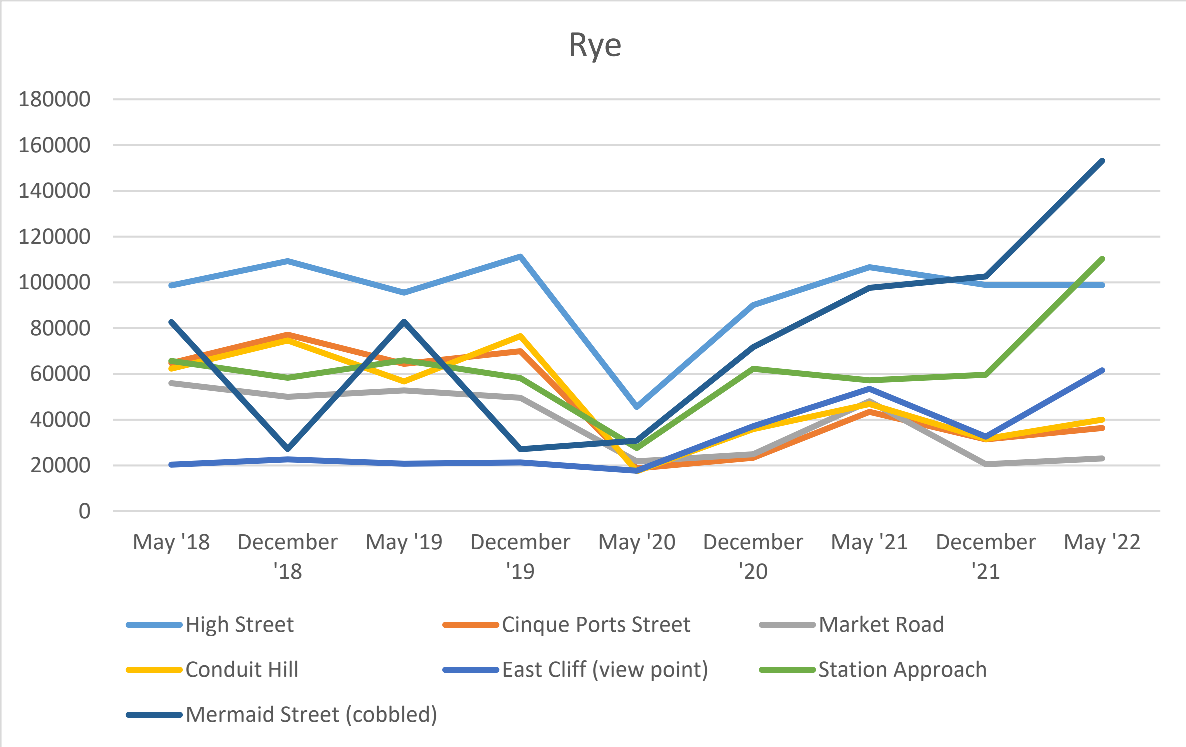
Pedestrian Flows

3.22. Footfall data has been gathered from Datscha, who collect data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

3.23. In total, seven locations were monitored across the town centre along the key streets. The figure below shows how footfall patterns have changed since 2018 capturing trends pre-pandemic, during and after national restrictions.

3.24. Figure 3.3 below shows that the High Street has the most footfall presence with all locations showing the predicable decline in footfall in the middle of 2020. Also of interest, is the levels of footfall on Mermaid Street which is a steep cobbled street.

Figure 3.3: Rye Footfall Counts Between May 2018 – May 2022



Source: Datshca

Accessibility

3.25. The town centre largely comprises of two parallel streets, Cinque Ports Street and High Street, the latter having the more dominant retail and service offer. The town centre has a one-way system and there are pedestrianised streets that run perpendicular between (and off) the two roads.

3.26. The town is located on a hill and is particularly steep in parts, and as a result is better accessed and traversed on foot rather than bicycle. The train station is located to the north of the town and upon exiting the station there is not a good sense of arrival. The signage does not clearly identity the town centre and is more associated to vehicle movement and directions.

3.27. There are old signs which state “cobbled streets” but these could be clearer. Bus stops are located along Station Approach leading towards the town centre, which presumably allow visitors to go to the wider attractions such as the High Weald AONB.

3.28. The main streets are relatively pedestrian friendly, newly led with tarmac, and offering disabled parking bays. The town is on a steep hill, and the old cobbled streets would be difficult to walk on if mobility impaired.

3.29. However, the historic importance of these streets is evident and the pedestrian flows above demonstrate that they have similar pedestrian traffic to other more “walkable” parts of the town. These cobbles streets are pedestrianised zones were no vehicle access is allowed, except for access and permit holders.

Market and Events

3.30. Rye Market opens every Thursday from 7am to 2pm and located in along Ropes Walk. The market is a 150-year-old tradition, has a wide variety of stalls and is easily accessible with free parking.

3.31. Rye also has a number of seasonal events such as guided ghost walks, an annual arts festival and bonfire celebrations.

Parking Provision

3.32. There are a lot of on street parking provided throughout the town via a RingGo service where a code can be used to pay on street parking via a mobile phone.

- Wish Street: 80 spaces: £2.20 for 2 hours
- The Strand: 34 spaces: £2.00 for 2 hours
- Rye Station: 63 spaces: £3.10 for 2 hours
- Cinque Ports Street: 30 spaces: £2.00 for hours

Crime and Safety

3.33. Incidences of crime reported to Sussex Police are recorded quarterly within information on reported crime dating back to July-September 2018. This 3-year period has seen a reduction in half of all crime reported.

3.34. The figure below identifies ‘Rye boundary and the hotspots for crime within, based on incidences of crime report in May 2022. The most commonly reported crimes reported are:

- Public Order 14
- Violence and sexual offences 12
- Anti-social behaviour 9
- Other theft 6

3.35. It is evident that the crime is focused around the Sainsbury’s area and along Park Road, the majority being violent behaviour.

3.36. The figure overleaf illustrates hot spots for crime in Rye Town Centre.

Figure 2.4: Crime Hot Spots in Rye Town Centre

Source: Police.co.uk

Town Centre Environmental Quality

3.37. The town is a designated Conservation Area and has architecture of significance importance. Although the Citadel itself it Medieval, a substantial amount of the buildings have been re-faced with Georgian and Victorians style architecture, typically with sliding sash timber windows with slender glazing bars of single glazing. There are also buildings which are Tudor in appearance.

3.38. Most of the buildings are in very good condition and are well preserved, and as a result is why the town has a large visitor / tourist economy. This also applies to the fenestration, road and pavements. Where there have been more modern alterations and signs of development, such as asphalt roads and footpaths, they are in very good condition.

3.39. Street furniture in the form of benches are available along the high street and were being used during the site visit. There is also a view point, gathering spot, at the top of East Cliff.

3.40. There are bollards throughout the town centre on hills and corner and areas where pedestrians may be more vulnerable.

3.41. The town centre has pockets of greenery, but not throughout. This largely comprises some residential front gardens, ivy growing up the front façade of buildings and some flower beds/pots. Although, the town doesn't appear to be overly 'hard' or urban due to the quality and architecture of the town, the narrower streets being such historical interest.

3.42. The town would not be considered cycle friendly giving the historical and spatial context, built on a hill, cobbled streets, narrow.

Barriers to Business

3.43. Many of the same barriers to business that affect towns across the country will apply to businesses in Rother. The main barriers to investment for new and existing businesses will predominantly relate to macro factors, such as uncertainty in the market generated from Brexit, COVID-19, now the cost of living crisis. This has led to many businesses putting expansion plans on hold and this applies equally to major brands as well as small businesses. The burden of business rates and the prominence of upwards only leases are also a key challenge for new businesses that are considering opening within a town centre unit.

3.44. For Rye, the town is performing strongly based on the good range of retail and F&B offer, while vacancies are below the national average (particularly when accounting for those that are listed as under alteration). As a consequence, demand for town centre units is strong and vacancies in stronger retail pitches are let quickly. This may limit opportunities for new businesses and for those seeking larger premises, there may be less opportunity to find larger units within their existing trading pitch.

3.45. We are also aware of pressures on commercial space from the conversion of commercial uses to residential uses. Feedback from one retailer on Lion Street highlighted that a number of F&B uses have been lost in the area to residential conversions which has reduced commercial activity.

Evening and night time economy

3.46. A total of 16 retailers were sampled in Rye which included food & beverage (F&B), comparison, convenience and services along the three main streets to find out the opening and closing times of the retail offer, and whether they are open are shut on Sundays. This help to identify the level of the evening, night time and weekend economy.

3.47. The majority of the retailers that stay open at night time are food and beverage retailers which also open on Sundays. Comparison retail opens between 09:00-10:00 and closes by 17:30. The convenience offer within the town is limited.

Table 2.4: Sample of Business Opening Hours in Rye

Retailer Name	Open	Close	Sunday	Type
Marinos fish bar	12:00	21:00	open	F&B
The Grapevine Champagne	12:00	01:00	open	F&B
The Fig	09:30	22:00	open	F&B
Apothecary Coffee House	09:00	17:00	open	F&B
Layla Mezze Grill	12:00	22:00	open	F&B
Lola and Sidney	11:00	17:00	open	Comparison
The Rye Bookshop	09:30	17:00	open	Comparison
Boots	09:00	17:30	closed	Comparison
Rye Health Store	09:00	17:00	closed	Comparison
Grammar School Records	10:00	17:30	open	Comparison
Ashbees 100	10:00	17:30	open	Comparison
Nationwide	09:00	16:30		Services
Rye Hair Design	09:30	17:00	closed	Services
Teddy's Barbers and Gents Grooming	variable	variable	closed	Services
Jempson's Rye	06:00	22:00	closed	Convenience
Costcutter	06:00	22:00	open	Convenience

Customer Perception of Rye Town Centre

3.48. A summary of the household telephone interview surveys conducted in February 2022 is set out in the paragraphs below, which highlights the key findings on the customer perception of Rye Town

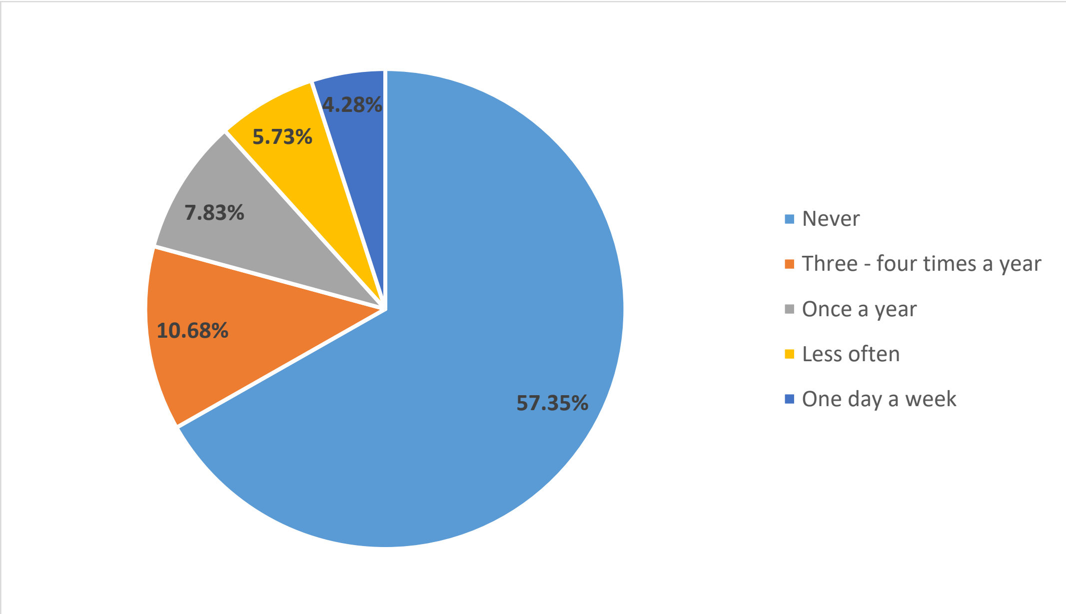
Centre. These questions focused on how frequently the respondents visited the town, what they like and dislike about the town and what improvements could be to encourage them to visit the town more often. The full results are contained in Volume D.

How often do you or your household visit Rye Town Centre for shopping?

3.49. The vast majority of respondents stated that they never go into Rye town centre for shopping 57.35% and almost 20% go in to Rye for shopping either once a year, or 3-4 times a year.

3.50. Figure 3.5 overleaf summarises these findings, which also show that only 4.28% of respondents go into Rye on a weekly basis for shopping.

Figure 3.5: Rye frequency of visit



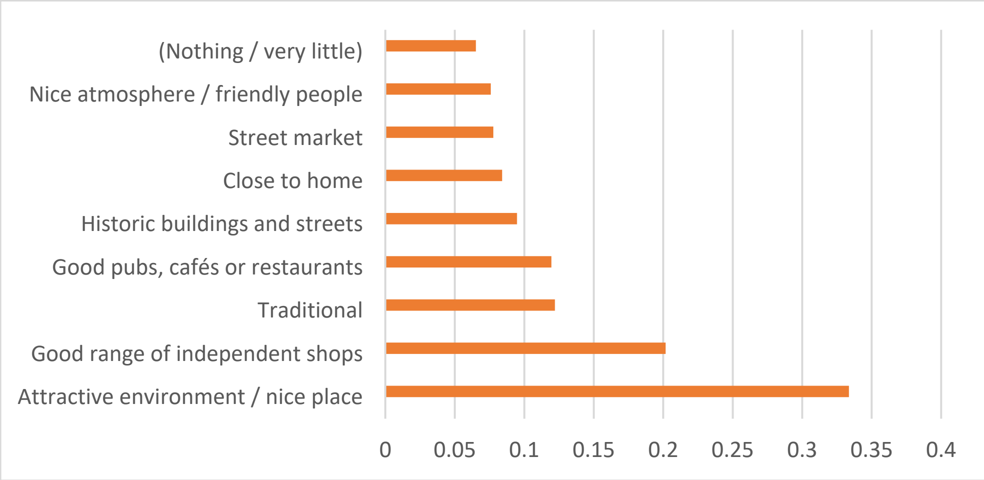
Source: Q29, HTIS, Volume D

What do you like about Rye Town Centre?

3.51. The most common responses largely related to the pleasant aesthetic of the built environment with 33.36% stating that Rye is attractive, 12.20% liking the traditional aspect, 9.48% the historic buildings and streets, and 6% liking the history of the town in general.

3.52. Some respondents mentioned the retail offer being the reason that they liked the town centre, such as the independent shops (20.17%), street market (7.78%) and good quality pubs and restaurants (11.95%).

Figure 3.6: What do you like about Rye



Source: Q30, HTIS, Volume D

What could be improved about Rye Town Centre that would make you visit more often?

3.53. The remaining questions for Rye town centre were in relation to what could be improved to the town centre, and what would encourage respondents to visit the town in the evening time. However, the responses showed that the majority of people stated that nothing could improve the town centre (60.86%) and that nothing would encourage them to visited during the evening (67.33%) or they did not know what could be improved (12.45%) or what would encourage them (10.57%). These responses confirm that the majority of respondents are content with the town centre.

Summary

3.54. In summary we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Rye below:

Strengths

- The town centre has a strong heritage offer in terms of its building architecture and street form, which makes Rye particularly unique and sets it apart from Bexhill and Battle.
- Rye's historic nature and proximity to the coast helps to supports a strong visitor economy that influences the range and quality of retail and food and beverage offer in the town centre.
- The centre's fisheries is an important local industry and a popular visitor activity.
- The town has a good range of quality retail provision with a number of popular brands trading in the town centre.
- A strong independent retail economy and a traditional weekly market that will appeal to residents and visitors.
- Good demand from retailers seeking space in the town centre, particularly from those seeking to target the visitor market, but also from food retail (Lidl).
- The town is located near Rye train station, which provides good connections to wider locations.
- Rye has a lower proportion of vacant retail units compared to the UK average.
- Demand for space is strong and local agents report a quick turnaround when units become vacant..

Weaknesses

- Although the tourist economy appears to be strong, trade is seasonal which can result in local businesses struggling during the off-season.
- Many shops in the core shopping area (i.e. High Street) are geared towards the visitor market. Whilst this is positive in supporting visitor trade, it may not meet the needs of the resident catchment.
- Pockets of deprivation with households having low income, and in turn this reflects the overall low wage of employment within Rye.
- No anchor retailers, particularly from the foodstore sector, which can help attract more regular visits into the town centre.
- The town is more expensive in terms of commercial rents compared to Bexhill and Battle, which may be a barrier to start-up businesses.
- Poor sense of arrival and signage from the train station, which could be improved.

Opportunities

- Draw more catchment residents to the town centre by supporting retail that meets their needs and encouraging more family orientated leisure activities.
- Support the provision of a new foodstore in or close to the town centre.
- Build on its independent offer, which helps to differentiate the town from its competitors.
- Promote the all year round town centre economy, or to invest in businesses that are not so seasonally reliant.

Threats

- The economic downturn due to cost of living and the cost of doing business, with impacts on supply chains.
- Permitted Development Rights could lead to a loss of occupied retail units in non-Listed Buildings as changes from shops to residential can occur outside of planning controls.
- Transport networks and traffic issues especially when the market is operating.
- Online shopping presents a large threat to the town centre and represents stronger competition than competing centres outside of the District for non-food goods in particular.

3.55. In summary, Rye Town Centre has a strong tourism led economy however this is considered seasonal, the town not performing as well during off peak months and suffering more from unemployment. The town lacks a main stream foodstore anchor which would help to draw more regular residential catchment expenditure including on Sundays which would help to support more opportunities for linked trade to other town centre businesses.

3.56. Vacancy levels are also slightly lower than the UK average and there are other outlets along the High Street that are currently under alternation. Vacancies have been reported to be occupied very quickly and local agents in the area confirmed that the commercial market is strong. However, Permitted Development Rights could also impact the town as this allows retail to come forward without the need to consider the sequential or impact test, drawing more people away from the town centre.

4.0 BATTLE TOWN CENTRE

4.1. Battle is a small historic market town with a population of approximately 5,200 people. It is the only town of the three that is located within the High Weald Area of Outstanding Natural Beauty (AONB) and due to its historic core, was designated a Conservation Area in 1971.

4.2. The town has a visual impact on the landscape with it being developed on one of the principle high Weald east-west ridge. The most prominent feature of the town is Abbey Gate House which leads to Battle Abbey, and is located towards the south east end of the high street.

4.3. The Battle Civil Parish Neighbourhood Plan (2021) and Policies Map identifies the Town Centre Boundary contains the Bexhill Town Centre map, illustrated below:

Figure 4.1: Battle Town Centre Boundary

Source: Battle Civil Parish Neighbourhood Plan

Diversity of Uses

4.4. The assessment of diversity of uses is informed by a survey of commercial floorspace undertaken in October 2021 and published by Experian Goad.

4.5. Table 4.1 overleaf shows that Battle has a total of 13,601 sqm of commercial town centre floorspace contained across 121 outlets, which is the lowest quantum of commercial floorspace of the three town centres.

Table 4.1: Battle Retail Composition by Outlets and Floorspace, 2021

	No. Outlets	% of Total Outlets		Gross Floorspace	% of Total Floorspace	
		Battle	UK Average		Battle	UK Average
Comparison Retail	35	28.93%	27.02%	3,279	24.11%	30.19%
Convenience Retail	15	12.40%	9.28%	2,518	18.51%	15.50%
Retail Services	23	19.01%	15.74%	1,468	10.79%	7.22%
Leisure Services	22	18.18%	25.02%	2,629	19.33%	25.93%
Financial & Business Service	11	9.09%	8.91%	1,254	9.22%	6.74%
Vacant	15	12.4%	13.8%	2,453	18.03%	13.82%
Total	121	100%	99.79%*	13,601	100%	99.40%*

Source: Goad Category Report October 2021

*note, the totals do not add up to 100% as they are not accounting for 'Other Retail'

4.6. The town has a good range of retail offer, with (35) comparison retail outlets, (23) retail services and (22) leisure service having the highest proportion of representation. Comparison retail is slightly above the national average, although the total floorspace is more than 5% below the national average. Convenience has approximately 3% more outlets and 3% more floorspace in Battle compared to the UK average.

4.7. The categories within each sector are evenly dispersed, except for retail services which has a total of 16 'health and beauty' outlets and equates to almost 70% of the total retail service offering.

4.8. Retail services representation in Battle is above the national average and approximately 3.5% more floorspace. The figures for financial and business services are relatively similar between Battle and the UK average.

4.9. Table 4.2 below shows the relevant classifications for leisure services. The leisure service sector offering is almost 7% below the UK average and has a substantially lower representation of fast food takeaways. This is not necessarily a negative however, as sometimes they can appear out of character, or do not cater to the local demographic. Cafes have the most leisure services representation with a total of 7 outlets. Battle has some important historic assets and would attract visitors, so it is surprising that there is only one Hotel/Guest House officially recorded Consequently, the town centre wouldn't appear to cater for overnight stays.

Table 4.2: Battle Leisure Services Composition Summary by Outlets and Floorspace

	No. Outlets	% of Total Outlets	
		Battle	UK Average
Bars & Wine Bars	1	0.83%	2.18%
Cafes	7	5.79%	4.93%
Hotels & Guest Houses	1	0.83%	0.87%
Fast Food & Takeaways	2	1.65%	6.01%
Public Houses	3	2.48%	2.61%
Restaurants	4	3.31%	4.77%
Sports & Leisure Facilities	2	1.65%	1.12%

Source: Goad Category Report October 2021

Vacancy Levels

4.10. Experian Goad identified 15 vacant units in total which is slightly below the national average and equates to 12.4%. The GOAD map below illustrates the how the vacancies are dispersed throughout the town centre.

Figure 4.2: Vacancies in Battle

Source: Experian Goad Category

Note: vacancies highlighted in orange

4.11. The site visit undertaken on the 12th July identified that some of these had been occupied, such as an architectural practice at the top of the High Street. The most prominent vacancies were located on the west side of the High Street, with several clusters of multiple vacant units, at the pedestrian crossing north of the Bull Ring and at the former George Hotel and the building adjacent. It should also be noted that some of these vacancies are due to the buildings being under alteration, such as the vacancies near the Bull Ring. Furthermore, it is also noted that subsequent to the site visit, some vacancies have now been occupied such as a wine bar (Thorpe's Bar), which now occupies the unit adjacent to Boots Chemist.

Retailer Representation

4.12. Battle also does not have a lot of multiple retailer outlets, and the majority of retailers are independent. This is typical of smaller market towns that have less appeal to national multiples and helps to support local businesses through more affordable commercial accommodation (where there

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is less competition for space with multiples) and provides a point of difference to retail offer available in Bexhill and Rye.

4.13. Retail is mainly aimed at supporting local residents' needs, but to the southern end of High Street and close to the Abbey where there is a notable mix of retail that is biased towards the visitor market.

4.14. Retail, leisure and service multiples that are currently trading in Battle are listed below:

Table 3.3: Retail Multiple Representation Battle

Convenience	Comparison	Services	F&B
Co-op	Boots	Nationwide	Costa Coffee
	Holland & Barrett		
	Age UK		

4.15. As of November 2022 a review of published operator requirements identified 4 recorded requirements from retail and leisure operators since November 2021, the most relevant of which are listed below:

Table 3.4: Retail Multiple Representation Battle – November 2022

Recorded Date	Operator	Operator Type	Goods Type	Size (sq m)	
				(Min)	(Max)
Apr-22	Grape Tree	Health Food Store	Leisure	116	
Mar-22	Lidl	Supermarket	Convenience	1,672	2,415
Jan-22	Aldi	Supermarket	Convenience	1,672	2,044
Total Floorspace:				**3,460**	**4,459**

Source: therequirementlist.com

4.16. The requirement list again identifies well known operators such as Lidl and Aldi who are seeking to locate into this area, but it also shows that there are not many operators in total who are seeking to locate in this town in general. This supports the idea that Battle is largely driven by a more independent market.

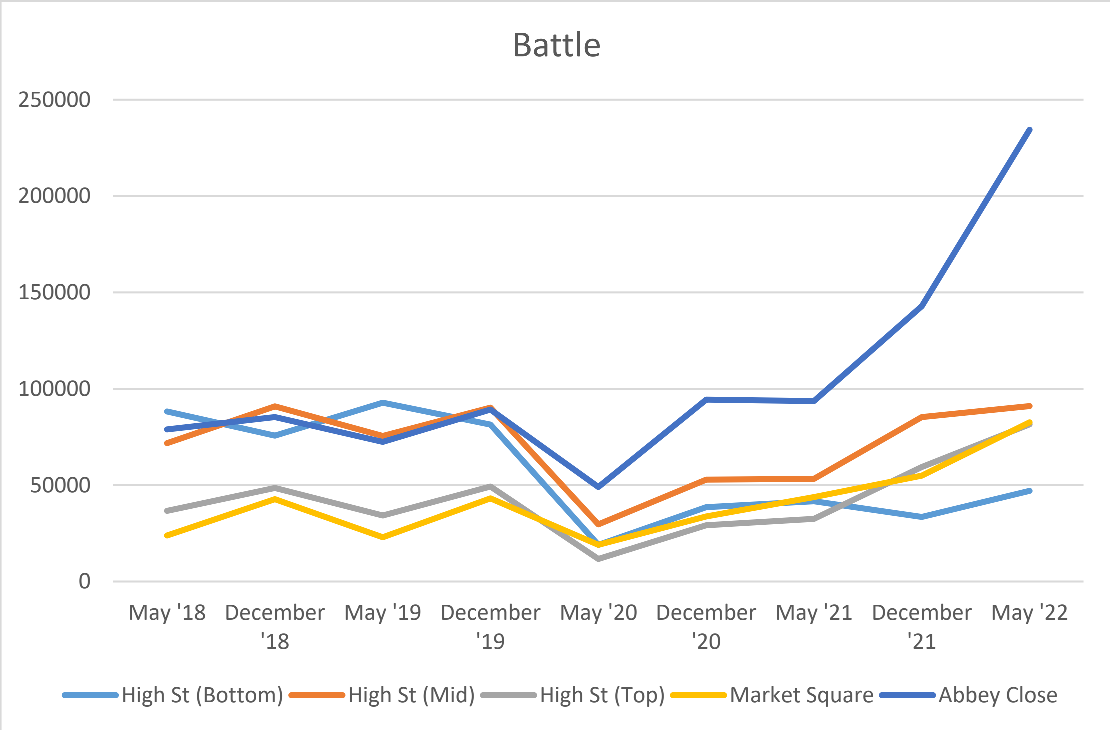
Pedestrian Flow

4.17. Footfall data has been gathered from Datscha, who collect data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

4.18. In total, seven locations were monitored across the town centre along the key streets. The figure below shows how footfall patterns have changed since 2018 capturing trends pre-pandemic, during and after national restrictions.

4.19. As the figure overleaf shows, Battle has a consistent footfall flow with the High Street levels declining expectedly during the pandemic. The pedestrian side street of Abbey Close saw a significant increase in footfall from May 2021.

Figure 4.3: Battle Footfall Counts Between May 2018 – May 2022



Source: Datscha

Accessibility

4.20. The town is accessible by train, although the Battle Railway Station is not located within the town centre, but approximately a 10-minute walk away. The walking route is not particularly pedestrian friendly in parts, however there is a pedestrian crossing upon leaving Station Approach which provides better walking access into the town from the opposite side of the road.

4.21. When leaving the station, the first visual scene is of a large health centre and a storage unit, which results in a sub-optimal sense of arrival when visiting the town by train.

4.22. The footpath is very raised, having to be stepped at parts and has metal barriers along the footpath on the latter half of Upper Lake, heading towards the town where the footpath is approximately 2m above road level. There didn't appear to be any speed restrictions although the high street is narrow and has on-street parking throughout, which acts as a traffic calming measure, and there weren't any noticeable issues with speeding. However, there are problems with traffic congestion, particularly in summer months.

4.23. The High Street itself has several pedestrian crossing and the footpaths are wide and in good condition.

Markets and Events

4.24. Battle Market takes place at Abbey Green, the Battle Memorial Hall, every Friday and also on the third Saturday of the month and sells local produce, home cooking and crafts. The market opens from 10am until 1pm.

4.25. Battle also hosts a month long Battle Festival during October which brings internationally acclaimed artists and musicians to the town. In November, Battle host a bonfire parade and the Battle Abbey itself runs throughout the year.

Parking Provision

4.26. Battle has on-street parking along the High Street and the main car parks in the town are:

- Battle Station: 247 spaces: £4.90 flat rate (£1.50 off peak)
- English Heritage: 160 spaces: £4.00 flat rate
- Mount Street: 209 spaces: £2.00 per hour
- Upper Market: 93 spaces £2.00 for 2 hours
- Lower Market: 78 spaces: £3.00 for 2 hours

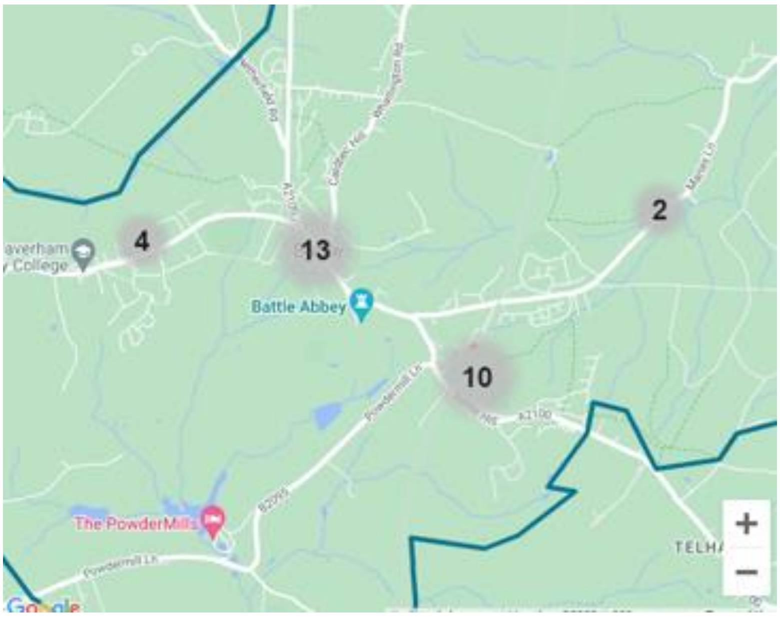
Crime and Safety

4.27. Incidences of crime reported to Sussex Police are recorded quarterly within information on reported crime dating back to July-September 2018. This 3 year period has seen a reduction in almost half of all crime reported.

4.28. The figure below identifies 'Battle Town and Netherfield' boundary and the hotspots for crime within, based on incidences of crime report in May 2022. 29 crimes were reported in this area, see overleaf, and the most commonly reported crimes reported are:

- Violence and sexual offences 9
- Other theft 4
- Anti-social behaviour 2
- All other crime 5

Figure 4.3: Crime Hotspots in Battle



Source: Police.co.uk

Town Centre Environmental Quality

4.29. Battle town centre has a key landmark with the Abbey Gatehouse located at the bottom of High Street. The town centre is located within the much larger conservation area, and the town is also within the High Weald AONB.

4.30. Many of the buildings are in good condition, and some are under alteration presumably to improve on the current condition of the building. Given the context of the town centre the windows are still single sash windows, particularly on the storeys above the ground floor level.

4.31. The buildings have apparent historic interest however the High Street itself is not as visually attractive compared to Rye. The High Street has a relatively busy road running through it, with steep stepped footpaths on one side. The pavement is in good condition and there did not appear to be any major obstacles however, after the initial on-street parking there is no buffer between the busy road and pedestrians and does not feel as safe to walk along.

4.32. The Bull Ring area is an aesthetically pleasant part of the town and there is opportunity to improve on this area. This also applies to the Market Square area, at the other end of the High Street, which appears empty and not very functional when there is no market.

4.33. Public seating is provided throughout, but focuses around the Bull Ring which were being used by people of all ages during the site visit.

4.34. There are some hard and soft barriers in the form of bollards and plant pots along key pedestrian areas, such as the crossing just to the north of the Bull Ring. There is very little greenery or landscaping throughout the High Street which results in the physical environment feeling rather hard. Although the buildings have historic interest, the street feels more functional than tourist-led, ostensibly aiming towards the local market more.

4.35. There is no infrastructure for cyclists and the vast majority of pedestrian infrastructure is in the form of footpaths along the road, although there are some pedestrian elements such as Old Ladies Court, Market Square and Abbey Close.

Barriers to Business

4.36. Key stakeholders were contacted who provided insight on the barriers to business in Battle using their local knowledge. One stakeholder mentioned that they were previously located on the High Street but moved to Market Square, where the rent is more affordable and as the building is not Grade II listed, there is more flexibility for their operations.

4.37. The buildings on Market Square also have higher floor to ceiling heights and larger windows which benefits retailers and operators. Interestingly, some stakeholders mentioned that they are benefiting from improved footfall into their stores at Market Square compared to the High Street.

4.38. The High Street was stated as being somewhat of a "*hostile environment*", with many people reporting (to the Chamber of Commerce) that the traffic and congestion on the road is overwhelming. Stakeholders consider that High Street is used as a thoroughfare and rather than encourage car-borne customers to stop and visit businesses. The A21 should be used to bypass the town, but the perception is that it also suffers from heavy congestion so traffic passes through the town to avoid the A21. It results in the High Street generating too much traffic, vehicle exhaust fumes, and creates a poor perception of road and pedestrian safety.

4.39. Another barrier highlighted by stakeholders related to parking charges, which are purportedly very expensive, particularly for shop owners/workers, who need to park all day, 6 days a week.

4.40. The Market Square area is considered not to be part of Battle by Councilors, and as a result the square is not cleaned. According to stakeholders, shop owners are taking on responsibility for cleaning. It was highlighted that Market Square also does not support a traditional market, with only a small (almost car boot sale type) market occurring there which sells books and toys.

4.41. When events in the town are held, which according to stakeholders are very successful, they are only focused at the Castle and a lack of wayfinding limits trade to the rest of the town. Shop owners in the area have created a Market Square Association to promote the area but stakeholders stated that they require support from the Council to achieve this.

4.42. Lastly, stakeholders were of the view that many shops are struggling due to high business rates to pay on top of rents, and staffing issues. Many question whether they are achieving value for money for business rates, in terms of funding services in their local authority.

Evening and Night Time Economy

4.43. Seventeen retailers were sampled in Battle which included food & beverage (F&B), comparison, convenience and services along the three main streets to find out the opening and closing times of the retail offer, and whether they are open are shut on Sundays. This allows for identifying the level of the evening, nigh time and weekend economy. Table 4.5 below highlights these retailers:

Table 4.5: Sample of Business Opening Hours in Bexhill-On-Sea

Retailer Name	open	close	Sunday	Type
Baby Latte	09:00	16:00	closed	F&B
Rustico Neapolitan	12:00	22:00	open	F&B
The Sweet Olive	12:00	21:00	open	F&B
Costa	07:00	17:00	open	F&B
Kings Head	12:00	22:00	open	F&B
Burton Restaurant	09:00	16:00	open	F&B
Dickiebird Homestore	10:00	17:00	closed	Comparison
Boots	09:00	18:00	closed	Comparison
COOK Battle	09:00	17:30	open	Comparison
The Loft	10:00	16:00	closed	Comparison
One Day	10:00	16:30	closed	Comparison
Flowers By Sasha	10:00	15:00	closed	Comparison
The Greener Grocers	09:00	17:00	closed	Convenience
Jempson's Local	07:00	20:00	closed	Convenience
Co-op	07:00	22:00	open	Convenience
House of Doodle	09:00	17:30	closed	Services
Treat AVEDA Hair & Beauty	09:00	17:00	closed	Services

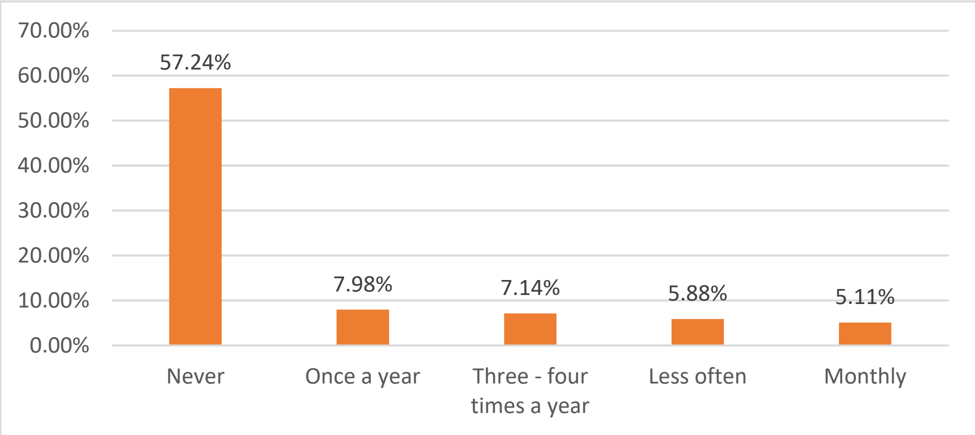
Customer Perception of Battle Town Centre

4.44. The viewpoints from customers visiting Battle Town Centre was obtained using household telephone interviews conducted during October 2021. These questions focused on how frequently the respondents visited the town, what they like and dislike about the town and what improvements could me to encourage them to visit the town more often. The full results are contained in Volume D.

How often do you or your household visit Battle Town Centre for shopping?

4.45. The overall responses for how often the respondents visited the centre for shopping shows that very few visited the town frequently. As the figure overleaf shows, almost 60% never went in to the town centre for shopping while around 15% of respondents visited the town centre with once a year or 2-3 times a year.

Figure 4.4: Battle frequency of visits



Source: Q33, HTIS, Volume D

What do you like about Battle Town Centre?

4.46. For those who visited the Battle Town Centre for shopping, a follow up question was asked in relation to what they liked about the centre. The majority of respondents stated that it was the attractive / nice environment (23.33%) while other responses said they liked the pubs and cafes (11.61%), the range of independent shop (19.68%) and the historic buildings and streets (13.03%). 10.01% of the respondents also stated that they liked nothing or very little about the town centre.

Figure 4.5: What do you like about Battle

Source: Q34, HTIS, Volume D

What could be improved about Battle Town Centre that would make you visit the town more often?

4.47. Similar to the other town centres, the survey respondents were given the opportunity to highlight how the town centre could be improved and what would encourage them to visit the town centre more often during the evening. Again, the vast majority of respondents either thought that nothing could improve the town centre, or encourages them to visit, or that they did not know of anything that could. This suggests that the respondents are largely content with the town centre. Other responses included having more or better parking and also having free parking car parking could encourage them to visit the town more often.

Summary

4.48. In summary we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Battle below:

Strengths

- Battle has some of the highest profile historic sites in the country with Battle Abbey, Battlefield and historic streets and buildings that help the local economy through tourism.
- The town is well connected with wider areas due to the train station and public transport network, although the station is not located in the town centre.
- Battle is located within the AONB and as a result is closely related to the more scenic and natural environments, which opens up opportunities to support a visitor market.
- The town centre is relatively compact and does not have too many vacancies, particularly if the buildings under alteration are not included.
- Strong local independent retailer market with only a handful of multiples in the town centre.

Weaknesses

- Generally, traffic management is a key issue for Battle, which the following points provide more detail on.
- The road through the town centre is very busy, is regularly congested, and there is a lack any suitable infrastructure for cyclists.
- Large lorries having to traverse through the town centre as well as traffic related to school runs exacerbate congestion and can bring the town to a standstill
- The poor wider road network results in most traffic having to flow through Battle.
- The busy road does not provide a pleasant pedestrian experience and unfortunately contributes to a more unattractive physical environment.
- Some empty shops and offices lead to perception of poor local economy.
- Poor digital infrastructure means that the town suffers from poor broadband services and mobile signal, which would hinder businesses.

Opportunities

- To promote and protect Battle’s cultural heritage which can help boost visitor numbers and in turn support town centre businesses.
- To make more of the Abbey Green area, as key focal point and gathering point for the town.
- To use the market square more for community benefit as it currently appears to be a large vacant area that serves little purpose.
- Investment in the public realm, the High Street could be more visually attractive and would benefit from soft landscaping to minimise the visual and environment impact of heavy traffic passing through.
- To have more available retail on Sundays which may encourage more to visit and spend in the town centre over the entire weekend.
- Further promotion of the heritage and cultural aspects of the town.

Threats

- Additional increase in traffic and congestion could impact on locals wanting to access the town centre and cause damage to the road infrastructure, with HGVs using the road, which is not suitable for them.
- Many businesses in the town centre will be reliant on visitor trade linked to the Abbey and Battlefield. As such, trade will be seasonal and so the town's economy will be vulnerable to economic shocks that impact on tourism numbers.
- Feedback from stakeholders indicate that the town centre is not meeting the needs of the younger resident population who are leaving the area for better work opportunities.
- As the smallest of the District's three towns, Battle is more susceptible to competition from Bexhill and towns outside of the District. The town is most at risk from existing retail multiples that may be seeking to consolidate their store portfolios and focus on higher order or stronger performing town centres.
- The introduction of use Class E could lead to the loss of the town's occupied retail and leisure units, which could have a significant impact on the town's ability to attract shoppers. This is some concern that certain personal service operators may proliferate street frontages (e.g. nail bars, tanning salons) which would affect the investment potential of the town centre, particularly the ability to attract better quality commercial operators.

4.49. Despite the pandemic Battle Town Centre appears to be relatively successful with a strong local economy and an emphasis on independent traders. Vacancies are slightly below the national average and there are some units under alteration which will presumable be occupied shortly after these works are complete. The town could still be under pressure from Permitted Development Rights and there is a growing problem with traffic and congestion within the town. The town does have some opportunity areas in the market square and Bull Ring and also benefits from tourism due to the historic importance of the Abbey and the surrounding area.