

FINAL DRAFT

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Contact: Chris Goddard / Duncan Mason

Tel: (020) 7911 2202 / 0202 7911 2711

Email: chris.goddard@gvagrimsley.co.uk / duncan.mason@gvagrimsley.co.uk

www.gvagrimsley.co.uk

+44 (0) 870 900 89 90

Signed For & On Behalf Of

GVA GRIMLEY

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CHRIS GODDARD

Date.....

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EXECUTIVE SUMMARY

1. Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
2. PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by, planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.
3. In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities should, having considered these factors, consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant when considering development proposals.
4. RPG9 seeks to support and enhance the vitality and viability of existing centres. Each local authority is encouraged to make existing centres more attractive, accessible and better able to attract investment. Similarly, guidance seeks to ensure improved access to jobs, services, leisure and cultural facilities in order to reduce dependency on longer distance movement, instead encouraging walking, cycling and public transport.
5. The Consultation South East Plan aims to provide a regional framework to 2026 and will supersede RPG9 when adopted. It promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Having regard to the Sussex coast local authorities are encouraged, amongst other things, to respond to the different needs, opportunities and characteristics of each town.
6. The East Sussex Structure Plan seeks to safeguard the vitality and viability of existing centres, in order to allow these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form.
7. The Lewes District Local Plan was adopted in 31st March 2003. The plan identifies the main centres within the District as Lewes, Newhaven, Peacehaven and Seaford. These centres are identified as providing an important central core, both economically and socially to these towns. Accordingly the retention of a sufficiently large and economic "critical mass" of town centre shopping and services is

- seen as important and the plan makes clear that these centres are to form the focus of future commercial development within the District. Whilst Newhaven, Peacehaven and Seaford are identified as primarily serving localised catchments the Council acknowledge that the trade draw of the numerous specialist operators is vital to Lewes.
8. The review of the Local Plan will now take the form of a Local Development Framework. The Local Development Scheme (LDS) for the District was agreed by the Secretary of State in February 2005, and the statement of community involvement is currently waiting approval. This represents the starting point of the formal review process, setting out the arrangements for the production of the Local Development Framework, the status of the policies and the timetable for their preparation.
 9. National retail trends indicate a slowdown in the growth of retail sales, compared to recent figures, but overall sustained growth of circa 4% is expected. In parallel, we anticipate a continued decline in the number of shops and a further shift of retail activity to fewer, larger centres. This pattern of polarisation applies both at the strategic level, where the growth of competing sub-regional centres pose a major challenge to the key centres within the District, and at the local level where sales are increasingly becoming focused into a network of large dominant foodstores.
 10. As a result many small towns are struggling to maintain their role, and retain and attract multiple retailers. As a consequence, many smaller towns are increasingly reliant on their convenience and services function, and independent rather than multiple retailers. However, this does provide opportunities for smaller towns to reinforce their distinctiveness and brand themselves accordingly.
 11. Demographic trends are working in the leisure market's favour, with growth in the youth population outstripping that of the UK adult population as a whole. There has also been a significant increase in the 'time-rich / cash-rich' 55-64 year old age group. However, work pressures and long working hours have had a direct effect on reducing leisure time for many age groups. For this growing 'cash rich / time poor' consumer group money is no longer as important as time, with many prepared to pay a premium for convenience.
 12. The South East comprises the largest tourism market in the UK outside Greater London, and East Sussex attracts a significant proportion of these visitors. The growth area in the domestic market is in day trips and short breaks, often based around cultural pursuits, heritage attractions or shopping. These trends present significant opportunities and challenges to the centres within the District.
 13. The centres of Brighton and Eastbourne are the dominant 'higher order' comparison shopping centres serving the District. It is evident that the smaller centres, such as Burgess Hill, Hailsham, Haywards Heath and Uckfield are also in competition, with Lewes.
 14. Currently only 33% of convenience retail expenditure is retained within the study area, whilst an even greater proportion of comparison expenditure is currently lost to destinations elsewhere. It is

apparent that the centres within the District are not able to meet all of the requirements of local residents.

15. Eastbourne and Brighton alone account for 49% of the comparison expenditure generated within the survey area as a whole. A significant proportion of trade is also lost to the smaller centres located on the peripheries of the District, namely Burgess Hill, Haywards Heath and Uckfield. The three centres account for 10% of the comparison goods expenditure generated within the study area.
16. In terms of ranking, shopping floorspace, retail offer, retailer requirements and future developments we expect the majority of competing centres to reinforce their market share in future years. Significant investment is anticipated in the Brighton, Eastbourne and Crawley, whilst many of the smaller centres in the sub region are considering further retail lead development schemes.
17. The polarisation of retail activity into fewer, larger centres within the sub-region and the potential for neighbouring centres to improve their offer is likely to reduce the market share of Lewes and the other centres within the District without measures to improve their offer. The main centres within the District of Lewes are located within the catchment areas of Brighton and Eastbourne which will continue to meet most of the 'higher order' comparison shopping needs of the District.
18. Lewes contains a mix of multiple convenience and comparison retailers, anchored by a somewhat dated Sainsbury store. Its main strengths are its attractive, historic environment and specialist/niche retailing. It has a low vacancy rate and improving demand, but is congested and with the exception of the Eastgate Centre, there are limited opportunities for any significant new retail development.
19. Newhaven has a limited retail offer and appears to be struggling to attract trade from outside its immediate catchment. The Sainsbury store is successfully serving a localised convenience function, but the rest of the centre appears to be underperforming and much of the comparison provision is low order. If the vitality and viability of the centre is to improve then it is apparent that it needs to attract more people from the local catchment and to capture more visitor spend.
20. There are two distinct areas of retailing activity within Peacehaven; The Meridian Centre and the South Coast Road. The Meridian Centre offers only a limited offer within a poor shopping environment, and appears to be struggling to attract trade. The South Coast Road provides an unappealing retail destination, dominated by through traffic and attracts only limited local, walk in trade. However, it does attract pass by trade and in this respect this centre appears to be trading successfully.
21. Seaford appears to trade successfully in the face of growing competition from Eastbourne. Its retail offer is underpinned by Sainsbury, and whilst the centre primarily serves a localised catchment, and has little potential for growth, it appears a viable, stable centre.
22. Of the £98.65 million of convenience expenditure retained within the District, the highest proportion, 41%, goes to stores within Lewes. The remaining 59% of expenditure is retained within the three

centres to the south, Peacehaven, Newhaven and Seaford. It is evident that Lewes and Seaford both benefit from having successful foodstores, which are able to attract local trade. However, the food stores in Newhaven and Peacehaven struggle to capture local trade, which has impacted upon the fortunes of both centres. It is important that each of the centres within the District is anchored by a strong foodstore, which is able to underpin each centres function.

23. Only 11.5% of the comparison goods expenditure generated within the study area is currently retained within the District, and it is evident that all four centres struggle, to varying degrees, to retain expenditure in the face of competition from higher order centres. As a result of its size and the range of goods and retailers within the centre, relative to the coastal towns to the south, Lewes attracts the greatest proportion of comparison goods expenditure within the District.
24. In Lewes, we have identified some limited capacity for additional convenience goods floorspace, as a consequence of the strong performance of Tesco. This would support the extension/redevelopment of the outdated Safeway store which anchors the town centre, provided such a development was able to compete effectively with Tesco in terms of size, convenience and parking.
25. Capacity for further comparison floorspace is limited. There is potential for new development to capture some of the forecast expenditure growth, and increase the centres market share within its affluent catchment. However, the main constraint is the shortage of large, modern, retail units in the town and limited new development opportunities.
26. There is no quantitative need for new convenience retail floorspace generally within Newhaven, and as such in order to strengthen the town centre the Council should resist any further expansion to the Sainsbury's store. It is evident that the Somerfield store is overtrading despite the restraints of the outdated unit, and there is scope to support the extension/redevelopment of this store. We consider there is unlikely to be any significant capacity for further comparison retail floorspace in the centre.
27. Within Peacehaven the majority of convenience goods floorspace is under performing and as such we do not anticipate that there will be any quantitative capacity for additional convenience floorspace within the centre during the lifetime of the Local Development framework. However, if the Meridian Centre is to provide the range of functions required to meet the needs of the local community then there is a requirement for an improved foodstore offer which could be supported based on the potential to increase the centres low market shares.
28. Convenience retailing in Seaford is anchored by the Safeway store, which is currently trading close to capacity. There is only very limited expenditure capacity for new floorspace within Seaford generally, however given that the store is currently overtrading there is likely to be a qualitative need for improvements to the store in forthcoming years. There is likely to be limited capacity in quantitative terms for significant new comparison retail development within Seaford through to 2021.

29. The leisure provision within the four centres is predominately focused around bars, pubs and restaurants, much of which, outside Lewes, is focused on the lower end of the market. It is evident from the survey that the majority of residents are dependent on Brighton and Eastbourne for trips to the cinema and the theatre, and to a lesser extent bars and nightclubs.
30. Relative to their function, we consider that each centre has a relatively healthy representation of restaurants, especially Lewes and Seaford. Notwithstanding this, a need exists for improvement in the facilities available in each centre. New eating and drinking facilities, especially high order facilities or those orientated towards visitors, should be encouraged in each centre in order to help attract additional people into these centres and to stimulate the evening economy.
31. We consider that capacity exists within the study area for further health and fitness facilities. Population growth is likely to compound the need and whilst this should improve usage in the Council run leisure centres, the development of a private, mainstream, health and fitness facilities within the District would enhance further its appeal.
32. The cinema market is dominated by Brighton and Eastbourne, although there would be merit in exploring further the scope for a small scale art house cinema in Lewes in order to compliment the centres existing provision and to diversify further the centre's appeal.
33. It is evident that a high proportion of those living in the District visit the theatre. Most use the facilities in Brighton, Eastbourne and the West End. However, the presence of Glyndbourne, and more modest local facilities in Lewes and Seaford are important cultural attractions which reinforce the role of these centres.

POLICY RECOMMENDATIONS

LEWES

34. Lewes should be promoted as the main focus for retail and leisure activity within the District. We do not anticipate any major expansion of its current role. However, in order to maintain its position in the hierarchy, and continue to meet mainstream shopping needs, the centre needs an improved main food anchor, and to provide modern units to meet retailer requirements.
35. In addition to meeting the needs for improved retail provision within the centre, the core strategy should seek to direct new investment into the town centre in order to maintain and enhance the centre's role as the District's principle leisure, cultural and visitor destination. This should aim to reinforce the centre's distinctive character and enhance the eclectic mix of specialist/ niche retailer and service operators.

36. As the centres prime focus, The Friars should be acknowledged as the Primary Retail Frontage along with the complimentary frontages along Cliffe High Street, to the east. The High Street provides a more diverse range of uses and as such the frontages stretching up School Hill to the castle should be acknowledged as secondary. Policy for secondary frontages should not undermine the prime areas of retail activity located along the High Street, as currently identified, but should allow for a more diverse range of uses ensuring a flexible approach that will help keep these units occupied and promote vitality within the peripheral areas.
37. The Eastgate Centre offers the potential to accommodate retail and leisure development. Any such development would provide an opportunity to improve the existing foodstore, enhance the frontages onto The Friars and to better utilise the Eastgate Car Park. Accordingly, we recommend that the Eastgate Centre should be identified as an opportunity site within the LDF, and should be the subject of supplementary planning guidance to ensure that any development proposals maximise the sites potential.
38. Should a development opportunity come forward on the fringes of the centre then there may be scope for extending the town centre within the LDF. It is essential that such a development is well integrated with the town centre and focuses activity towards the existing primary frontages.
39. Any proposals for development on sites outside the town centre, should be subject to a criteria based policy which requires the applicant to demonstrate a need for the proposal; that there are no sequentially preferable sites within town centres or district centres, that there would be no impact on the vitality or viability of the centres; and that the proposal is accessible by a choice of means of travel.
40. It is evident that the centre struggles from limited parking provision and this issue is compounded further by visitors to the centre. Given the importance of visitors to the town's economy, parking provision will be central to any future strategy to enhance the attraction of Lewes Town Centre, and the Council needs to continue to review the management, operation and pricing of existing parking and explore the opportunities for further provision in new developments.
41. In addition to the spatial strategy to be provided through the planning framework the Council should seek to actively promote the strengths of Lewes in order to enhance it's appeal as a visitor destination. A key element of this should be a co-ordinated branding strategy for the town centre in order to develop and market Lewes' local identity. Such a strategy should focus on the town's strong historic associations, architectural richness, distinctive character and cultural attractions.

NEWHAVEN

42. Newhaven primarily serves a local convenience shopping and services function. It struggles to capture expenditure from outside the town, and in retail terms we do not consider that Newhaven will again re-establish itself as a prominent destination within the District.

43. On this basis, we consider that the centre should be reclassified within the retail hierarchy as a District centre. Newhaven has an important role to play in meeting the needs of the local community. There is limited scope for any significant additional retail floorspace in the centre, but the core strategy should aim to enhance the existing main food anchor, and to enhance the centres wider appeal as a visitor centre and reinforce it's local function.
44. Retail activity within Newhaven Town Centre is primarily focused on Newhaven Square and the High Street. The primary shopping area as identified within the Local Plan, should be upheld within the LDF as the primary retail frontage. This will encourage retailers moving to the town to locate in this area, which will help underpin retailer provision generally within the centre.
45. Currently the Somerfield unit in Newhaven Square is trading very strongly and as such is successfully anchoring the centre. The owners of the precinct have previously proposed to re-configure the existing Somerfield Store, reduce the number of car park spaces in the adjacent multi-storey car park and provide two new 5,000 sq. ft. retail units.
46. The enhancement of this site would significantly improve the town centre environment, potentially opening the centre up to the surrounding area, providing improved access and egress and an improved anchor for the centre. Importantly improved foodstore provision would help strengthen the centres convenience function and potentially provide accommodation for some of the other prominent national retailers currently with requirements to locate in the centre.
47. Residential accommodation has the potential to reinforce the vitality and viability of the centre. Within the LDF the Council should explore the potential for encouraging residential development throughout the town centre.
48. To compliment the spatial framework to be provided through the LDF, a tourist/visitor strategy should be developed that promotes the key attributes of the town, namely the marina, the fort and the beach. The promotion of these facilities and the development of a distinct identify for Newhaven will provide benefits for the centre if current links through the town can be enhanced.

PEACEHAVEN

49. The two centres within Peacehaven both serve different roles and draw trade from different catchments. There are no physical links between the two areas and consequently few visitors link trips between the two. As such it is appropriate that within the LDF both "The Meridian Centre" and "The South Coast Road" should continue to be defined as separate centres.
50. Neither of the two centres within Peacehaven functions as a town centre in terms of PPS6. The Meridian Centre has the characteristics of a District centre, as defined within PPS6, and should be reclassified within the local retail hierarchy in recognition of this. However, the centre provides an

important function as the hub of the local community and as such it is considered that this should be the main focus of new retail/leisure and other town centre uses.

51. Within Peacehaven there are only two identifiable development opportunities, both adjacent to the Meridian Centre; the associated car parking that surrounds the centre and the industrial units to the east. Accordingly the Council should identify the Meridian Centre as a development opportunity, allowing for either the enhancement of the centre or wider redevelopment.
52. Within the Meridian Centre retail activity is already consolidated within the physical limitations of the building. As such the LDF should identify the centre as primary shopping areas. The Centre boundary should be drawn so as to include the adjacent community uses including the Doctor's Surgery of Meridian Way, the library, the Council Offices and the Meridian Leisure Centre.
53. The South Coast Road is made up of a range of retail and service uses, it is not anchored by any one unit, nor does it provide a significant function for local residents. It still serves an important function and successfully manages to retain passing trade within the centre. However, we consider it may be more appropriately defined within the LDF as a local centre. This will continue to allow commercial uses to locate in this area whilst affording the Council the flexibility required to consider the range of uses promoted within the centre.
54. Given the dispersed nature of commercial activity within The South Coast Road, the definition of the key retailing frontages serves little function. Instead policy within the LDF should make clear that within the boundaries of the centre commercial uses, comprising A1,A2,A3,A4,A5,D1 and D2 will be appropriate provided they are of an appropriate scale to the function of the local centre, and would complement and enhance the Meridian Centre as the main district centre of Peacehaven.
55. Development outside either of these centres should be subject to a criteria based policy requiring the key tests of PPS6 to be addressed, as recommended above in relation to Lewes and Newhaven.

SEAFORD

56. Seaford Town Centre successfully serves it's local catchment in the face of growing competition from Eastbourne. It is evident from the wide range of goods and services provided that the town is relatively self-sufficient.
57. Seaford is a viable and vibrant centre that serves all the functions of a town centre as defined in PPS6. In order to reinforce the vitality and viability of the centre the LDF should aim to consolidate existing provision, whilst building on the centres existing strengths to help increase market share. Retail uses should be encouraged towards the primary shopping area, whilst policy should allow for a more diverse range of uses beyond this to help generate vitality towards the peripheral areas.

58. As acknowledged by the Council development opportunities within Seaford are extremely limited. As such no sites have been identified within this study. Given the limited capacity within the centre, it is not anticipated that large scale development sites will be required in the life time of the LDF. Accordingly policy should continue to place emphasis on filling vacancies and extended existing shop units within the centre
59. Safeway is trading extremely well and anchors the centre's convenience function. Whilst the study concluded that quantitative capacity is currently limited a qualitative need exists for enhancements to the store to ensure that it continues to meet local needs. Policy within the LDF should encourage enhancements to the store and should any proposals to extend the store come forward, the Council should have regard to the wider benefits this may provide for the centre.
60. Seaford does not fully exploit it's potential as a visitor attraction. The spatial framework provided through the LDF needs to be complemented by wider Council initiatives aimed at successfully branding the centre and attracting more visitors. Whilst Seaford lacks the specialist provision of Lewes, it has a vibrant local community and as such the local identify of the town should be actively promoted, potentially through series of themed events.

1. INTRODUCTION

- 1.1 GVA Grimley was appointed by Lewes District Council in December 2004 to prepare a retail and leisure study for the District to enable a review of the policies, proposals and approach of the adopted Lewes District Local Plan.

PURPOSE

- 1.2 The purpose of the independent study is to guide and inform retail and leisure planning in the District, to provide a technical basis for preparing the Local Development Framework and to provide a sound and objective basis upon which to assess retail and leisure planning applications.

- 1.3 Lewes District Council's requirements for the study include:

- An assessment of each centre's expected economic growth, or decline, and expenditure patterns;
- An assessment of the overall need for additional retail and leisure floorspace, along with other key town centre uses, for each centre within the District, having regard to both qualitative and quantitative factors and the ongoing vitality and viability of each centre;
- The identification of deficiencies or gaps in retail and leisure provision within each town;
- An assessment of the capacity of the existing centres to accommodate new development, including consideration of the requirement to extend or consolidate existing centres;
- An assessment of the accessibility of the town centres both by private car and alternative modes of transport and the subsequent economic implications;

STRUCTURE

- 1.4 In order to meet the requirements of the brief, our methodology incorporates a comprehensive up-to-date review of retailing and leisure needs and how best these can be addressed within the planning policy context. To ensure the assessment is appropriately informed we draw on a household telephone survey, town centre health checks, a review of competing retail and leisure provision, retail and leisure capacity assessments and a review of potential development opportunities.

- 1.5 Section 2 of this assessment sets out the policy framework within which the existing development plan should be assessed and within which the Local Development Framework must be progressed. Accordingly this section highlights key policy objectives, the pertinent aspects of national planning guidance and the aspirations of regional guidance. Building on this, section 3 considers the

provisions of the existing Development Plan and the objectives of the emerging Local Development Framework.

- 1.6 In section 4 we consider recent trends in retail and leisure provision and the connotations of these on provision within the District's key centres. We review the sub-regional context in section 5, focusing in particular on the District's role within the wider hinterland, the attraction of competing centres and the resulting influence of rival destinations.
- 1.7 Having reviewed the attraction of competing centres, Lewes, Newhaven, Peacehaven and Seaford, are considered in section 6, having regard to the wider trends, the provision of retail and leisure facilities, the merits of the wider environment and each centres overall vitality and viability.
- 1.8 The scope for additional retail development is reviewed at section 7. The quantitative capacity exercise draws on the household telephone survey to understand the current usage of the main shopping and leisure destinations in the District and the future needs of the District's residents. Section 8 focuses on the range and choice of existing leisure provision in the District, and outlines our findings in relation to the capacity for additional leisure development.
- 1.9 Bringing together the results of the analysis, we set out our conclusions and subsequent recommendations for retail and leisure development in section 9.

2. PLANNING POLICY FRAMEWORK

- 2.1 In this section, we consider the central themes of planning policy and the resulting framework within which development plans and planning applications are progressed, highlighting the pertinent objectives of national and regional guidance.

DELIVERING SUSTAINABLE DEVELOPMENT

- 2.2 The Government is continuing to take forward a major programme of reform to the planning system to support its drive to create sustainable communities, promote sustainable development and achieve a better balance of housing supply and demand.
- 2.3 The Planning and Compulsory Purchase Act came into force on 28th September 2004. The Act sets a statutory objective for development plans to contribute to the achievement of sustainable development, placing sustainability objectives at the heart of the planning system.
- 2.4 Planning Policy Statement (PPS) 1; Delivering Sustainable Development, issued in February 2005, sets out the overarching planning policies on the delivery of sustainable development through the planning system. The guidance confirms that sustainable development is the core principle underpinning planning, clarifying that at the heart of sustainable development is the simple idea of ensuring a better quality of life for everyone now and for future generations.
- 2.5 The Government makes clear that planning should facilitate and promote sustainable and inclusive patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community. In promoting sustainable development, the Government reaffirms through the guidance that, amongst other things, the planning system needs to:
- Recognise that economic development can deliver environmental and social benefits;
 - Make suitable land available for development in line with economic, social and environmental objectives - ensuring that suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure development, so that the economy can prosper;
 - Promote urban and rural regeneration to improve the well being of communities, improve facilities, promote high quality and safe development and create new opportunities for the people living in those communities. Promote mixed use developments for locations that allow the creation of linkages between different uses and can thereby create more vibrant places;
 - Provide improved access for all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is located where everyone

can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car, while recognising that this may be more difficult in rural areas;

- Promote the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings. Bring vacant and underused previously developed land and buildings back into beneficial use to achieve the targets the Government has set for development on previously developed land.

2.6 Whilst PPS1 sets the key objectives for the planning system, the guidance does not replace or override other national policies and should be read in conjunction with other statements of national planning policy.

PPS6: PLANNING FOR TOWN CENTRES, MARCH 2005.

2.7 PPS6 was issued in March 2005 and supersedes the previous guidance contained in PPG6, Town Centre and Retail Development. The central message of the guidance is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development.

2.8 The previous guidance (PPG6) had four objectives, with equal weighting attached to promoting/sustaining town centres and promoting a range and choice of retailing and innovation. PPS6 shifts this emphasis, with the focus firmly on protecting/sustaining town centres, making it clear that the Government's key objectives for town centres are to promote their vitality and viability by:

- Planning for the growth and development of existing centres; and
- Promoting and enhancing existing centre, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible by all.

2.9 For the purposes of the guidance, city, town and district centres are all classed as town centres. In defining types of centre and their main characteristics the guidance recognises that town centres will normally be the principal centre or centres in a local authority's area. The guidance makes clear that in rural areas they are likely to function as important service centres, providing a range of facilities and services. District centres are defined as usually comprising groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. Small parades of shops of purely neighbourhood significance are not regarded as centres in policy terms.

2.10 The statement makes clear that, in addition to retail uses, town centre policy relates to a number of additional uses, including leisure, entertainment, recreational, office and cultural and tourism uses. The guidance also makes it clear that other, wider, Government policy objectives remain relevant,

including the promotion of social inclusion, regeneration of deprived area, promoting economic growth; sustainable patterns of development, transport choices and high quality and inclusive design.

2.11 The guidance encourages Local Planning Authorities to actively plan for growth and change in town centres over the period of their development plan documents by:

- Selecting appropriate existing centres to accommodate the identified need for growth by:
 - Making better use of existing land and buildings, including where appropriate, redevelopment;
 - Where necessary, extending the centre.
- Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.

2.12 In promoting and enhancing existing centres, regional planning bodies and local planning authorities are encouraged to consider the relevant network of centres and their relationship in the hierarchy. At both regional and local level, authorities are encouraged to consider whether there is any need to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level.

2.13 Where existing centres are in decline, local planning authorities are advised to assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities are encouraged to recognise that such centres may need to be reclassified at a lower level within the hierarchy of centres, and reflect this revised status in the policies applied to the area. The guidance makes clear that this may include allowing retail uses to change to other uses.

2.14 In selecting sites for development, PPS6 requires local planning authorities to:

- a) Assess the need for development – in assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure development. However, local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and where there will be clear and

demonstrable benefits in identifying sites for appropriate development to serve communities in these areas, additional weight should be given to meeting these qualitative considerations.

- b) Identifying the appropriate scale of development – in selecting suitable sites for development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment. The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and compliments its role and function.
- c) Applying the sequential approach to site selection – the sequential approach requires that locations are considered in the following order:
- First, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan document period, taking account of an appropriate scale of development in relation to the role and function of the centre;
 - Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre;
 - Out-of-centre sites, with preference given to sites which are or will be served by choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.
- d) Assess impact – making additional sites available for development may have both positive and negative impacts on existing centres. Positive benefits are likely to be stronger so where additional development takes place in the centre, or by an expansion of the centre, followed by edge-of-centre sites where a development would be well connected to the centre and result in a significant number of link trips and claw back expenditure. Where it is proposed that a site is to be allocated in an edge-of-centre or out-of-centre location, local authorities should assess the impact that the potential development of the site would have on centres within the catchment. Where the potential development of the site or sites proposed to be allocated in a centre would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed.
- e) Ensure locations are accessible – the Government is seeking to reduce the need to travel, to increase the use of public transport, walking and cycling and reduce the reliance on the private car, to facilitate multi purpose journeys and to ensure that everyone has access to a range of facilities. Jobs, shopping, leisure and tourist facilities and a wide range of services should be located in town centres wherever possible and appropriate, taking full advantage of accessibility by public transport.

- 2.15 PPS6 clarifies that the “centre” for a retail development constitutes the primary shopping area whilst for all other main town centre uses the “centre” should be regarded as the area embraced by the town centre boundary. PPS6 defines the primary shopping area as the area where retail development is concentrated, generally comprising primary and secondary shopping frontages, which are contiguous and closely related to the primary shopping frontage. Primary frontages are defined as the frontages that are likely to include a high proportion of retail uses and secondary frontages are defined as those that provide greater opportunities for a diversity of uses.
- 2.16 The guidance defines town centres as including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. For retail purposes edge of centre sites are, generally, considered to be those outside the primary shopping area, but within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses edge of centre is likely to be within 200 metres of a town centre boundary.
- 2.17 Notwithstanding this, in determining whether a site falls within the definition of edge-of-centre PPS6 advises that planning authorities should take account of local circumstances, such as barriers to pedestrian movement, such as crossing major roads or car parks and the attractiveness and perceived safety of the route. The Council should not consider that a site is well connected to the centre where it is physically separated from it by a barrier such as major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
- 2.18 PPS6 makes clear that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the needs identified, for at least the first five years from the adoption of their development plan documents, although it does acknowledge that for larger schemes a longer period may be appropriate to allow for site assembly. Local Planning Authorities are encouraged, where necessary, to consider the scope for site assembly using their compulsory purchase powers, to ensure that suitable sites within or on the edge-of-centres are brought forward for development.
- 2.19 In assessing proposed developments, PPS6 confirms that the key considerations are the same as those for allocating sites in development plan documents, as outlined above.

PPG13: TRANSPORT, MARCH 2001

- 2.20 PPG13 reaffirms the Government’s policy position towards retail development, as outlined in PPG6 and draft PPS6. In particular, paragraph 35 of the guidance endorses the need to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. Furthermore, it reaffirms the Government’s requirements for retail development to adopt a sequential approach, with preference given to town centre sites, followed by

edge of centre and, only then, out of centre sites in locations which are (or will be) well served by public transport.

- 2.21 PPG13 notes that if there is clearly an established need for such development and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out of centre developments, provided that improvements to public transport can be negotiated. PPG13 requires that development plans set maximum levels for parking. The guidance makes clear that there should be no minimum standards for development, other than for parking for the disabled.

REGIONAL PLANNING GUIDANCE FOR THE SOUTH EAST (MARCH 2001)

- 2.22 Until it is superseded by the Draft South East Plan, RPG9 sets out the most up to date regional guidance for the South East, providing a framework through to 2016.
- 2.23 The primary purpose of the guidance is to provide a regional framework for the preparation of local authority development plans. As such, in accordance with national guidance, the guidance encourages each local authority to make existing centres more attractive, accessible and better able to attract investment to ensure urban areas become the focus for development. Similarly, guidance seeks to ensure improved access to jobs, services, leisure and cultural facilities in order to reduce dependency on longer distance movement, encouraging walking, cycling and public transport.
- 2.24 The Guidance seeks to support and enhance the vitality and viability of existing centres, and highlights the need to incorporate mechanisms to revive town centres, support urban renaissance, promote social inclusion and encourage more sustainable patterns of development. In terms of the core strategy for the region the guidance recognises that whilst the south east is generally affluent, it does not enjoy a uniformly prosperous economy, highlighting that there remain some substantial areas of deprivation. A number of such areas are identified within the guidance as Priority Area for Regeneration, including the Sussex coastal towns from Shoreham to Hastings, which covers much of the southern end of the District of Lewes. Within such areas the guidance advises that, amongst other initiatives, local authorities should maximise the economic potential of tourism, arts, cultural and media activities;

CONSULTATION DRAFT SOUTH EAST PLAN

- 2.25 The South East Plan is a new type of plan, stemming from the 2004 Planning and Compulsory Purchase Act. Once adopted it will provide the statutory regional framework for development in the south east through to 2026, setting out scale, priorities and broad locations for change.
- 2.26 Similarly to the current guidance the draft plan promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Accordingly

town centres are promoted as the focal point for the development of a mixture of uses to include leisure, services, retail, residential and commercial.

- 2.27 The guidance highlights that the 'Sussex Coast' sub region contains a large number of challenges to future development, highlighting that whilst the built environment has areas of heritage and cultural importance a large percentage of the housing stock is old and physical decay is evident in some towns. As such local authorities are encouraged, amongst other things, to respond to the different need, opportunities and characteristics of each town, or group of towns, and all sections of their communities to help bring up the performance of the sub regional economy.

SUMMARY

- 2.28 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
- 2.29 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by, planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.
- 2.30 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities should, having considered these factors, consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant when considering development proposals.
- 2.31 RPG9 seeks to support and enhance the vitality and viability of existing centres. Each local authority is encouraged to make existing centres more attractive, accessible and better able to attract investment. Similarly, guidance seeks to ensure improved access to jobs, services, leisure and cultural facilities in order to reduce dependency on longer distance movement, instead encouraging walking, cycling and public transport.
- 2.32 The Consultation South East Plan aims to provide a regional framework to 2026 and will supersede RPG9 when adopted. It promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Having regard to the "Sussex Coast" sub

region local authorities are encouraged, amongst other things, to respond to the different needs, opportunities and characteristics of each town.

3. THE DEVELOPMENT PLAN

- 3.1 In non-unitary authorities the Statutory Development Plan has traditionally comprised the Structure Plan, prepared by the County Council and the Local Plan, prepared by the respective local authority.

EAST SUSSEX STRUCTURE PLAN; 1999

- 3.2 The replacement structure plan for East Sussex and Brighton was adopted in December 1999 to guide future development within the County over the period to 2011.
- 3.3 In terms of town centres, the main aims of the Structure Plan are to safeguard the vitality and viability of existing centres, allow these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form. Within the County, Brighton is identified as a regional shopping centre, whilst Eastbourne and Hastings are promoted as sub-regional retail destinations.
- 3.4 When drafted it was anticipated that the requirement for new retail development during the plan period would be relatively modest, especially with regard to convenience goods floorspace. In light of the modest requirements, a cautious approach was adopted towards new developments.
- 3.5 Having regard to leisure and tourism development the Structure Plan generally supports the maintenance and provision of such facilities, in keeping with the plans overall aim to provide for increasing leisure needs.

LEWES DISTRICT LOCAL PLAN

- 3.6 The Lewes District Local Plan was adopted in 31st March 2003 and therefore represents a relatively up-to-date detailed policy framework for the District. The plan is divided into two key sections, the "District Wide Policies", covering issues such as environmental principles, residential development and economic activities, and "Town Specific Issues". In accordance with the key objectives of planning policy the Plan seeks to promote sustainable development which meet the needs of the present generation without comprising the ability of future generations to meet their own needs.
- 3.7 The plan identifies the main centres within the District as Lewes, Newhaven, Peacehaven and Seaford. These centres are identified as providing an important central core, both economically and socially to these towns. Accordingly the retention of a sufficiently large and economic "critical mass" of town centre shopping and services is seen as important and the plan makes clear that these centres are to form the focus of future commercial development within the District.
- 3.8 Policy E3 makes it clear that when considering planning applications the Council will give priority to increasing the vitality and viability of town centres. Within town centres, the policy supports the

introduction of uses which will maintain or increase the usage of centre functions including, shopping, financial services, leisure, cultural and community activities, entertainment, health services, education, public service offices and food and drink.

3.9 The Council's policy aims to sustain and enhance the vitality and viability of the centres within the District. In this respect, policies E6 and E7 make it clear that retail development will only be permitted outside existing centres where:

- There are no suitable sites within the town centre;
- There would be no adverse impact upon the vitality and viability of existing town centres;
- The proposal will meet a qualitative and quantitative need; and
- The proposal is accessible by a choice of means of transport.

3.10 The respective site specific policies and proposals for Lewes, Newhaven, Peacehaven and Seaford, covered in the latter sections of the plan are summarised below.

Lewes

3.11 The Council are keen to ensure that Lewes continues to function as a shopping centre, both for day-to-days needs and for specialist goods. Whilst they seek to ensure a wide range of food and household goods are available within the centre, they recognise that Lewes cannot provide the volume of trade and type of shopping available in the larger centres outside the District, such as Brighton and Eastbourne.

3.12 A series of primary shopping frontages are identified along the High Street. The town's primary shopping area is focused on the Eastgate/Cliffe High Street Area. The Council also identify a second, smaller, focus for shopping between the top of School Hill and the castle, within which they want to retain shopping as one of the areas traditional activities and as a service to residents, businesses and tourists. The town centre, as identified within the plan, spans from the west of the High Street, north of the castle, to the eastern end of Cliffe High Street, incorporating the Tesco foodstore, to the north of the Phoenix Causeway.

3.13 The only opportunity site identified within the centre is the Eastgate Centre, currently comprising a supermarket and a number of smaller units. Policy LW7 requires that any development on this site should retain a major foodstore and accommodate a replacement bus interchange, to serve the town centre.

3.14 Having regard to leisure and tourism the Council identify that increased tourism, based on the town's historic and architectural resources will benefit the town, potentially helping to preserve Lewes's

historic fabric and support shops and services used by local residents. Accordingly the provision of additional tourism related activity and associated accommodation is supported by the local authority.

Newhaven

- 3.15 By virtue of its strong employment base and its location on important public transport routes the Council identify Newhaven as one of the most sustainable settlements within the District for the growth of housing. Consequently, the Plan's strategy for Newhaven seeks to balance housing and economic development with the protection of the urban, rural and coastal environment.
- 3.16 The centres primary retail frontages comprise Newhaven Square, South Lane and the High Street which are all set within the town centre, identified as the area contained within the South/North Way Ring Road. No opportunity sites are identified within the town centre but elsewhere the plan identifies development opportunities at Denton Island, West Quay, which has now been built, and the Marina. Additionally on the opposite side of Newhaven Harbour policy allows for a mixed-use development, potentially to include residential, business and leisure uses, should Railway Quay become surplus to the direct operational requirements of the Port.
- 3.17 In terms of leisure and tourism the Council considers that there is potential in Newhaven to use its maritime, industrial, historical and natural heritage to stimulate tourism. Increased local and foreign visitor trade is seen as important in bringing in finance to the local economy, particularly to cafes, public houses, the town centre and guest houses.
- 3.18 In 2004 DTZ were appointed by the Newhaven Strategic Network to develop a retail strategy for the town centre. Whilst this does not form part of the statutory development plan it has been formulated to help decision making in relation to Newhaven. The study concluded that Newhaven's role as a "shopping and leisure destination is at an important crossroads". Highlighting that the centre continues to suffer from a significant leakage of comparison goods expenditure, a problem that is further exacerbated by the relatively poor leisure/A3 uses in the Town and its limited evening economy. DTZ recommend that the Council do everything possible to safeguard the vitality and viability of the centre.

Peacehaven

- 3.19 Policies within the plan aim to make Peacehaven more self-sufficient, in terms of providing both services and employment in the area. Retailing activity within Peacehaven is focused on two areas, the South Coast Road and the Meridian Centre, to the north. Both areas are designated as primary shopping frontages, set within separate Town Centres.
- 3.20 The South Coast Road is identified as functioning, in places, as a traditional high street, whilst the Meridian Centre, planned in the 1970's, provides a range of services in one location. The Council

view the Centre as important to the continued evolution of Peacehaven as a self-sufficient community. Accordingly the widening of retail uses within the centre is seen as desirable although the Council acknowledge that opportunities for the growth of the centre are limited to extending onto the surrounding car park or onto the industrial estate to the east.

- 3.21 The Council acknowledges that the Peacehaven area is lacking in leisure and entertainment facilities. The industrial buildings to the east of the Meridian Centre are also identified as a potentially suitable location for new leisure and entertainment facilities.

Seaford

- 3.22 Seaford Town Centre comprises a range of services and facilities and a good range of shops. The Council considers that the key issue within the centre is the need to retain a viable town centre in order to protect the quality of life and the environment in Seaford.
- 3.23 The Council consider that Seaford is a relatively stable centre and recommend that going forward, emphasis should be placed on filling vacancies and extended existing shop units as opposed to new development, advising that, in the short to medium term, any retail growth can be accommodated in the town centre. The plan identifies Seaford town centres strength as its provision of both day-to-day and specialist retailing.
- 3.24 The primary retail frontages are defined as those along the High Street and Broad Street and west along Dane Street to the Safeway Foodstore. This is located within a more extensive town centre boundary that incorporates the train station and a number of the surrounding uses.
- 3.25 Similarly to the other centres within the District, the Council support the development of tourist related facilities within Seaford. They consider that the economy of Seaford could benefit considerably by more actively promoting the area to tourists in terms of attracting a wider range of shops and facilities, maintaining existing jobs and creating more employment.

LOCAL DEVELOPMENT FRAMEWORK

- 3.26 Following the introduction of the Planning and Compulsory Purchase Act the Statutory Development Plan is to consist of:
- i) Regional Spatial Strategies, to be prepared by the Regional Planning Bodies (considered above); and
 - ii) Local Development Framework to be prepared by district councils'

- 3.27 During the transition from the previous system, adopted Structure and Local Plans can remain in force for up to three years from the commencement of the Act. Where Local Planning Authorities can demonstrate to the Secretary of State that the existing policies are still up to date, and that it is not feasible or desirable to replace them within the three-year period, there is opportunity to apply for an extension to the three-year cut-off date.
- 3.28 Guidance within PPS12 makes clear that the local development documents, to include statutory development plan documents and non-statutory supplementary planning documents, should collectively deliver the spatial planning strategy for the local planning authority's area. The local development plan will also include a statement of community involvement, the local development scheme (LDS), a public statement of the programme for the production of the local development documents, and an annual monitoring report. Local planning authorities should also include any local development orders and/or simplified planning zones which have been adopted.
- 3.29 The Core Strategy should set out the key elements of the planning framework for the area. Once adopted, all other development plan documents must be in conformity with it. The core strategy should normally be the first development plan document to be produced, except where the local planning authority has up-to-date saved policies and where the priority in the local development scheme is the preparation of an area action plan or other development plan documents. In areas where significant change or conservation is required, Area Action Plans (AAP's) should be prepared. Such plans will provide a more detailed framework for development in the area to which they relate, focusing on implementation and providing the mechanisms needed to ensure that development is of an appropriate scale, mix and quality for key areas of opportunity, change or conservation.
- 3.30 An LDS should identify the local development documents to be prepared, state which policies and proposals of saved development plans (i.e. existing local plans) will be replaced by local development documents; provide an explanation of the relationship between local development documents, set out the planned timetable for completion of each local development document; set out any other pertinent supplementary planning guidance and set out a framework for the monitoring and review of the documents.
- 3.31 The LDS should be revised when necessary. This may either be as a result of the annual monitoring report which should identify whether the local planning authority has achieved the timetable set out in the scheme or if there is a need to revise and/or prepare new local development documents. Local planning authorities must consult with the Government Office and the Planning Inspectorate in the development and review of the local development scheme, so that the timing of the examinations of development plan documents and the statement of community involvement can be confirmed.

- 3.32 Lewes District Council has begun to review the adopted Local Plan, and this review will now take the form of a Local Development Framework.
- 3.33 The Local Development Scheme (LDS) for the District came into effect in February 2005. This represents the starting point of the formal review process, setting out the arrangements for the production of the Local Development Framework, the status of the policies and the timetable for their preparation. The LDS confirms that the planning policy framework for the District of Lewes will comprise the following Local Development Documents:
- Statement of Community Involvement;
 - Core Strategy;
 - Housing and Employment Allocations;
 - Development Control Policies;
 - Proposals Map and Site Specific Policies;
 - Renewable Energy; and
 - Developer Contributions.
- 3.34 Of these the statement of community involvement has been progressed the furthest and is currently with the Secretary of State. The community is currently being engaged on the other documents and it is anticipated that these will be adopted as they are finalised through to 2009.
- 3.35 This analysis provided within this study will inform the core strategy, the development control policies and the site specific policies.

SOUTH DOWNS NATIONAL PARK (DESIGNATION) ORDER

- 3.36 In December 2002 the Countryside Agency submitted an order to have the South Downs designated as a National Park. The area to which the order relates would be 73 miles from end to end stretching from Winchester to Eastbourne, and would include the town of Lewes and border the settlements of Newhaven, Peacehaven and Seaford to the south.
- 3.37 A public inquiry to hear objections to the order opened in November 2003 and closed on 23rd March 2005. The inspector is due to produce his report to the Secretary of State towards the end of 2005. Should the Order be granted it will create a new tier of government. Consequently the National Parks Authority will take over the planning responsibilities for much of the District of Lewes and the

Council will have to consider the conditions of this in bringing forward their Development Plan Documents.

SUMMARY

- 3.38 The East Sussex Structure Plan seeks to safeguard the vitality and viability of existing centres, in order to allow these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form.
- 3.39 The Lewes District Local Plan was adopted on 31st March 2003. The plan identifies the main centres within the District as Lewes, Newhaven, Peacehaven and Seaford. These centres are identified as providing an important central core, both economically and socially to these towns. Accordingly the retention of a sufficiently large and economic “critical mass” of town centre shopping and services is seen as important and the plan makes clear that these centres are to form the focus of future commercial development within the District. Whilst Newhaven, Peacehaven and Seaford are identified as primarily serving localised catchments the Council acknowledge that the trade draw of the numerous specialist operators is vital to Lewes.
- 3.40 The review of the Local Plan will now take the form of a Local Development Framework. The Local Development Scheme (LDS) for the District came into effect in February 2005, and the statement of community involvement is currently waiting approval. This represents the starting point of the formal review process, setting out the arrangements for the production of the Local Development Framework, the status of the policies and the timetable for their preparation.

4. RETAIL AND LEISURE TRENDS

- 4.1 This section examines key trends and drivers for change in the retail and leisure industry. This review is drawn from a range of published data sources, including up-to-date research by Verdict Analysis, Mintel and the New Economics Foundation.

NATIONAL RETAIL TRENDS

- 4.2 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing within the District.

Income and Expenditure

- 4.3 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms, but most of this growth has been in comparison goods, with virtually no increase in convenience goods expenditure.
- 4.4 Over the last 25-30 years comparison goods expenditure per head has shown growth of nearly 5% per annum in real terms, i.e. an overall increase of over 200% in real terms over the last 25 years. In contrast, convenience goods expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long terms trends appears probable over the medium to long term.
- 4.5 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

Out-of-Town Retailing

- 4.6 Over the past 10 years, out-of-town has been the engine of retail growth. While retail sales as a whole increased by 62.1%, sales from out-of-town (OOT) stores grew nearly twice as fast, at 118%. OOT retail parks have provided retailers with larger, lower cost units than in town centre locations and they have used this opportunity to broaden their product offer and drive down prices. It has been

a winning formula not just for grocers' superstores and bulky goods retailers but also, if carefully applied, for a growing number of high street retailers.

- 4.7 In terms of individual sectors, Verdict expect DIY to be the fastest growing OOT sector, with sales expected to grow by up to 39.2% over the next five years. Clothing and footwear will be the second fastest growing OOT as retailers take up more units on shopping parks to take advantage of more spacious accommodation. General merchandise retailers will also grow strongly (35.4% over the next five years), in particular Argos. Electrical retailers are expected to grow by 35.3% driven by demand for new technologies such as LCD TVs and recordable DVDs.
- 4.8 Given the limited range of comparison retailing in the District of Lewes, such trends are likely to compound existing needs and enhance further the appeal of such retail destinations in larger centres, such as Brighton and Eastbourne.
- 4.9 According to Verdict, Grocers' OOT sales will grow more slowly than other sectors but it will remain the largest sector accounting for 65.5% of all OOT sales. This rate of growth is much faster than the 15.4% growth expected in spending on food due to the increasing quantity of space large scale out of centre stores are dedicating to non-food products – where demand is growing more strongly. This places greater pressure on the in centre stores that anchor the main centres within Lewes.

Town Centre/High Street Retailing

- 4.10 Despite the growth of OOT retailing, high street retailers (including those in shopping centres) clocked up sales of £122.7 billion in 2003, 49.1% of the money spent by consumers on retail. Notwithstanding the growth of out of centre retailing and online retailing, the High Street's share of all retail spending is only fractionally down on its 50.8% share of 10 years ago. This is primarily because it is the convenience goods retailers located in the neighbourhood that have born the brunt of this migration of shoppers to out of centre locations and not the high street.
- 4.11 Deflation has become a major issue for retailers on the high street. In 1993-98, high street retailers experienced average annual inflation selling prices of 2.4%, but over the last five years there has been deflation of 0.7%. Several factors have contributed to deflation, including aggressive price competition from OOT retailers. But OOT competition is not the only explanation; on the high street itself, new low cost retail models such as Primark, Savers and Wilkinson are able to challenge established retailers like M&S, Boots and Woolworths.
- 4.12 Notwithstanding this, the High Street has become a high cost location. A shortage of units in prime locations has put upward pressure on already high rents, employment, insurance and distribution/servicing costs are rising, as are tax burdens for retailers signing new leases. Despite these difficulties many high street retailers are thriving. The thrivers (Argos, Debenhams, HMV, John Lewis and Next) have managed to grow sales by 62.8% or £4.2 billion over the last five years, while

the strugglers (Bhs, Boots, Dixons, House of Fraser and M&S) have only achieved a 12% or £1.5 billion uplift in sales. The most important ingredient for reinforcing margins appears to be a distinctive product offer.

- 4.13 Perhaps the most encouraging indicator of the long term health of the high street is the strong pipeline of new developments over the next five years. As planning consent for OOT sites has become harder to gain, developers have switched their attention back to the city centre. However, at the current time the majority of these 'in centre' proposals are focused on the larger centres. Whilst in accordance with the key objectives of Government Guidance such initiatives pose a potential threat to the centres within the District of Lewes, where development opportunities are typically limited, as competing centres outside the District are able to enhance their appeal as a retail destination.

Number of Shop Units

- 4.14 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. With the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers. The number of food specialists has declined by 19% from 48,301 in 1992 to 39,131 in 2002. Whereas the number of large superstores has increased by 50% from 860 in 1992 to 1,292 in 2002.
- 4.15 During 1992-2002 leading supermarket multiples increased their share of the grocery market, as a result of the success of the superstore format. Superstores have grown their market share from 30% in 1992 to just over 40% in 2002. Most recently within the District the new Sainsbury on the outskirts of Newhaven illustrates this trend.
- 4.16 Certain specialists have suffered more than others. The fishmongers share of the total grocery market has declined from 0.5% in 1992 to 0.1% in 2002. Butchers have also lost nearly 2% of their market share, declining from 4.1% to 2.2%. Greengrocers, bakers and other specialists have been slightly more robust, yet all three have lost market share. While local neighbourhood centres will retain a more localised 'top up' role, many are likely to decline irrespective of new development proposals. The continued growth of larger, national brand, supermarkets will have an impact on smaller stores within the district, especially those outside the larger centres who have traditionally served local day to day needs.

Retail Polarisation

- 4.17 The last few years have seen a sustained fall in OOT shopping centre and retail park development and instead a corresponding resurgence in activity has been concentrated into a few large schemes in dominant regional centres. The top 70 centres in the country now attract over 50% of the country's

population for comparison goods shopping. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres, which will further reinforce their dominant market share. Within easy travelling distance of the sub regional centres of Brighton and Eastbourne, such trends are highly pertinent to retailing within the District of Lewes.

- 4.18 The growth of multiple traders and increased competition between traders has meant that the retail structure is increasingly dominated by large companies. In tandem with this change, multiple occupiers have pushed for larger shop units. Shopping centres which have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger in the largest centres) have grown in importance, reinforcing the trend of higher order centres growing in relative importance, i.e. polarisation in the retail hierarchy. The growth in car ownership and mobility has compounded, coupled with increased affluence, as shoppers are prepared to travel greater distances to shop in larger centres with a strong retail offer.
- 4.19 This concentration of retailing in larger centres, such as Brighton and Eastbourne, is likely to threaten smaller towns, such as those in Lewes, unless they are able to secure new development of sufficient scale and quality to retain expenditure, generate new inflows and attract key retailers.

The Internet and Non Store Trading

- 4.20 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing amounts to about 7% of comparison goods expenditure. Mail order has a long history, and whilst it has suffered to some extent from the rise of the internet, it has evolved and new retailers have entered the market and expanded, such as Next, Marks and Spencer and more recently John Lewis. GUS bought Argos and Homebase and Littlewoods bought Index. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store based shopping.
- 4.21 The growth of e-tailing has been phenomenal over the last few years, but from a very small base. Growth rates of 70% per annum were not unusual two years ago and whilst this growth has now come down to about 30% per annum this represents a very strong growth rate compared to bricks and mortar retailing. It is estimated that about 5% of retail expenditure is now conducted on the internet, although most foodstore operators have closed their virtual stores or warehouses and operate home deliveries out of existing stores. Books, games, DVD'S/video's and CD's along with finance, insurance and travel services have been the most affected, but small electrical goods, computer hardware and software, white goods, toys and gifts, and some clothing and footwear could see internet sales take an increasing share of retail spending.

Convergence of Retail and Leisure

- 4.22 Consumers are no longer satisfied with simple retail: they want to be inspired and increasingly view retail as a leisure activity. There is an emerging trend towards the development of mixed use retail and leisure schemes. Many new shopping centres, and those currently under construction, go beyond retail to include a selection of restaurants, bars and often multiplex cinemas, health clubs and bowling alleys. Combining these leisure facilities with a strong retail offer encourages shoppers to browse for longer and, crucially, spend more.
- 4.23 The High Street has, so far, been slow to adapt to the changing working patterns of consumers. Whereas the vast majority of OOT retail parks stay open into the evening so that people can shop during the week, high streets typically shut for business at 17:30 – the same as most shoppers finish work. High Street operators will need to address this drawback if they are to fight off competition from OOT retail parks. The increasing leisure emphasis in town and city centres may provide an ideal catalyst for this – bars, restaurants, cinemas and other entertainment attract footfall later into the evening which could be exploited by retailers. Again larger centres such as Brighton and Eastbourne are able to embrace these trends strengthening their position within the retail hierarchy, putting further on smaller centres within their catchments, such as those with the District of Lewes.

Convenience Retailers

- 4.24 The leading foodstore operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and have been more innovative in their town centre proposals. Discount retailers continue to seek opportunities to expand their networks. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies.
- 4.25 In the past five years supermarket multiples have strengthened their hold on the UK grocery market, taking share from most other operators in the process. Independent and smaller chains of grocers and convenience stores have been the key losers and acquisition targets, with 2003 share of the market a mere third of the level in 1998. All food specialists have come under pressure while off-licences have suffered heavily from the growing 'beer, wine and spirits' offer of both major grocers and convenience stores.
- 4.26 The growing share of the supermarket multiples has primarily been driven by the performance of four players – Tesco, Asda, Morrisons and the Co-Op, which between them have put 9.8% on their combined market shares over this period. These players have emerged as the leading sales winners among UK grocers, while the rest of the market has typically struggled.
- 4.27 Morrisons have aggressively extended their market share by buying up the majority of Safeway stores in 2003. This is pertinent to the district, as Morrisons have purchased the former Safeway

units in both Lewes and Seaford. Whilst these store have now changed ownership and many of the goods within both store are now Morrisons own branded the stores have not yet been re-branded. Both stores effectively therefore continue to trade as Safeway stores and as such are referred to as Safeway's stores, as opposed to Morrisons stores, throughout this report.

- 4.28 At a national level the pressure for larger superstores and hypermarkets will continue, although any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, sequential approach, appropriateness of scale and impact.

Market Towns

- 4.29 As a result of many of the trends considered above many small towns are facing issues of decline, and are struggling to maintain their role as the economic focus for town residents and those in the surrounding areas. Many people living in small towns and rural areas choose to travel to more distant shopping centres when shopping for food in bulk and for major comparison items, in order to enjoy the benefits of wider choice, easy parking and the amenities provided by larger retail complexes.
- 4.30 The retail market is undergoing continuous change and is increasingly competitive and as detailed all town centres are being effected by these trends. Of the 1,400 or so main retail centres in Britain, about 1,000 are in decline relative to the faster growing larger centres, so the gap between large and small centres is continuing to widen. Significant new retail development in smaller centres is now rarely financially viable, and such centres are not able to attract multiple retailers. Smaller towns face the future increasingly reliant on independent rather than multiple retailers. It is difficult for developers to achieve financial viability with new retail developments outside the 200 leading centres. As a result, little such development is occurring in smaller centres.
- 4.31 However, the growing dependency on independent operators does provide small towns with an opportunity to reinforce their distinctiveness. Market Towns are being encouraged to think beyond simply retailing, traditionally such centres have provided a variety of functions for local residents. Restaurants, bars, video shops and other related leisure-related business are expanding. Service businesses such as fitness clubs are growing and other such as medical and dental practices, are changing their way of operating so that they become suitable for retail premises in or near town centres.
- 4.32 Many commentators consider that the future of retailing in most small towns will depend on towns building on existing consumer loyalties and marketing themselves appropriately, to include initiatives such as:
- Developing a reputation for excellent customer care;

- Offering speciality shops;
- Cultivating distinctiveness; and
- Offering attractions and events that visitors can combine with shopping.

Rural Services

- 4.33 The Rural White Paper (2000) examines the key issues facing rural areas. It identifies that around a third of all villages have no shop and the loss of banks, garages and pubs in rural areas has continued. It notes that the decline in village shops was steady in the 1970s, but has slowed since then. The Rural Services Survey (2000) indicated that most rural settlements have neither a general store (78%) nor a small village shop (72%), however, 80% of rural households live within 4 km of a supermarket.
- 4.34 Rural banks and building societies are primarily concentrated in market towns, with populations above 3,000 people. The Countryside Agency has identified a relatively small reduction in the number of rural banks and building societies in recent years. Currently 9% of parishes have a bank or building society, compared with 11% in 1991. In addition despite this fall, 78.4% of rural households live within 4km of a bank or building society (Rural Services Survey, 2000). However, with the advent of increased levels of telephone and internet banking the presence of such facilities may decline further. This could have an effect on small local businesses that are dependent on such outlets to meet their financial needs, particularly the banking of cash and those people that do not have access to the internet.
- 4.35 Research undertaken by New Economics Foundation found that the Post Office network has been shrinking over the past decade. They estimate that in 1981 there were 22,000 post offices in Britain, however the most recent figures (2003) suggest that this figure has fallen to 17,239 branches. The Countryside Agency has also examined the closure of post offices in rural areas. They draw on data from parish surveys, which reveal that 58% of parishes had a post office in 1991, compared with 54% in 2000.
- 4.36 Post offices in rural areas play a vital role in serving the rural catchments for financial services and public information. A Study by Postwatch, a watchdog organisation, in late 2002 found that 69% of rural customers use their post office for a variety of reasons, including free community services, government information, community notice boards and for social reasons. The closure of post offices therefore has a number of unseen knock-on effects. The study indicated that local businesses reported a reduction in trade, as a result of post office closure and rural residents felt that the community spirit in the villages was badly affected.

- 4.37 The Government announced in December 2002 that they would provide the Post Office with approximately £450 million in return for keeping rural branches open. However, industry observers, particularly the New Economics Foundation believe this has achieved little in reversing the trend.

NATIONAL LEISURE TRENDS

Demographic Trends

- 4.38 In Mintel's 'The Changing Face of Leisure 2003', demographic trends are highlighted as working in the leisure market's favour, with growth in the youth population outstripping that of the UK adult population as a whole. Younger adults tend to have a higher participation on many leisure activities such as sports and socialising. According to The Office of National Statistics (ONS) the 15-19 and 20-24 year old age brackets are both set to increase by over 10% between 1998 and 2006. The age group '55-64' is also forecast to increase by over a fifth between the same period. Mintel states that this represents an important demographic for the leisure industry as this age group (55-64) is more likely to be 'time-rich and cash-rich'.

Social Trends

- 4.39 A number of profound changes within the structure of society have, over the last 25 years, impacted upon our consumption of leisure. According to the Department of Trade and Industry (DTI), people in the UK work the longest hours in Europe, with more people working in excess of 60 hours per week. A survey undertaken in 2002 by the DTI's Work-Life Balance Campaign revealed that one in six men now work 60+ a week compared to one in eight two years ago. The number of women working similar hours has also increased, doubling to one in eight.
- 4.40 A survey undertaken by Mintel in April 2003 questioned respondents on the level of stress in their lives. The results revealed that around a fifth of adults definitely agreed with the statement 'my life is quite stressful', and in total nearly half of the respondents tended to agree with the statement. Stressful lives, mostly brought on by work pressures and long working hours, have a direct effect on leisure time, not only reducing leisure time but also how consumers then choose to spend it.
- 4.41 Mintel highlights 'household working patterns' as one of the more important influences on consumer spending and behavioural patterns in general. In particular, the overall level of employment has increased by 3.4% between 1998 and 2003, although the growth in women in employment has risen twice as fast as that for men. This increase in 'cash-rich, time poor' consumers has a great influence on the leisure industry. As money is no longer as important as time, many consumers are prepared to pay a premium for convenience in order to save time. Mintel concludes that this is particularly prevalent for the increase in eating out habits and individual sports such as swimming and going to the gym.

- 4.42 The significant change underway in the number and structure of households is having a large influence on leisure trends. Mintel indicates that the trend towards a growing number of one-person households has benefited the leisure market, as it has helped drive the overall number of households up. In terms of those households with more than one person, the biggest growth is in the two-person household. This reflects the trends of a larger ageing population, children leaving home to set up with a partner and younger people leaving the decision to have children until a later age.

Economic Trends

- 4.43 In economic terms, real growth in levels of personal disposable income, coupled with low unemployment, have resulted in a buoyant leisure market generally, with consumers being prepared to spend more on leisure activities. Drawing on National Statistics, Mintel highlights that 'Personal Disposable Income' (PDI) increased by 18% between 1998 and 2002 in real terms, and consumer expenditure increased by 19%. PDI and consumer expenditure are forecast to grow despite the slowing of the economy, helping to grow the leisure industry further.
- 4.44 A significant trend influencing the leisure industry is the large increase in the proportion of Class AB adults in the population. This increase is important for the leisure industry, in terms of there being an increase in affluence, as generally AB's are higher income earners. Mintel recognises, however, that there are also generally more working hours and higher stress levels involved with the higher managerial positions usually associated with AB's, which will have a huge influence on how leisure time is spent. Between 1998 and 2006, it is forecast that AB's will increase in number by 33%. The state dependent E group is set to decrease by 19.1%.

Leisure Choices

- 4.45 The range of leisure choice now on offer to the consumer has grown considerably within the last decade, leading to an increase in competition within the leisure industry (Table 4.1). It is evident that the pace of growth in the cinema and the health and fitness market has been notably faster than other sectors. According to Mintel's report on Health and Fitness Clubs – UK (May 2003), between 1998 and 2002 the value of the private health & fitness clubs market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognised changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development.

Table 4.1: Comparison of spend on selected leisure activities, 1998-2003

	1998 £m	1999 £m	2000 £m	2001 £m	2002 £m	2003 (est) £m	% change 1998-2003
Bingo	1,019	1,041	1,076	1,118	1,164	1,205	+18.3
Cinemas	720	781	827	895	965	1,026	+42.5
Health & fitness*	1,084	1,226	1,434	1,667	1,753	1,848	+70.5
Nightclubs and discotheques**	2,156	1,975	1,830	1,804	1,767	1,727	-19.9
Tenpin bowling	201	206	219	233	245	258	+28.4
Theme parks	224	236	232	236	249	259	+15.6
Eating out***	20,029	21,116	22,230	23,246	24,436	25,092	+25.3

* Data relate only to private clubs and therefore exclude those clubs run on behalf of local authorities

* Corporate facilities are also excluded

* Includes spend in fast food outlets, pub catering, restaurants and other catering, but excludes 'chameleon/hybrid'- type outlets - Source: Mintel

- 4.46 Between 1998 and 2003, Mintel estimates that the 'eating out' market grew by some 25%, largely due to convenience for consumers, an increase in disposable income and the social aspect of eating out. Mintel identifies that consumers are increasingly choosing to make life easier for themselves in order to offset the stress brought on by everyday life. Leisure time is becoming a precious commodity to consumers and in order to maximise free time, consumers are often choosing to combine a number of activities in an evening. As eating out has become less formal, it is now not necessarily the focus of the evening out but is considered as part of an overall experience.
- 4.47 Trading through pubs has grown slowly since 1998 despite buoyant economic conditions (Table 4.2), and, according to Mintel, the total number of licensed premises has remained fairly stagnant between 2000-2003. A significant amount of trade has been diverted to 'take-home' purchasing through supermarkets, shops and off licences, as well as cross Channel supplies. This has led to the major pub-landlords innovating in order to attract customers back to the pubs. Concepts include family pubs, and large 'superpubs' and sports bars in City Centres, all attracting a predominantly young clientele. Mintel's research 'Pub Catering UK Leisure Intelligence (July 2002) concluded that the revenue generated from pub catering increased by 27% in current terms between 1997 and 2001, and exceeded pub sales growth in alcoholic drinks by 23%.

Table 4.2: The UK Pub Market, 1996-2003

	Outlets No.	Index	Turnover £bn	Index	Turnover per outlet £*	Weekly turnover
1996	72,329	100	20.6	100	285,000	5,480
1997	71,846	99	21.3	103	297,000	5,700
1998	71,700	99	21.9	106	305,000	5,870
1999	71,048	98	22.4	109	315,000	6,050
2000	70,504	97	22.7	110	322,000	6,200
2001	70,660	98	22.9	111	324,000	6,230
2002	70,900	98	23.1	112	326,000	6,270
2003 (est)	70,500	98	24.3	111	344,681	6,628

* data calculated using estimated weekly turnover as the base gross (eg including VAT)

Data may not equal totals due to rounding

Mintel uses a broad definition of pubs to include all fully licensed premises, some of which are bars situated in hotels and others similar to licensed cafés or restaurants

Source: Mintel (see endnote 13)

- 4.48 Technological developments have had a huge influence on the leisure industry and how we spend our leisure time, with consumers becoming increasingly comfortable with the technology in their homes. The continued trend towards TV watching has been encouraged by the increasing number of channels now available, particularly via satellite and cable. Not only are emailing and surfing the Internet considered leisure activities, but online gaming, gambling and other activities are becoming increasingly popular. Using this medium can become a time saver for other leisure activities, such as shopping, booking tickets for cinema, theatre or concerts, and booking holidays.

Leisure/Mixed Use Development

- 4.49 Since the mid-1990's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres. For example, urban living is back in fashion; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade', and the ability to capitalise on proximity to businesses and shoppers.
- 4.50 This change in location has also been combined with the inclusion of leisure complexes that incorporate both retail and leisure facilities. Leisure facilities can be used as a way of encouraging customers to stay longer and consequently spend more. Festival Place in Basingstoke is an example of this, where a mainstream town centre retail provision is integrated alongside recreational and leisure uses including a cinema and a variety of restaurants.

TOURISM TRENDS

- 4.51 Tourism represents a key revenue generator for the UK economy and for the South East in particular. According to Department of Culture Media and Sport (DCMS), hundreds of millions of holidays are taken, and day trips made, in the UK every year. The businesses that serve those visitors make up an industry worth around £76 billion a year – about 4.4% of UK GDP. It is estimated that 2.1 million people, or 7.4% of the working population, work in the tourism industry. The UK is the seventh in the table of world tourism earners.
- 4.52 A wide range of sectors exist to meet tourist needs, and consider themselves part of the wider tourism industry. These include accommodation and hospitality providers, holiday parks, and visitor attractions. The success of tourism also dictates the fortunes of a number of other sectors which contribute greatly to the attractiveness of England for domestic tourists, and of Britain as a destination for overseas visitors – including transport, galleries, museums, theatres, heritage sites in public and private ownership, conference and exhibition venues, shops, pubs, clubs and restaurants.
- 4.53 Traditionally, tourism has been underpinned by the major annual holiday. While still important, this is not an area of significant growth for domestic or overseas visitors. The growth area in the domestic market is in day trips and short breaks, often based around cultural pursuits, heritage attractions or shopping, or themed around attractions and hobbies. The DCMS believes that this £76 billion a year industry has the potential for rapid growth and will be worth £100 billion by 2010.
- 4.54 The South East comprises the largest tourism market in the UK outside Greater London. This is supported by the following key factors:
- Diversity of the region's environment
 - The strength of its economy
 - Geographical location
 - Proximity to London
- 4.55 In 2003 tourist domestic trips to East Sussex totalled 3.4 million making it the second most popular sub region in the south east behind Hampshire which attracted 3.7 million trips. These trips generated a total domestic tourist spend of £434 million. The appeal of East Sussex to tourists represents an opportunity for smaller centres such as Lewes to extend their sphere of influence, providing they are able to differentiate their retail and leisure offer from the larger centres.

SUMMARY

- 4.56 National retail trends indicate a slowdown in the growth of retail sales, compared to recent figures, but overall sustained growth of circa 4% is expected. In parallel, we anticipate a continued decline in the number of shops and a further shift of retail activity to fewer, larger centres. This pattern of polarisation applies both at the strategic level, where the growth of competing sub-regional centres pose a major challenge to the key centres within the district, and at the local level where sales are increasingly becoming focused into a network of large dominant foodstores.
- 4.57 As a result many small towns are struggling to maintain their role, and retain and attract multiple retailers. As a consequence, many smaller towns are increasingly reliant on their convenience and services function, and independent rather than multiple retailers. However, this does provide opportunities for smaller towns to reinforce their distinctiveness and brand themselves accordingly.
- 4.58 Demographic trends are working in the leisure market's favour, with growth in the youth population outstripping that of the UK adult population as a whole. There has also been a significant increase in the 'time-rich / cash-rich' 55-64 year old age group. However, work pressures and long working hours have had a direct effect on reducing leisure time for many age groups. For this growing 'cash rich / time poor' consumer group money is no longer as important as time, with many prepared to pay a premium for convenience.
- 4.59 The South East comprises the largest tourism market in the UK outside Greater London, and East Sussex attracts a significant proportion of these visitors. The growth area in the domestic market is in day trips and short breaks, often based around cultural pursuits, heritage attractions or shopping. These trends present significant opportunities and challenges to the centres within the district.

5. SUB REGIONAL CONTEXT

OVERVIEW OF COMPETING CENTRES

5.1 In June 2004, DTZ were commissioned to carry out a study to forecast future retail growth in South East England, to inform the regional spatial strategy. As part of this analysis DTZ examined the network and relationships between centres in the South East by evaluating key performance indicators, focusing on:

- Databases that ranked or scored according to different characteristics such as size, the quality of the businesses trading in each centre, and other Key Performance Indicators;
- An analysis of the scale of floorspace and numbers of business in each centre;
- The presence and function of other non-retail town centre uses including office, and cultural and leisure facilities.

5.2 The study ranked the 181 retail destinations identified within the Region. Table 5.1, shows how the centres within the district rank against the other key centres within the sub-region.

Table 5.1: Retail Hierarchy within South East England

Centre	DTZ Rank
Brighton	9
Crawley	16
Eastbourne	17
Lewes	68
Haywards Heath	70
Burgess Hill	86
Seaford	96
Uckfield	97
Halisham	124
Newhaven	157
Peacehaven	166

Source: DTZ

- 5.3 It is evident that Brighton, Eastbourne and Crawley are strong retail destinations, which perform a 'higher order' function. Their relative provision is considered in more detail in table 5.2:

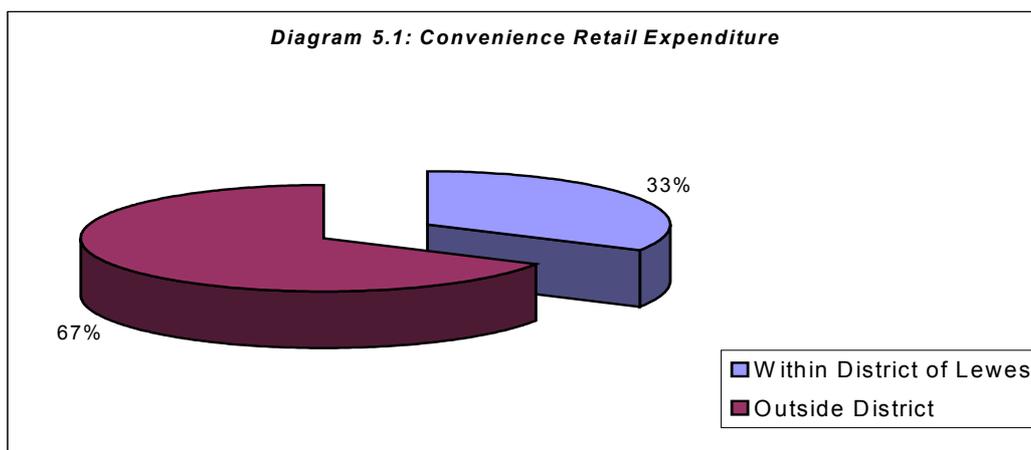
Table 5.2: Competing Sub Regional Centres

Centre	Floorspace sq. m (000's)	Shopping Population Rank Position	National Retail Ranking 2002	Miles from Lewes Town Centre
Brighton	147	40	23	8.3
Crawley	85	59	48	25.9
Eastbourne	99	69	97	19

Note: National Retail Rankings 2002 most up to date assessment of top 500 centres.

EXISTING TRADING PATTERNS

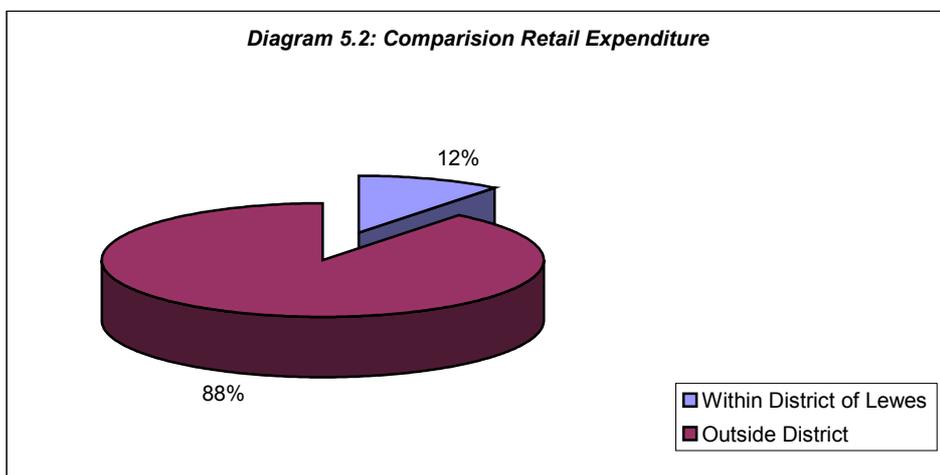
- 5.4 In order to identify existing trading patterns we commissioned a household survey covering 1,000 households, to determine shopping habits for convenience and comparison goods. The survey area, illustrated on Plan 1, has been divided into 12 sectors, based on postcode geography. The questions asked in the survey are included at Appendix 1
- 5.5 For convenience goods, the Household Telephone Survey included questions on main food and top up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type. For food we use a 75% main food / 25% top up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone.
- 5.6 Currently only 33% of the convenience retail expenditure generated within the study area is retained within the district, as highlighted in diagram 5.1. Such a high level of expenditure leakage is surprising given the existing convenience retail provision within the District. However, while each centre is anchored by a main foodstore, some are somewhat dated, compared to the more modern facilities outside the district.



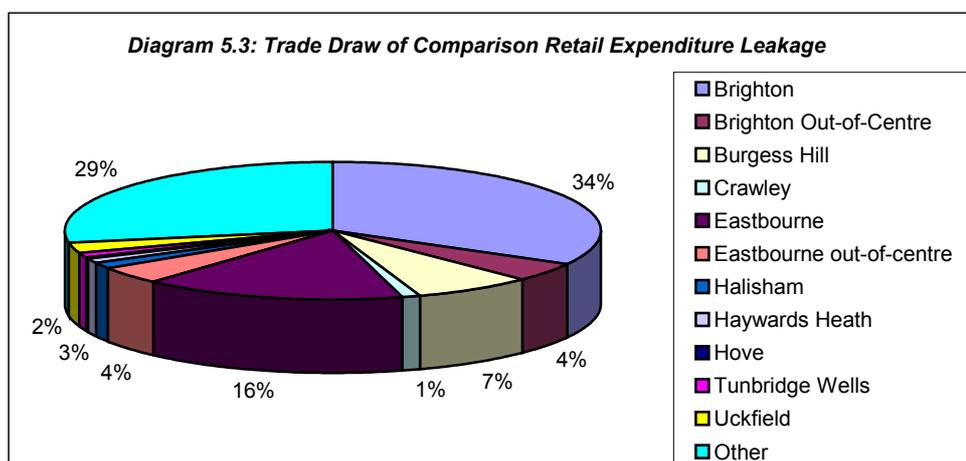
5.7 For comparison goods, the survey includes five questions on specific good types which coincide with Experian Business Solutions definitions of comparison goods expenditure on that good type. Such an approach enables us to model the pattern of spending of the residents within each zone on the following categories of goods:

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- Personal/luxury goods.

5.8 It is evident from diagram 5.2, below, that a much greater proportion of comparison expenditure from within the study area is currently lost to destinations elsewhere. Comparison expenditure generated within the study area totals some £544.25 million, of which only £62.54 million, 11.5%, is spent within the district based on the survey results. In practice we consider the survey is likely to have overestimated the level of leakage.



- 5.9 As Diagram 5.3 highlights, Eastbourne and Brighton represent the two most popular retail destinations to residents within the survey area, accounting for 49% of the total expenditure generated. Brighton draws the highest proportion of trade from the study area, attracting 36% of the money spent outside the study area, by comparison, Eastbourne attracts 19.4%. The out-of-centre retail parks in Brighton and Eastbourne also attract a significant proportion of trade from the study area. Crawley only attracts minimal trade from the study area, primarily because residents from within the study area do not need to travel this distance for a regional shopping offer given the proximity of Brighton and Eastbourne.
- 5.10 A significant proportion of trade is also lost to the smaller centres located on the peripheries of the District boundary, notably Burgess Hill, Haywards Heath and Uckfield. The three centres account for 10% of the comparison goods expenditure generated within the study area.



- 5.11 The offer within each of these key competing centres is considered in more detail below.

BRIGHTON

- 5.12 Brighton borders the District to the west. Its primary catchment area encompasses the built up areas of Brighton, Hove and Shoreham-by-Sea, and extends north to include rural locations in the Sussex Downs, Hurstpierpoint and the outskirts of the Burgess Hill and to the east to include much of the District of Lewes.
- 5.13 Retail floorspace within Brighton City Centre totals circa 147,000 sq. m. The city is well represented in terms of multiples and there is a large number of speciality and up-market retailers. Department store representation within Brighton is weak for a city of its size. However, its retail offer is complimented by a high level of service provision, particularly restaurants and fast food outlets.

- 5.14 Brighton has a below average proportion of managed floorspace with only one managed shopping centre, Churchill Square, which fronts the southern side of Western Road. The centre, which was refurbished in 1998, provides just over 45,000 sq. m . of floorspace on two trading levels and is largely occupied by mid-market multiples, including, in addition to Debenhams, Habitat, Bhs, Virgin, HMV and WH Smith.
- 5.15 The former Hanningtons department store has been refurbished to create a 5,574 sq. m unit shop development aimed at lifestyle and quality fashion retailers, including The Pier, Benetton, Monsoon, LK Bennett and Mango. The retail offer in Brighton is set to be enhanced further with a number of prominent schemes in the pipeline.
- 5.16 Wildmoor Properties is redeveloping the North Street Quadrant (on the corner of North Street and Queens Road) to create unit shops and a restaurant at ground level with offices above. Furthermore, consent exists for an extra floor to be added to the unit currently occupied by Next, in the Churchill Centre. Beyond the town centre boundary, planning consent also exists for a mixed-use redevelopment of a site adjacent to Brighton Station, to be known as the New England Quarter. The scheme will comprise a Sainsbury's along with additional A1/A3 units, two hotels, offices and an educational facility.
- 5.17 Recently Councillors have decided to seek commercial partners for redeveloping the Brighton Centre and planning guidelines have been approved for proposed redevelopment of part of the Centre to provide retail, hotel, leisure and residential development. The 12.6 hectare area extends north to Churchill Square and encompasses the Kingswest and Grand and Metropole Hotels. Recently, Brunswick Developments have also unveiled plans for the £175m redevelopment of Brighton Marina.
- 5.18 There is currently strong retailer demand to locate in Brighton, and levels of demand have increased over recent years. In October 2000 there were 134 requirement to locate in Brighton and this had grown to 183 by October 2004. Requirements include; quality mid-market and up-market fashion operators such as Elle, Jaeger, Massimo Dutti, Austin Reed, Paul Costelloe, USC, and Zara; specialist retailers including Lillywhites, Lakeland, Nike, Oil & Vinegar; and department store operators such as House of Fraser, Harvey Nichols and TJ Hughes. In addition, a large number of cafés/bars/restaurants, are also seeking representation within Brighton.
- 5.19 Brighton seems set to remain top of the sub-regional hierarchy and its continued dominance will polarise further retail and leisure activity in the surrounding catchment.

BURGESS HILL

- 5.20 Burgess Hill is located to the north east of the District within Mid Sussex, between Haywards Heath to the north and Hurstpierpoint to the south. The topography and a new distributor road to the west have served to contain development within the town, and a link road (A2300) connects the built up area to the primary road network. According to the adopted Local Plan (May 2004), Burgess Hill is

- the fastest growing settlement in Mid Sussex, experiencing an increase in population from 8,500 to 28,803 between 1951-2001.
- 5.21 The Experian Goad town centre report (May 2004) identifies that Burgess Hill comprises a total of 31,679 sq. m of ground floor floorspace for retail trade and services, in 188 units. The centre has an above average representation of units occupied by retailers in the comparison and service categories; 3.09% and 5.01% above national average respectively. In particular, the centre has a particularly high number of building society uses and estate agents/auctioneers. Experian Goad highlights that in terms of key retailers, Burgess Hill has just 7 key attractors. This reflects the centres position as a lower order centre relative to the wider retail hierarchy.
- 5.22 Burgess Hill's prime pitch includes the Martlets shopping precinct, the market place indoor shopping centre, the pedestrianised Church Walk and the section of Church Road running from Cyprus Road to Lloyds TSB Bank. Key retailers on the pedestrianised section of Church Walk include BYs Clothing, First Choice Travel Agents, Curry's Electrical Appliances and Peacocks Clothing and Household Goods.
- 5.23 The Martlets Shopping Centre is an open air shopping precinct which opened in 1970 and is accessed from the pedestrianised Church Walk and the market place indoor shopping centre. The scheme has a retail floorspace of approximately 10,200sq m gross, located on one level with approximately 30 retail units. The shopping centre now appears relatively dated, constructed from reinforced and pre-cast concrete materials with flat roofs and a general 1970s concrete appearance. The centre is anchored by Argos, Iceland, Lidl and Somerfield and the Library and community centre is situated to the rear of the shopping centre accessed by Civic Way.
- 5.24 Market Place indoor shopping centre is a newer scheme accessed by Church Road and the Martlets Shopping Centre. The indoor scheme opened in 1991 and has a retail floorspace of approximately 11,148 sq m gross. Falling within the primary shopping frontages, the centre is anchored by Waitrose Foodstore, Boots the Chemist and Wilkinson, and is served by the 400 space Station Road car park.
- 5.25 Secondary retail frontages in Burgess Hill comprise the southern part of Church Road, Station Road extending over the Railway Bridge onto Keymer Road. This area is occupied by a number of financial and professional services including Natwest Bank, Halifax Bank, Barclays Bank and Sterling Financial Advisors. There are also a number of hairdressers, estate agents, beauty salons, fast food take-aways and some clothing retailers. Overall, the retail centre is compact around Church Walk, the Martlets and Market Place, while essential financial and professional services draw pedestrians towards secondary shopping frontages on Church Road
- 5.26 Burgess Hill is a relatively young town, with the majority of development having taken place during the latter half of the 20th Century. The overall environment of Burgess Hill town centre is mixed, comprising pedestrianised areas, traffic through-routes, and a shopping precinct and shopping

centre. Church Walk, within the Primary Shopping Frontage, is pedestrianised with signs of recent public realm investment. The new paving/brick street provides a safe and pleasant environment to shop in and appears to be well maintained with high quality street furniture in the form of co-ordinated benches, litter bins, trees and street lighting. Retail units have little historic character, but fascias are maintained to a good standard.

- 5.27 Currently there are no commitments or proposals within the town centre. However several development opportunities exist and the Council is keen to reinforce the town's role. Within the adopted Local Plan they have allocated land between the Martlets Shopping Centre and Civic Way, including the multi-storey car park, for redevelopment to include retail, including food superstore, leisure/entertainment, residential flats and civic, public and voluntary services.

CRAWLEY

- 5.28 Crawley is situated in West Sussex, approximately 20 miles from the District of Lewes. It is located some 30 miles south of Central London and has a good local road network. The town centre is easily accessible and Gatwick Airport is located just a few miles to the north.
- 5.29 Crawley's primary catchment area extends to East Grinstead in the east and Burgess Hill in the south, encompassing Haywards Heath. The catchment area extends almost to Reigate in the north and Horsham in the west. It is estimated Crawley's primary catchment comprises in the region of 330,000 people.
- 5.30 Retail floorspace within the town centre totals 85,000 sq m. Retail provision is concentrated in two main locations, a pedestrianised precinct development by the New Town Development Corporation, now in multiple ownership, and County Mall to the south. Whilst the offer is relatively extensive much of this comprises mainstream operators; department store provision is limited to a large, modern Debenhams in County Mall, and TJ Hughes. Other large stores in Crawley town centre include Marks & Spencer and Littlewoods on Queensway, Bhs in County Mall and Woolworths on Queen's Square.
- 5.31 County Mall radically altered shopping patterns in the town when it opened in 1992 with several major retailers defecting from the precinct to the new scheme, including Boots and W H Smith. County Mall has a diverse tenant mix and a noticeably higher quality offer than the rest of the town centre. Large stores in the centre include Debenhams, Bhs, Virgin Megastore, Waterstones, Boots and WH Smith. Fashion retailers represented in County Mall include River Island, Warehouse, Laura Ashley, Oasis, Wallis, The Officers Club and French Connection. In addition to the more standard multiples, a number of niche/speciality retailers also occupy units in the centre.
- 5.32 Elsewhere in the town centre, the quality of the retail offer is generally poorer. There are some large multiples in the Queensway/ Queen's Square area, including Marks & Spencer, Woolworths and Littlewoods. Other mainstream multiples include Next, Superdrug, Primark, Dorothy Perkins/ Burton,

New Look and Etam. The quality of provision immediately outside County Mall has been improved markedly in recent years, thanks to a major redevelopment of the east side of The Martlets, the pedestrian throughfare linking County Mall to Queen's Square/ Queensway. Retailers such as H&M, HMV, Top Shop/ Top Man, Sports Soccer and The Works have been attracted to this area.

- 5.33 Two retail schemes in the pipeline will significantly enhance the retail offer within Crawley Town Centre. Crest Nicholson is currently developing an eleven unit scheme totalling 5,000 sq. m at the western end of Queen's Square. Reported pre-lets at the scheme, which is due to be completed by autumn 2005, include Slater Menswear, Peacocks and Costa Coffee. On a larger scale, discussions are ongoing for a large-scale redevelopment in the northern part of the town centre; a draft feasibility study has been published which proposes 68,000 sq m of additional retail space, 400 residential units and offices. The council is expected to select a developer in early/mid 2005 and John Lewis is expected to anchor the scheme with a 23,300 sq m store.
- 5.34 Retailer demand to locate in Crawley has grown over the last decade. In April 2002 the centre had 93 requirements equating to a rank of 43, which is relatively low when compared to Brighton. In October 2004 Crawley's rank had risen to 49 with 96 requirements. The scale of development coming forward in Crawley is likely to strengthen it's position. Whilst the centre currently only attracts minimal trade from the District it remains easily accessible and as such improvements of the scale now proposed may attract 'higher order' trade from the district currently going to Brighton and Eastbourne.

EASTBOURNE

- 5.35 Located directly to the east of the District of Lewes, Eastbourne's primary catchment, spanning from Crowhurst in the east to Lewes in the west and as far north as Heathfield, is estimated to comprise in the region of 209,000 people. Linked to Brighton via the A27 and Uckfield to the north by the A22 Eastbourne is easily accessible from much of Sussex.
- 5.36 Town centre retail floorspace within Eastbourne is estimated to total some 99,000 sq. m. Of this, 29,000 sq. m. is located within the Arndale Centre, Eastbourne's only shopping centre. Opened in 1981 the centre is served by an adjacent multi storey car park and prominent tenants include, Marks and Spencer's and Boots. Elsewhere the centre has a strong representation of national retailers including Bhs, Co-op Department Store, Debenhams and Littlewoods.
- 5.37 There are no formal development schemes in the pipeline. However, the Council has recently issued a planning framework for the regeneration of Eastbourne Town Centre. The Council has identified that Eastbourne needs modern units in a size and configuration demanded by leading business in the retail sector, and is seeking a retail scheme which increases the total retail provision in the town centre by up to 26,600 sq. m. The Council expect that the development will provide for a new anchor department store, two or three other major space users together with a range of smaller shop units.

HAILSHAM

- 5.38 Hailsham is located to the east of the district, off the A22, which provides easy access to East Grinstead, and the M25 to the north, and Eastbourne to the south. The A22 bypasses Hailsham to the west.
- 5.39 The historic centre of Hailsham provides an attractive shopping environment that appears vital and viable. The Council's latest retail assessment (1999) highlights that the centre comprises 164 units, providing a total of 27,118 sq. m. of ground floor floorspace. The assessment concludes that whilst the centre has a comparison retailer provision comparable with the national average, the centre is under-represented by clothing and footwear retailers.
- 5.40 The principle comparison multiples in the town centre include Woolworths, Superdrug and Boots. These are located in The Quintins and Vicarage Fields, the centres key shopping areas. The majority of the other comparison retailers are independents selling a broad range of goods. The Council's previous retail study identifies this as major cause of the leakage of trade from the centre to higher order competing centres, most prominently Eastbourne.
- 5.41 The Co-op superstore opened in 1986 and has a total net sales area of 1,447 sq. m. It is centrally located in the town centre to the rear of The Quintins. The store has 11 checkouts and an easily accessible adjoining car park. The Somerfield store opened in 1996. The store has a total net sales area of 1,501 sq. m, 13 checkouts and an adjoining car park. It provides a reasonably attractive shopping environment, although the car parking provision is somewhat limited.
- 5.42 Currently the Council does not anticipate any major new development or expansion to the centre.

HAYWARDS HEATH

- 5.43 Haywards Heath is situated approximately 5 miles north of Burgess Hill, to the north east of the District of Lewes. Experian Goad highlights that the centre comprises a total of 31,958 sq m gross of ground floor floorspace for retail trade and services, comprising 213 units.
- 5.44 The Experian Goad assessment also highlighted that Haywards Heath has an above average representation of units occupied by retailers in the comparison and service categories. The number of comparison retail units is 7.9% above the national average, and the centre has a particular particularly high proportion of hardware and household goods, furniture, carpets and textiles, arts/crafts and stationers/copiers, charity shops and variety store operators. The number of units occupied by men's and women's clothing is in line with the national average. Of the 213 units, 92 (43%) are occupied by multiple retailers. This figure is above the national average of 34% and represents a strong vitality indicator for the centre.

- 5.45 The primary shopping frontage in Haywards Heath runs from the Sussex Square roundabout in the south to the Church Yard in the north along South Road. The Orchard Shopping Centre accessed via South Road is also part of the primary shopping frontage. The key retailers on South Road include The Link mobile phone shop, Boots the Chemist, WH Smith, Woolworths and Choices video rental. A number of banks are also located in the primary shopping frontages including Lloyds TSB bank, Barclays, Abbey, Halifax and HSBC. The larger retail units are located on the stretch of South Road between Sussex Square roundabout and the junction with Haywards Road; north of Haywards Road the retail units are significantly smaller with a more varied range of occupier. These include travel agents, computer equipment, charity shops, off licences, estate agents and haberdashery and household textiles.
- 5.46 The Orchard Shopping Centre opened in 1982 and has a retail floorspace of approximately 9,290 sq m gross. The part covered centre is located over one level and anchored by a Marks and Spencer with food store. The shopping centre has a range of national multiple retailers attracting shoppers including Superdrug, Boots, Clarks shoes, Dorothy Perkins, Accessorize and Julian Graves health food shop. The Centre currently has no vacant units reflecting the demand from retailers for space and the constrained nature of retail accommodation in Haywards Heath.
- 5.47 Town centre foodstore provision is limited. In addition to the Marks and Spencer Food Hall an Iceland foodstore is located on the junction of South Road and Haywards Road within the primary shopping frontage. A large modern Sainsburys superstore just outside the centre which is likely to serve the northern part of the district.
- 5.48 In the north of the town centre Victoria Park and the Church and Church Yard separate the primary shopping frontages on South Road with the secondary shopping frontages stretching along the Broad Way. This area of town is characterised by a number of restaurants and cafes including Café Rouge, Pizza Express, Viva Restaurant, Bar Boo Bar, The Orange Square Bar and Restaurant and The Canton Chef Chinese Restaurant.
- 5.49 Currently there are no development commitments or proposals in Haywards Heath. However, the Council is keen to strengthen the centre's role and as such they have allocated a prominent town centre location for a retail lead, mixed use, development.

TUNBRIDGE WELLS

- 5.50 Royal Tunbridge Wells is situated in West Kent approximately 30 miles from London, roughly 20 miles from the District of Lewes. Whilst the centres primary catchment area, comprising approximately 247,000 people, does not stretch as far as the district, the A26 provides a link direct from Lewes ensuring that Tunbridge Wells is easily accessible to residents within the study area.
- 5.51 Tunbridge Wells has a high quality retail offer for a town of its size, and retail floorspace within the centre totals 08,000 sq m. The centre has a good range of multiples and a number of key stores

including Marks & Spencer, Bhs, Fenwick, WH Smith, Boots, Next and Woolworths. The centre also has a good range of fashion retailers, ranging from mainstream operators such as Gap, Burton, Bay Trading and Oasis, to quality fashion retailers such as Hobbs and Monsoon.

- 5.52 The Council has identified a need for a substantial amount of additional comparison floorspace within the town centre and has identified four areas within the town centre where retail development would be appropriate. These sites include Market Square and Ely Court within Royal Victoria Place, which have been earmarked for possible future redevelopment to create an additional 9,300 sq m of comparison floorspace.
- 5.53 There is currently strong retailer demand to locate in Royal Tunbridge Wells, and the number of requirements has increased in recent years. In April 2000 Royal Tunbridge Wells had 90 requirements ranking the centre 37, and in October 2004 requirements had risen to 113 with an improved rank position of 35. A broad range of retailers have expressed an interest in the town, including: House of Fraser and TJ Hughes as well an extensive range of fashion/clothing retailers.
- 5.54 Further retail development within Tunbridge Wells will increase its appeal to residents within the District, especially those to the north.

UCKFIELD

- 5.55 Uckfield is a small town lying on the A22 Lewes to London main road. The town centre comprises a variety of shops, offices and other businesses. The most recent assessment by the Council highlights that Uckfield Town Centre is made up of 188 outlets, which provide a total of 35,991 sq. m. of ground floor floorspace.
- 5.56 The town centre has a total of 16 convenience goods retailers, the two largest of which are Tesco and Somerfield. The Tesco foodstore is located on Bell Farm Road, adjacent to the Civic Centre, and to the west of the High Street. The foodstore has a total net sales area of 1,840 sq. m. Located on the High Street, the Somerfield store opened in 1992 and comprises a net sales area of 11,130 sq. m. with surface level car parking for approximately 100 cars.
- 5.57 The principal comparison goods multiple retailers in the town centre include Boots the Chemist and Woolworths. These are located towards the southern end of the High Street in the core of the defined main shopping area. The majority of the other comparison goods retailers in the town centre are predominately independents selling a broad range of goods. As such the centre primarily functions as an everyday top up shopping destination for the local catchment population.
- 5.58 The Council is keen to strengthen retail provision within Uckfield the emerging Local Plan, identifies opportunities for new shopping development. An area to the east of the High Street, comprising a supermarket, a number of unit shops fronting the High Street, and a public car park, is now being

promoted for a comprehensive development, to include a new larger food supermarket, improved retail units at ground floor and increased residential and office accommodation at upper levels.

SUMMARY

- 5.59 The centres of Brighton and Eastbourne are the dominant 'higher order' comparison shopping centres serving the District. It is evident that the smaller centres, such as Burgess Hill, Hailsham, Haywards Heath and Uckfield are also in competition, with Lewes.
- 5.60 Currently only 33% of convenience retail expenditure is retained within the study area, whilst an even greater proportion of comparison expenditure is currently lost to destinations elsewhere. It is apparent that the centres within the District are not able to meet all of the requirements of local residents.
- 5.61 Eastbourne and Brighton alone account for 49% of the comparison expenditure generated within the survey area as a whole. A significant proportion of trade is also lost to the smaller centres located on the peripheries of the district, namely Burgess Hill, Haywards Heath and Uckfield. The three centres account for 10% of the comparison goods expenditure generated within the study area.
- 5.62 In terms of ranking, shopping floorspace, retail offer, retailer requirements and future developments we expect the majority of competing centres to reinforce their market share in future years. Significant investment is anticipated in the Brighton, Eastbourne and Crawley, whilst many of the smaller centres in the sub region are considering further retail lead development schemes.
- 5.63 The polarisation of retail activity into fewer, larger centres within the sub-region and the potential for neighbouring centres to improve their offer is likely to reduce the market share of Lewes and the other centres within the District without measures to improve their offer.

6. RETAILING WITHIN THE DISTRICT OF LEWES

6.1 Having examined the sub-regional context and identified the position of Lewes, Newhaven, Peacehaven and Seaford, relative to their main competitors, in this section we consider the role of each of the centres. Their provision is summarised below in Table 6.1:

Table 6.1: Retail Provision in the District of Lewes

Town	Gross Floor-space Sq m	Total Units	Multiple Units	Composition of Units			
				Conv	Comp	Service	Vacant
Lewes	37,717	244	58	18	137	71	14
Newhaven	10,869	81	19	8	37	26	11
Peacehaven	13,380	82	15	7	35	33	5
Seaford	25,500	177	37	17	87	60	10

6.2 Of the four centres, Lewes and Seaford are the largest by some margin. In terms of retail provision the smaller centres of Newhaven and Peacehaven, located only two miles from one another, are very similarly matched. Lewes serves the largest catchment, covering most of the District, while Seaford, Newhaven and Peacehaven essentially function as local centres, anchored by their convenience offer.

LEWES TOWN CENTRE

6.3 Lewes is the largest centre in the District and draws its trade from the largest catchment. It is an attractive, historic centre with a distinctive character. The main shopping provision runs east to west, along the High Street, the traditional focus of the centre, down Schools Hill into The Friars and onto Cliffe High Street beyond.

6.4 The centre contains 244 units, including 58 multiple retailers. The majority of these are located along The Friars, a pedestrianised thoroughfare linking the High Street to the west with Cliffe High Street to the east, known locally as "The Precinct." The only purpose built shopping provision in the town centre is the Eastgate Centre, anchored by a Safeway superstore. Other generally mid market multiples, including Argos and Woolworths, are set amidst higher quality independent retailing and service uses. The retail offer in this part of the centre is focused primarily on high order comparison

retailing, including Southdown Antiques, Sapphire Interior Decorations and Louis Potts who specialise in China and Glassware. On the first Saturday of every month a farmers market is held in the pedestrian precinct, a popular event that reinforces this areas role as the prime focus of economic activity.

- 6.5 A Tesco superstore is located approximately 500 metres to the west off The Precinct. Whilst this is located within the Town Centre, as defined by the adopted Local Plan, it is sited on the opposite side of the River Ouse, beyond the Phoenix Causeway dual carriageway and is divorced from the centre's primary retail frontages. The store provides a café, customer toilets and a delicatessen. Generally, the store appears busy and relatively cramped. Given the physical limitations of the site, opportunities to extend the store appear limited.
- 6.6 Lewes' only out-of-centre retail unit is the Homebase off Brooks Road, on the Mallings Brook Industrial Estate. Located in what appears to be a converted industrial unit, the store provides a poor retailing environment and does not appear to be well used. The store has little in the way of a retail frontage and there is only very limited commercial branding. Whilst some store car parking is provided this is very limited and tightly confined and the majority of customers have to park on the adjacent streets. Inside the retail environment is outdated and in need of refurbishment, whilst the range of goods are limited by the physical constraints of the building. The centre lacks any mainstream large electrical or DIY retailers.
- 6.7 To the west of the centre, Cliffe was traditionally a separate village and as such the High Street is defined by a less grand, yet unique, architectural style and is narrower than either the High Street or The Precinct. The bridge over the River Ouse, another of the centre's key attributes, acts as a gateway into what is effectively another distinctive quarter within the centre. Harvey's Brewery and the Riverside Brassiere are also prominent on the townscape at this point, which adds further to the character of this end of the centre.
- 6.8 Lewes is well connected to the local and regional road network. The A27 provides direct access to Brighton and Eastbourne, whilst the A26 links Lewes directly with Uckfield and Royal Tunbridge Wells beyond. Following the completion of the Brighton by-pass the centre also benefits from good road links to the M23 and the national motorway network beyond. The centre is on the direct rail link to Gatwick and central London, and there is also an east to west service linking the centre with Brighton and Eastbourne. This also serves Newhaven and Seaford.
- 6.9 Traffic detracts from the historic character of the centre in places. This is especially evident to the west of the centre, along the High Street, where bottlenecks cause congestion and queuing. The limited car parking provision within the centre compounds these issues. However, the indications are that Lewes is trading well and represents a vital and viable town centre. Only 5.75% of the total units within the centre were vacant at the time of the last formal assessment. This is much lower than the national average of 10.26%.

- 6.10 As of October 2004, 19 retailers had requirements to locate in the centre. These include mid market retailers like, Dorothy Perkins and Edinburgh Woollen Mill Ltd, and more specialist national brands such as Fat Face and Hawkshead. This does not allow for the requirements of independent retailers whose needs are not readily identified. The number of retailer requirements for the centre has steadily increased since 1997, suggesting that Lewes' fortunes have steadily improved during recent years. The centre serves an affluent catchment population, and benefits from its attractive, historic environment.
- 6.11 The key barrier to multiple retailers locating within the centre is the size and characteristics of the available units, which explains the limited presence of national brands currently within Lewes. In this respect the nature of the units available will have a significant bearing on the fortunes of the town centre. The only significant development opportunity within the centre is the Eastgate Centre. Previously the focus of an initial development proposal, the existing configuration does not represent an optimal use of this key site. Development in this location could help provide more mainstream units, reinforce the strength of the centre and maximise the usage of the adjacent Eastgate car park.

NEWHAVEN TOWN CENTRE

- 6.12 Newhaven Town Centre comprises a compact high street, running east to west and the Newhaven Square development to the eastern end. Secondary frontages are located either end of the High Street on South Way to the east and Bridge Street to the West. Currently the centre comprises a total of 10,869 sq. m of ground floor floorspace in 81 units.
- 6.13 The Newhaven Square precinct comprises a Somerfield food store and the town centre's main car park and as such effectively anchors the centre as a whole. Other operators within the Square include Peacocks Clothing and Barclays and Halifax Banks. The other notable retailers within the centre, Boots, Woolworths and Mckays, are located in larger units on the High Street. Elsewhere, the centre is made up of a number of independent, low order, comparison retailers and service providers meeting local needs. A street market is currently held twice a week within the centre which helps attract additional footfall, but concern has been expressed as to the quality of its offer.
- 6.14 In terms of other uses the library and the leisure centre are both key attractions within the centre. The library occupies a prominent location on the High Street, opposite the entrance to Newhaven Square. The Seahaven Pool and Gym, to the rear of Newhaven Square, is a strong draw within the centre. Representing a relatively modern leisure facility, including a gym and swimming pools, this appeals to a wider section of the local community and helps maintain footfall in the area throughout the day.

- 6.15 Outside the centre, at the Drove the Sainsbury's store has recently been redeveloped and extended, and Newhaven Retail Park, comprises B&Q, Carpetright, Halfords and Rosebys, and a McDonald's drive-through restaurant. The Retail Park is divorced from the town centre with little interaction between the two destinations apparent.
- 6.16 Development on Denton Island has helped improved the image of this area and helped improve its association within the town centre, whilst significant improvements have also been made to the public realm to the south west. Off Riverside North the West Quay development has introduced distinctive quayside housing and co-ordinated improvements to the physical environment.
- 6.17 Newhaven is located on the A259 and the A26 providing access to Brighton, Eastbourne, Lewes and the regional network beyond. However, the key route into the town centre along the swing bridge is frequently congested and causes long delays during peak times. Newhaven railway station is approximately 300m from the shopping area, although linkages with the centre are not strong. The bus service is impeded by ring road congestion and does not fully meet the needs of population, especially for cross town travel. The centre has ample parking provision. It's 240 spaces equate to one space per 13 sq.m. of town centre floorspace. However, the centre's main car park is the multi-storey facility within the Newhaven Square development, which is poorly configured and under used.
- 6.18 Overall the centre has a limited retail offer and as such it appears to be struggling to attract trade from outside the immediate area. The centre has a significant number of vacant units. The Somerfield unit appears to trade relatively successfully and underpins the centres convenience function. Beyond this, there are few complimentary convenience operators and much of the comparison provision is low order.
- 6.19 As of October 2004, Newhaven had 8 retailer requirements, which represents a significant enhancement since 2000 when only one operator had a requirement to locate in Newhaven. Interest from national operators includes requirements from Argos, Bon Marche, Cardfair, Superdrug and KFC. However, at the current time retailers will struggle to realise such requirements within the centre.

PEACEHAVEN TOWN CENTRE

- 6.20 Peacehaven has developed as a post war town and the Council identifies that many of the town's problems, including limited shopping provision and poor conditions on the main and local roads, stem from the centre's recent and rapid evolution. Located only two miles east of Newhaven, Peacehaven also suffers from the dominance of Brighton and Eastbourne.
- 6.21 There are two distinct areas of retailing activity within Peacehaven, The Meridian Centre and the South Coast Road. Within the Local Plan the Council have designated these areas as two, individual, town centres. The South Coast Road is identified as functioning, in places, as a traditional

high street, whilst when developed in the 1970's it was intended that the Meridian Centre would provide a range of town centre functions in one consolidated location.

- 6.22 In total, the two centres comprise 18,380 sq. m, within 82 units. Of these, 19 of the units are located in the Meridian centre, whilst the remainder are dispersed along the South Coast Road, approximately 1km to the south. Of the total 82 units only 15 (18.29%) accommodate multiple retailers. As such the centres fortunes are, to a large extent, dependent on a range of independent retail and service operators.
- 6.23 With the exception of the Co-op foodstore which anchors the development, the Meridian Centre is made up primarily of complimentary convenience uses, including a butchers and florists and a number of service uses, including a bookmakers, dry cleaners, opticians and café. The centre also supports a number of community facilities, including a library, community centre, Council Offices, Doctors Surgery and the Meridian Centre.
- 6.24 Peacehaven is only two miles west of Newhaven on the A259, providing direct links to Brighton and Eastbourne. There is ample surface car parking surrounding the Meridian Centre, much of which is poorly utilised. Along the South Coast Road Parking is difficult, limited primary to on street provision. This compounds congestion along this busy stretch of road and makes crossing the road problematic.
- 6.25 The Meridian Centre has a limited retail offer within an inferior shopping environment, relative to other local destinations, as appears to be struggling to attract trade. There has been relatively limited investment in the shopping centre and the surrounding environment and this appears to be compounding the centre's problems. The South Coast Road provides an unappealing retail destination, dominated by through traffic. As such it attracts only limited local, walk in trade. However, it successfully targets pass by trade and in this respect the various operators within this centre appear to be trading successfully.

SEAFORD TOWN CENTRE

- 6.26 Seaford Town Centre comprises a broad range of goods and services primarily serving a localised catchment. Retailing within Seaford is focused on Broad Street and Clinton Place/Sutton Park Road to the north, with secondary areas located along the High Street to the south and towards Safeway in the Church Street / Dane Street area.
- 6.27 The Town Centre comprises a total of 25,500 sq. m of ground floor floorspace for retail trade and services, within 177 units, making it the second largest centre within the district. The centre is characterised by a range of retail and service uses, and it has a higher than average proportion of convenience, comparison and service outlets. There are few vacant units within the centre, and very few of these are in the main retailing frontages.

- 6.28 In all 37 of the 117 units within the centre (20.97%) accommodate multiple retailers. The majority of the multiple retailers are located along Broad Street, which is made up of larger units. Towards the south there is a higher proportion of specialist independent retailers whilst to the north and towards the train station there are more service providers and A3 uses. The Safeway store to the west of the centre underpins its retail offer and, ensures significant footfall through Church Street, Dabe Road and Pelham Road.
- 6.29 The centre is located on the A259, South Coast Road mid way between Newhaven to the west and Eastbourne to the east, where the A26 and A22 respectively provide links to the surrounding area. Seaford is located on the train line with regular services to Eastbourne and Newhaven and Lewes to the west. Located on the western edge of the town centre, the train station is easily accessible from the town centre. Bus services provide regular links along the A259 to Eastbourne to the east and Newhaven and Lewes to the west.
- 6.30 Only four operators had requirements to locate within Seaford as of October 2004, suggesting little scope for new development. In any event, the centre is tightly developed such development opportunities are limited. However, in contrast to the smaller centres of Newhaven and Peacehaven Seaford appears to be performing well.

SUMMARY

- 6.31 The main centres within the District of Lewes are located within the catchment areas of Brighton and Eastbourne. Both are strong centres, which are likely to improve their retail offer, and will continue to meet most of the 'higher order' comparison shopping needs of the District.
- 6.32 Lewes contains a mix of multiple convenience and comparison retailers, anchored by a somewhat dated Safeway store. Its main strengths are its attractive, historic environment and specialist/niche retailing. It has a low vacancy rate and improving demand, but is congested and with the exception of the Eastgate Centre, there are limited opportunities for any significant new retail development.
- 6.33 Newhaven has a limited retail offer and appears to be struggling to attract trade from outside its immediate catchment. The Somerfield store is successfully serving a localised convenience function, but the rest of the centre appears to be underperforming and much of the comparison provision is low order. If the vitality and viability of the centre is to improve then it is apparent that it needs to attract more people from the local catchment and to capture more visitor spend.
- 6.34 There are two distinct areas of retailing activity within Peacehaven; The Meridian Centre and the South Coast Road. The Meridian Centre offers only a limited offer within a poor shopping environment, and appears to be struggling to attract trade. The South Coast Road provides an unappealing retail destination, dominated by through traffic and attracts only limited local, walk in

trade. However, it does attract pass by trade and in this respect this centre appears to be trading successfully.

- 6.35 Seaford appears to trade successfully in the face of growing competition from Eastbourne. Its retail offer is underpinned by Safeway, and whilst the centre primarily serves a localised catchment, and has little potential for growth, it appears a viable, stable centre.

7. SCOPE FOR RETAIL DEVELOPMENT

7.1 This section examines the current turnover of Lewes, Newhaven, Peacehaven and Seaford and the need for additional convenience and comparison floorspace in the District through to 2021.

7.2 We have used a conventional and widely accepted step-by-step methodology drawing on the results of the telephone survey to model the existing flows of available expenditure to each retail destination. To summarise we have completed the following steps:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas within the District of Lewes;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the Household Telephone Survey of Shopping Patterns, so as to provide estimates of current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace, to assess sales densities in each shopping destination.

7.3 Once we have established this baseline position, we have explored the capacity for further retail floorspace, having regard to the performance of existing facilities and where appropriate, the potential to change the patterns of market shares to support new development. The capacity tables are set out in Appendix 5 and 6.

ESTIMATES OF POPULATION IN THE SURVEY AREA

7.4 Population estimates and forecasts derived for each of the survey zones were prepared from GVA Grimley's in-house E-marketer system (Experian Business Solutions). This provides estimates of population from 2005 through to 2016 and is based on the 2001 census data for small, localised areas. In order to provide an assessment through to the end of the development plan time period we have applied these trends to calculate likely expenditure to 2021.

7.5 When interpreting the resulting floorspace capacity assessment we would urge caution regarding the reliance which can be placed on long term projections, especially those beyond 2016. PPS6 states that in assessing the need for additional floorspace developers should not look more than five years ahead. Given the dynamic nature of the retail sector, we recommend these capacity projections are regularly monitored and updated.

7.6 Overall, the population within the survey area, as illustrated on Plan 1, is currently 183,844. It is forecast to rise to 188,555 by 2009, 190,181 by 2011 and again to 194,213 by 2016; a growth rate

within the survey area of 3% through to 2009, rising to 6% to 2016. The main concentrations of population are in the four key towns of Lewes, Newhaven, Peacehaven and Seaford. The rest of the District is rural in character and as such the District's population is relatively sparse.

AVAILABLE EXPENDITURE IN THE STUDY AREA

- 7.7 The Experian E-Marketer system also provides estimates of per capita expenditure within the survey area for convenience and comparison goods, at a 2003 price base. We have made deductions for special forms of trading which represents expenditure not available to spend in shops. We have applied uniform per capita expenditure figures across the survey area.
- 7.8 To forecast expenditure growth in the District, we have used the ultra long term convenience and comparison goods growth rates provided by Experian Business Solutions. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase more non-food products. Experian Business Solutions estimate a convenience goods growth rate of 0.4% and a comparison goods growth rate of 4.1% per annum. A 4.1% growth rate may be regarded as a conservative having regard to recent trends, although the effects of 'retailing' and possible slowdown in consumer spending suggest that this rate remains appropriate for long term forecasting.
- 7.9 Convenience goods expenditure generated in the study area currently totals £293.39 million. It is forecast to increase to £305.32 million by 2009, and to £322.62 million by 2016. Currently only 33%, or £98.65 million is retained within the District of Lewes. Comparison goods expenditure currently generated within the study area currently totals £544.25 million and this is forecast to grow to £650.43 by 2009 and to £878.22 million by 2016. Currently, only 11.5% or £62.54 million, is retained within the District.

FLOORSPACE DATA

- 7.10 The comparison and convenience goods floorspace data used in our modelling has been derived from the Institute of Grocery Distribution (IGD), Lewes District Council and the EGI shopping centre database. Our floorspace assumptions for foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace, we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

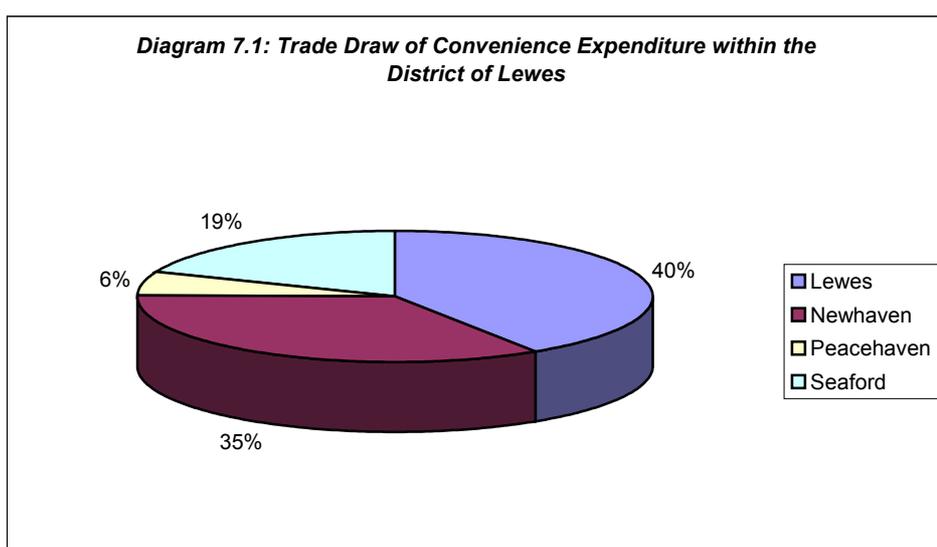
TRADE DRAW

- 7.11 Using the Household Telephone Survey, we have modelled the existing trade draw and turnover of the retail facilities within the District of Lewes.

- 7.12 To put the turnovers of the town centres and the individual stores in context, we have assessed these against company averages where available. It should be noted that in relation to foodstores, the company average used is a business based model and includes both convenience and comparison goods. Caution should therefore be taken in comparing these figures with the convenience turnover of stores, as the sales density per sq. m. will be higher for convenience goods than comparison goods.
- 7.13 Our findings are based on current market shares, established through the household survey. Given that respondents provided details of the centre they most often visit, a survey of this nature is likely to favour larger centres and as such may under represent the trade draw of smaller centres. Equally the survey does not allow for expenditure within each centre that comes from outside the study area. As such this methodology may underestimate both trade draw throughout the study area and expenditure inflows.

CONVENIENCE RETAIL TRADE DRAW WITHIN THE DISTRICT

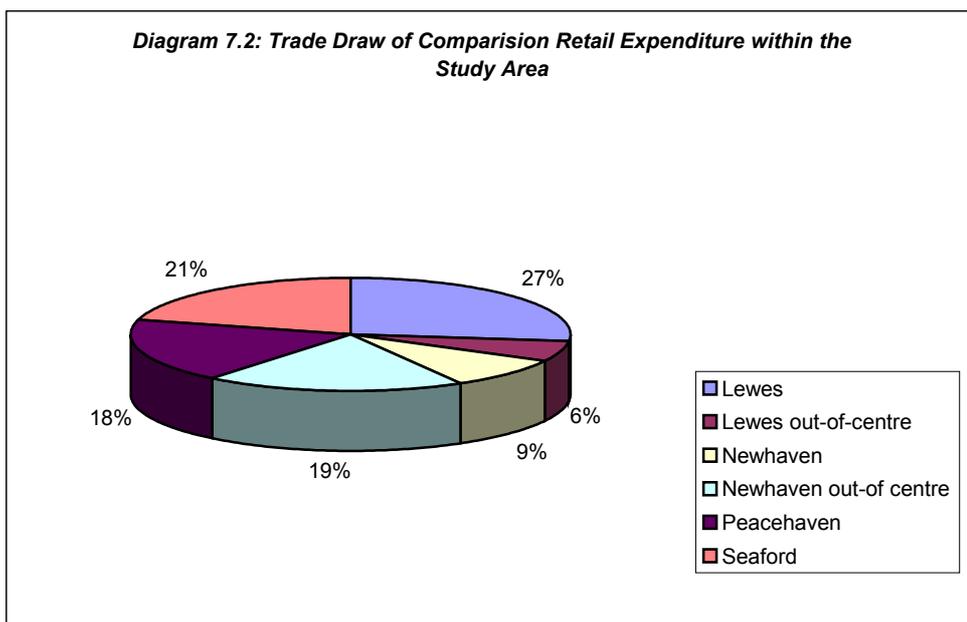
- 7.14 Of the convenience trade retained within the District, which totals some £98.65 million, the highest proportion, 41%, goes to stores within Lewes, primarily the Tesco and Sainsbury's stores, as highlighted in diagram 7.1 below. The remaining 59% of expenditure is retained within the three centres to the south of the District, Peacehaven, Newhaven and Seaford.
- 7.15 Of the coastal towns, Newhaven is the most popular destination, due to the 5,459 sq. m Sainsbury's store at The Drove. Of the £33.59 million attracted to Newhaven 77% goes to the out-of-centre Sainsbury's store. The town centre is capturing little of the available expenditure and the Somerfield store which underpins Newhaven Town Centre attracts only 22% of the convenience spend within Newhaven.



- 7.16 Seaford captures 18.8% of the expenditure retained within the District, primarily due to the appeal of the Safeway Store on Dane Road. Peacehaven struggles to attract convenience expenditure from within the catchment. Whilst the Co-op supermarket within the Meridian Centre accounts for 91% of the convenience spend within the town, it captures only 5% of the total expenditure retained within the study area. It is evident that the Co-Op store performs more of a top-up function and does not meet many residents requirements for food shopping.
- 7.17 It is essential that each of the centres within the District is anchored by a strong foodstore which is able to underpin each centres function i.e. to meet the day to day needs of the local population. It is evident that Lewes and Seaford both benefit from having successful foodstores, which are able to attract local trade. However, the food stores in Newhaven and Peacehaven struggle to capture local trade, which has impacted upon the fortunes of both centres.

COMPARISON RETAIL TRADE DRAW WITHIN THE DISTRICT

- 7.18 Lewes attracts 33.3% of the expenditure retained within the study area; 27.45% is spent within the town centre and the remainder is spent within the Homebase unit on the Mallings Brook Industrial Estate.
- 7.19 The next most popular comparison-retailing destination within the District is the Retail Park in Newhaven, which attracts 19.23% of the total expenditure retained within the study area, compared with Newhaven town centre which currently only attracts 9% of expenditure retained within the area. The Retail Park does not compete directly against operators in the town centre, but it clearly overshadows its limited comparison retail offer.
- 7.20 Seaford is the second most popular town centre within the District, attracting 18.8% of the comparison expenditure retained within the study area. It is evident from the nature of the retailers within the centre that Seaford is geared primarily towards meeting the needs of the immediate catchment and the survey results would suggest that it is successfully fulfilling this role. Peacehaven is the least appealing centre to local residents, drawing only 5.79% of expenditure retained within the study area.



Source: GVA/NEMS survey

LEWES

Convenience Goods

- 7.21 Table 3 in Appendix 5, indicates the trade draw of the main convenience goods shopping destinations within the town. The analysis highlights that Lewes' convenience goods trade draw is relatively self-contained. The highest trade draw is from zone 12 which encompasses Lewes, and the adjacent zones, 5,8 and 9, to the east.
- 7.22 Tesco is the key convenience operator, accounting for 75% of the convenience expenditure within the centre. In total we estimate that the store has a total turnover of approximately £29.5 million, which equates to a sales density of circa £15,374. Compared to an estimated average sales density for Tesco nationally of £11,459 per sq. m this suggests that the store in Lewes is trading significantly higher than average levels.
- 7.23 Trade draw to Safeway is considerably weaker. Beyond Zone 12, Safeway's has limited influence. On this basis, we estimate that Safeway's turnover currently totals in the region of £7 million. This equates to a sales density of approximately £5,183 per sq.m, which, when compared to Safeway's average sales density of £8,942, per sq. m would suggest that the store is performing below company average. This reflects the commercial advantages of the Tesco store, including the provision of convenient car parking next to the store.
- 7.24 We estimate that the other convenience retailers within the town centre attract only £2.7 million from within the study area. Most of the trade for the independent retailers comes from within Lewes itself,

beyond the town centre penetration rates through the rest of the district are very weak. A total turnover of this order would suggest that retailers within the centre turnover at, on average, approximately £1,700 per sq. m. Having regard to the health check assessment of Lewes and the nature of the retailers present within the centre, we would expect this figure to be higher, potentially in the region of £3,000 - £3,500 per sq. m. However, our survey is likely to have underestimated the market share of the specialist convenience retailers in the centre.

- 7.25 We anticipate that the convenience goods spend within Lewes, which currently totals £39.42 million, will grow by to £43.71 million by 2016, and to £45.42 million by 2021. Primarily as a result of over trading at the Tesco store, it is anticipated that expenditure will exceed the sales capacity of the existing convenience floorspace in forthcoming years, which will generate surplus expenditure of circa £1.3 million by 2009 and £3.72 million by 2011. This could support up to a further 162 sq. m by 2009, growing to 457 sq. m. of convenience floorspace by 2016.
- 7.26 Whilst this suggests limited scope for additional floorspace, the cramped conditions within the Tesco store and shortcomings of the outdated Safeway suggest there would be scope to accommodate a replacement quality foodstore in the town centre if a suitable opportunity for a well integrated new store can be identified.

Comparison Goods

- 7.27 Current market shares indicate that comparison retailers within Lewes Town Centre generate an annual turnover of £20.85 million from within the study area. This is forecast to grow to £30 million by 2021, and £36.35 million by 2021. This equates to a sales density across the centre of £1,514 per sq. m, which is considerably lower than we would expect for a town of Lewes status.
- 7.28 We are currently undertaking a retail study in Mid Sussex which has established that the sales densities in the nearby centres of Haywards Heath and Burgess Hill are £4,054 and £6,174 per sq. m respectively. We consider that Lewes is of a similar nature to these centres and would anticipate that in practice the sales densities in Lewes are likely to be circa £4000 per sq. m. This would suggest that the survey has underestimated the market share of the many specialist/niche retailers in the centre, and/or many retailers within the centre are dependent upon trade from outside the study area.
- 7.29 As the survey data is likely to have underestimated the actual turnover of comparison retailers in Lewes, it is difficult to give robust estimates of future capacity. Despite the level of growth in comparison spending forecast in the study area, the capacity for new floorspace would be very limited based on the implied market shares. Even assuming the centre achieves a higher market share than our survey suggests the quantitative need for additional comparison shopping floorspace is limited.

- 7.30 In practice, the most significant factor likely to influence the scope for new floorspace in the centre is the potential to identify a suitable development opportunity, which is capable of accommodating, identified retail demand. Without new development, we anticipate the market share of the centre is likely to fall as its competitors expand. With new development and other improvements to the accessibility and convenience of the centres there is likely to be capacity for some modest additional comparison shopping floorspace in the centre.
- 7.31 Having regard to out-of-centre provision it is evident that the Homebase unit on the Mallings Brook Industrial Estate struggles to attract trade from outside the town. The Homebase unit is an outdated store with a limited retail offer and as a consequence the Homebase unit has an annual turnover of just £3.68 million, equating to a sales density of £1,472 per sq. m. considerably lower than the company's average sales density of £3,758 per sq. m. In this respect it is evident that residents in the District travel to more modern DIY stores elsewhere.
- 7.32 Similarly there are no large scale electrical retailers within the centre and consequently residents are instead travelling to facilities outside the District. As such, there is likely to be scope for new retail units to sell DIY and/or electrical goods provided they improve the centres retail offer and strengthen the centres wider retailing function.

NEWHAVEN

Convenience Goods

- 7.33 As a whole Newhaven generates a convenience turnover of £33.59 million, 34% of the total expenditure retained within the District. This is anticipated to grow to £37.17 million by 2016. It is evident that the trade within Newhaven is relatively self contained, coming primarily from the four adjacent zones, 3,4,5 and 6. Sainsbury's is the main attraction within Newhaven, accounting for 77% of the convenience spend in the town.
- 7.34 As a result of its prominence within Newhaven, we estimate that the Sainsbury's store at the Drove currently generates an annual turnover of £25.93 million, equating to a sales density of £9,081 per sq. m. This suggests the store is moderately under trading relative to the company's average sales density of £10,383. Of the remaining 23% of convenience goods expenditure within Newhaven the Somerfield store in Newhaven Square accounts for 22%. This store underpins the centres convenience retail offer with a turnover of £7.56 million. This equates to a sales density of £5,739, which when compared to the companies average sales density of £4,670 suggests that the store is performing relatively strongly. In this respect convenience retailing within the town centre appears robust. However, there are few independent convenience stores to compliment the Somerfield unit and with a combined turnover of just £116,000 it appears that these operators are not performing strongly.

- 7.35 Table 16 of Appendix 5, examines the future capacity within Newhaven for additional convenience goods floorspace. Despite Somerfield's performance, the Sainsbury's unit currently trades under capacity and as such there is currently an expenditure deficit within Newhaven as a whole. However, it is evident that the Somerfield store is overtrading, despite the restraints of the store and, we consider there is likely to be scope to support an extended/replacement quality foodstore in the town centre if a suitable site can be identified.

Comparison Goods

- 7.36 In terms of comparison retailing, provision in Newhaven is split between the town centre and the competing out-of-centre facilities on the Newhaven Retail Park, comprising a B&Q, Carpet Right, Halfords and Rosebys. Comparison retailers within the town centre struggle to attract trade from outside Newhaven. We estimate that the centres annual turnover currently amounts to £5.63 million and anticipate that this will grow to £8.68 million by 2016. On this basis, the comparison goods retailers within the town centre currently generate £1,694 per sq. m, which is lower than we would expect for a town of this size.
- 7.37 In contrast we estimate that the Newhaven Retail Park currently generates £12 million a year, equating to an average sales density of £2,361 per sq. m, which compares favourably to an average sales density for the four operators of £1,631 per sq. m. The Retail Park is performing strongly and is a key comparison goods retail destination within the District.
- 7.38 Total comparison goods expenditure within Newhaven totals £17.65 million and this is anticipated to grow by over £18 million to £35.97 million by 2021. On this basis we anticipate that expenditure will exceed the sales capacity of existing floorspace within forthcoming years. Taking existing sales densities, we anticipate that this level of surplus expenditure could support up to 1,344 sq.m of additional floorspace by 2009, growing to 4,193 sq. m by 2016.
- 7.39 The extent of surplus expenditure to be generated is primarily a result of the strength of Newhaven Retail Park. The surplus expenditure could help reinforce existing floorspace in the town centre or, in the long term, support some modest additional town centre floorspace although it is more likely that Newhaven Retail Park will remain the focus of activity.

PEACEHAVEN

Convenience Goods

- 7.40 Convenience retailing within Peacehaven comprises primarily the Co-op supermarket in the Meridian Centre along with additional smaller stores located in both the Meridian Centre and along the South Coast Road. As a whole Peacehaven generates a convenience retail turnover of just £5.6 million, which represents a market share of only 1.5%.

- 7.41 We estimate the Co-op foodstore generates a turnover of £5.12 million, which equates to 85% of Peacehaven's total convenience turnover. The store's trade comes from a localised catchment, 76% of its turnover coming from within zone 3. A limited number of customers are drawn from the adjacent zones, but beyond this the store's trade draw is negligible. On this basis, we estimate the store generates a sales density of £2,376 per sq. m, which is considerably lower than the company's average sales density of £5,046. This would suggest that although the store underpins the convenience foodstore offer within the centre, it is under performing relative to company expectations.
- 7.42 The survey highlights that the other convenience stores within Peacehaven have a similarly poor market share beyond the immediate catchment. We estimate that cumulatively these stores generate an annual turnover of £0.49 million, equating to a sales density of just £627 per square metre. However, the survey results will favour the larger stores and as such will not reflect the pass by trade, especially important to retailers on the South Coast Road.
- 7.43 The under performance of the existing convenience goods retailers in Peacehaven suggests there will be no quantitative need for additional floorspace in either part of the centre based on current market shares. However, we consider there is a clear qualitative need for imperial convenience provision, and there would be scope, in expenditure terms, to extend/redevelop the main food offer in the Meridian Centre based on the potential to increase market shares within Zone 3 given the right scale/quality of development.

Comparison Goods

- 7.44 The comparison retail offer is made up of a number of small-scale, primarily independent, operators. It is evident from the survey that the majority of respondents visit the centre to purchase goods from the bulky goods operators to the east of the South Coast Road. We estimate the combined turnover of Peacehaven is £11.15 million, and is anticipated to grow to £22.68 million by 2021. This equates to an average sales density of £3,768 per sq. m.
- 7.45 We anticipate that Peacehaven's current market share, will generate up to £1.14 million of surplus expenditure by 2009, which will grow to £6.14 million by 2021. In theory, this could support up to 1,985 sq. m of additional comparison retail floorspace in Peacehaven, but in practice the limited demand, and effects of the competition from stronger centres suggest that the scope for new comparison floorspace in Peacehaven is likely to be limited to a modest extension/redevelopment of the Meridian Centre, underpinned by an improved foodstore.

SEAFORD

Convenience Goods

- 7.46 Seaford's convenience retailing offer is made up of the Safeway Supermarket off Dane Road, the Co-op store on Shepway Parade and numerous other smaller retail units throughout the centre. We estimate Seaford generates a convenience retail turnover of £19.20 million, representing 6.5% of the total convenience expenditure available within the district.
- 7.47 Currently the Safeway Store generates a turnover of £16.45 million. The store is the dominant convenience draw within the centre, accounting for 86% of the towns total convenience turnover, but struggles to draw trade from beyond Seaford. The current turnover of this store equates to a sales density of £10,652, which when compared to an average sales density of £8,942 for Safeway stores generally, would suggest that the store is trading well.
- 7.48 We estimate that the other stores within the centre generate a cumulative turnover of £2.76 million, which equates to a sales density of £2,570 per sq m. Given it's localised role this shows that the local shops within the centre are performing well. With additional spending from visitors it is anticipated that this is more likely to be in the region of £2,750 - £3,000 per sq m which is more in keeping with what we might expect a centre of this nature to generate.
- 7.49 Total convenience expenditure in Seaford is anticipated to grow from £19.20 million to £20.35 million in 2021, whilst in the same time period the sales capacity of existing floorspace is only likely to reach £17.88 million. The resulting surplus could support in the region of 256 sq. m of additional convenience retail floorspace by 2009, growing to 361 sq. m by 2021.
- 7.50 On this basis, we do not consider there is capacity for any significant scale of additional convenience goods floorspace, but there is scope to extend the Safeway store and/or support additional small scale qualitative improvements to the current offer.

Comparison Goods

- 7.51 The comparison retail offer within Seaford Town Centre is made up of a number of small scale retail operations. We estimate that comparison retail expenditure within Seaford currently totals £12.90 million, which equates to an average sales density within the centre of £1,582 per sq. m. This is low compared to nearby centres and is lower than we would expect for a centre of this nature. We would anticipate stores within a centre of this nature to be achieving a turnover in the region of £2,500 - £3,000 per sq m. This may be because the market shares generated by the survey do not account for visitor spend.

- 7.52 Comparison goods expenditure within the centre is estimated to grow from £12.90 million to £24.75 million by 2021. This could generate up to £1.05 million in residual expenditure by 2009 and £5.6 by 2021, but in practise the impact of planned growth in larger centres, and limited scope for new comparison retail development suggest that there is no need for new comparison retail development in Seaford during the lifetime of the LDF.

Local Shops

- 7.53 It is evident from the Household Survey, which established that 72% of residents use local facilities, that local shops form an important focus for local communities.
- 7.54 Notwithstanding this, as identified in Section 4, local services have declined in recent years. Larger centres are becoming more dominant as people living in small towns and rural areas travel to more larger shopping centres instead of relying on more local facilities. On this basis we expect the demand from local shops and services to continue to decline in forthcoming years.

SUMMARY

- 7.55 Of the £98.65 million of convenience expenditure retained within the District, the highest proportion, 41%, goes to stores within Lewes. The remaining 59% of expenditure is retained within the three centres to the south, Peacehaven, Newhaven and Seaford. It is evident that Lewes and Seaford both benefit from having successful foodstores, which are able to attract local trade. However, the food stores in Newhaven and Peacehaven struggle to capture local trade, which has impacted upon the fortunes of both centres. It is important that each of the centres within the district is anchored by a strong foodstore, which is able to underpin each centres function.
- 7.56 Only 11.5% of the comparison goods expenditure generated within the study area is currently retained within the District, and it is evident that all four centres struggle, to varying degrees, to retain expenditure in the face of competition from higher order centres. As a result of its size and the range of goods and retailers within the centre, relative to the coastal towns to the south, Lewes attracts the greatest proportion of comparison goods expenditure within the district.
- 7.57 In Lewes, we have identified some limited capacity for additional convenience goods floorspace, as a consequence of the strong performance of Tesco. This would support the extension/redevelopment of the outdated Safeway store which anchors the town centre, provided such a development was able to compete effectively with Tesco in terms of size, convenience and parking.
- 7.58 Capacity for further comparison floorspace is limited. There is potential for new development to capture some of the forecast expenditure growth, and increase the centres market share within its affluent catchment. However, the main constraint is the shortage of large, modern retail units in the town and limited new development opportunities.

- 7.59 There is no quantitative need for new convenience retail floorspace generally within Newhaven, and as such in order to strengthen the town centre the Council should resist any further expansion to the Sainsbury's store. It is evident that the Somerfield store is overtrading despite the restraints of the outdated unit, and there is scope to support the extension/redevelopment of this store. We consider there is unlikely to be any significant capacity for further comparison retail floorspace in the centre.
- 7.60 Within Peacehaven the majority of convenience goods floorspace is under performing and as such we do not anticipate that there will be any quantitative capacity for additional convenience floorspace within the centre during the lifetime of the Local Development framework. However, if the Meridian Centre is to provide the range of functions required to meet the needs of the local community then there is a requirement for an improved foodstore offer which could be supported based on the potential to increase the centres low market shares.
- 7.61 Convenience retailing in Seaford is anchored by the Safeway store, which is currently trading close to capacity. There is only very limited expenditure capacity for new floorspace within Seaford generally, however given that the store is currently overtrading there is likely to be a qualitative need for improvements to the store in forthcoming years. There is likely to be limited capacity in quantitative terms for significant new comparison retail development within Seaford through to 2021.

8. LEISURE

8.1 This section reviews the existing distribution of leisure facilities within the District of Lewes, focusing on town centre and other activities in the wider catchment area including cinema, theatre, health & fitness, restaurants and nightclubs.

8.2 There is no robust methodology for forecasting capacity for specific forms of leisure development because new leisure formats are continually evolving, fuelled by the factors described in section 4. However, to provide an indication of the needs generated by residents within the District we have examined current and forecast growth in leisure expenditure. We have also undertaken a broad capacity analysis for additional health and fitness units, but these exercises should be treated with caution, and used only as a guide to the capacity likely to be available. For these reasons significant weight should also be placed on qualitative factors when assessing the need for leisure facilities.

LEISURE EXPENDITURE

8.3 The Experian E-marketer Report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services, based on the demographic profile of the catchment area. Leisure expenditure as defined by Experian includes expenditure on recreation and sporting services, cultural services, games of chance and bars/restaurants.

8.4 We have taken the base position and projected available expenditure per capita forward to, 2007, 2009, 2016 and 2021, assuming an ultra long term growth rate in available expenditure of 2% per annum. Thus ultra long term growth rate for expenditure on leisure goods is derived from Experian Business Solutions. On this basis consumer leisure expenditure per capita is expected to grow within the district by £403 from 2005 to 2016 and by a further £215 in the following five years, to total £2,275 by 2021.

8.5 Total leisure expenditure in the study area currently totals £304 million and is anticipated to grow by nearly £95 million to £400 million by 2016 and a further £51 million to £451 million by 2021.

8.6 This assessment highlights significant growth in available leisure expenditure within the District through to 2021, which will generate significant demand for additional leisure facilities.

EXISTING LEISURE PROVISION

8.7 GVA Grimley have undertaken detailed on-site surveys of existing leisure provision throughout the district to inform our assessment of leisure needs. Tale 8.1 highlights the leisure composition within each of the district's four key centres by number of units.

Table 8.1: Existing Leisure Provision in the District of Lewes

Leisure Uses	Lewes	Newhaven	Peacehaven	Seaford
	No.	No.	No.	No.
Public Houses / Bars	11	4	2	8
Restaurant	13	5	3	10
Theatre	2	0	0	2
Bingo	0	0	0	0
Take Away	6	4	4	4
Cafes	6	1	2	6
Health & Fitness Club / Gym	4	1	1	3
Cinema Facilities	1	0	1	1
Total	44	15	13	32

Source: Goad Town Centre Surveys; GVA Grimley fieldwork.

HOUSEHOLD TELEPHONE SURVEY

8.8 In order to inform our qualitative review of existing leisure provision, we have drawn on the results of the Household Telephone Survey undertaken throughout the district. The survey sought to determine leisure patterns of households and included six questions asking respondents where they go most often for the following leisure activities.

- Restaurants;
- Bars / Nightclubs;
- Gym / Health and Fitness Clubs;
- Cinema;

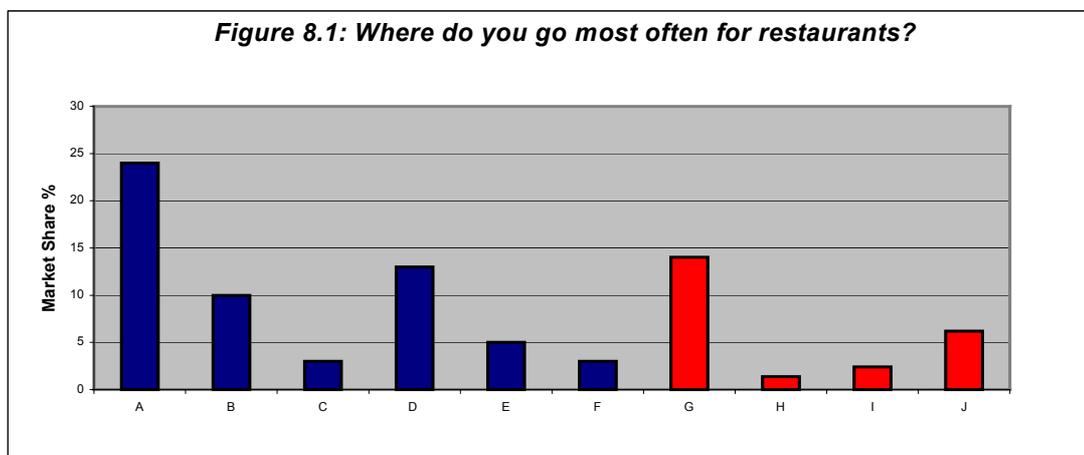
- Bingo;
- Theatre

8.9 We highlight the most popular destinations amongst the District's residents below, and consider the extent to which existing leisure provision is satisfying the needs of the catchment area.

Restaurants

8.10 Leisure facilities throughout the District are predominately limited to either food establishments or bars/public houses. Restaurants form the mainstay of leisure provision within Lewes, with a variety of establishments located throughout the centre, although it is evident that a number of more contemporary establishments have started to develop along Cliffe Street to the east of the main thoroughfare.

8.11 Provision within Peacehaven is limited to a handful of fast food restaurants along the South Coast Road whilst in Newhaven and Seaford there is a mix of low/medium order restaurants and fast food take-aways. 759 respondents to the survey confirmed that they visit restaurants as an evening leisure activity. The most popular destinations are highlighted below, in figure 8.1.



- A: Brighton Town Centre
- B: Brighton Marina
- C: Burgess Hill Town Centre
- D: Eastbourne Town Centre
- E: Haywards Heath Town Centre

- F: Uckfield Town Centre
- G: Lewes Town Centre
- H: Newhaven Town Centre
- I: Peacehaven Town Centre
- J: Seaford

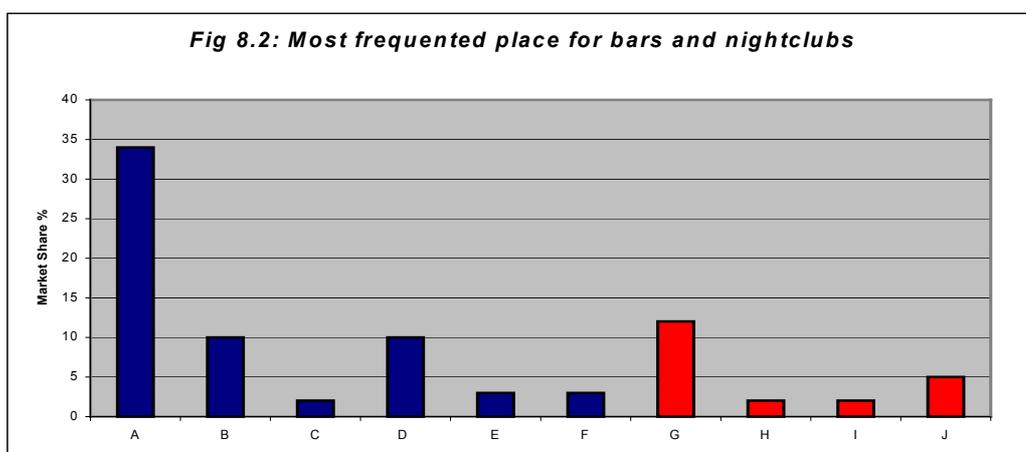
8.12 Brighton is the most popular destination to visit restaurants attracting just over 18% of respondents. The restaurants, at Brighton Marina are also popular, Eastbourne attracts a 10% of the available market within the survey area. With a market share of 10.9%, Lewes is the second most popular

destination. Seaford accounts for 4.8% of the market, whilst Newhaven and Peacehaven each accounts for less than 2% of respondents.

- 8.13 58.1% of respondents from within zone 12 identify Lewes as their main destination for eating out. The centre also benefits from a significant share of the market in zones 2,5,8 and 9. This accords with the qualitative findings, which confirm that Lewes has the best provision of eating establishments in the District. It is evident that Lewes should seek to build upon this strength.

Bars / Nightclubs.

- 8.14 Drinking establishments in Lewes are primarily limited to more traditional public houses, which are located along the High Street down to Cliffe High Street. Evening based activities in Newhaven are focused around a handful of public houses and the Liberty bar/night-club at the top of the High Street. Provision within Peacehaven is limited to several public houses on the South Coast Road. While Seaford contains a range of pubs the majority of these are more traditional establishments. However it is evident that more contemporary facilities, aimed more towards a younger catchment, are appearing within the centre. Currently there is one night-club in the town know as The Trek. The vast majority of these facilities are aimed at the evening economy with very few operators focusing on the daytime business/visitor market.
- 8.15 In all 386 residents confirmed that they visit bars and nightclubs. Fig 8.2 below highlights the most popular destinations. It is evident that Brighton is the most prominent destination within the locality. Brighton City Centre attracts 13.3% of respondents, whilst operators at the marina draw a further 3.3%, which means in total Brighton has a market share of 44%. As with restaurants, Lewes is the second most popular destination for such activities. 47 respondents indicated that they regular visit the pubs/bars etc in Lewes, a market share of 12%.



A: Brighton Town Centre

B: Brighton Marina

C: Burgess Hill Town Centre

D: Eastbourne Town Centre

E: Haywards Heath Town Centre

F: Uckfield Town Centre

G: Lewes Town Centre

H: Newhaven Town Centre

I: Peacehaven Town Centre

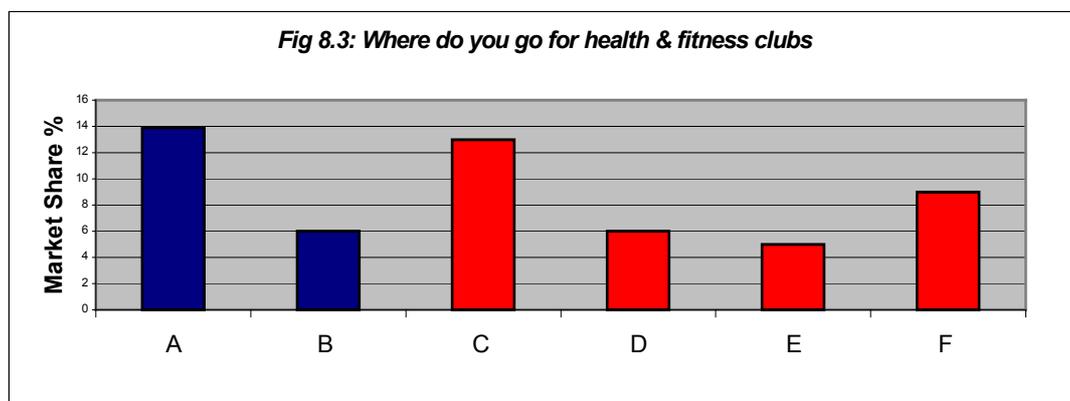
J: Seaford

- 8.16 A more in depth look highlights that Brighton attracts residents from throughout the District, whilst again Eastbourne has the greatest influence over the areas to the east of the District. The greatest proportion of the trade attracted to Lewes Town Centre comes from within zone 12, however beyond this it draws trade primarily from the north of the District, whilst to the south Brighton and Eastbourne are more popular destinations.
- 8.17 Seaford accounts for 5% of the market within the district, and the vast majority of its trade comes from within zone 6. Newhaven and Peacehaven have a very minor share of the market, relying almost extensively on local trade.
- 8.18 Each of the centres has a reasonable range of bars/public houses given their size and catchment.

Indoor Health & Fitness Facilities

- 8.19 There is a range of health and fitness facilities throughout the District. There are four establishments within the Lewes catchment, three of which are small-scale independent facilities. At the current time the centre has little in the way of mainstream health and fitness provision. Lewes Leisure Centre, comprising a gym, swimming pool and several sports halls, is a popular facility, but is located to the south of the town and has no links with the town centre.
- 8.20 In Newhaven, the Seaford Leisure Centre provides the town's sole daytime leisure destination. Situated directly adjacent to Newhaven Square, the Council owned facility comprises a gym alongside two swimming pools, a 25m pool and 10m teaching pool. The leisure centre is an important family orientated leisure facility close to the town centre.
- 8.21 The Meridian Leisure Centre represents the main leisure facility within Peacehaven. Comprising a wide range of recreation facilities including, a gym, a 4 court sports hall, squash courts and a sauna and sunbed suite the centre represents a well equipped family orientated sports facility. The facility attracts a number of visitors and as such is vital to ensuring the continuing vitality and viability of the Meridian Centre.

- 8.22 There are three health and fitness facilities within Seaford. Sculptures Gym is the only private enterprise within the centre and situated on the peripheries of the centre. Similarly to other centres within the District however none of the more mainstream operators are present within the town and as such residents have to travel to either Eastbourne or Brighton for this growth industry.
- 8.23 The Downs Leisure Centre and the Seaford Head Swimming Pool are both local authority facilities that provide important facilities for the town. The Downs Leisure Centre provides all weather outdoor pitches, a gym, a four court sports hall, a sunbed suite and a café, whilst the Seaford swimming pool provides lane swimming, water aerobics and swimming lessons. Both facilities provide well used community facilities.
- 8.24 Of the 1000 residents surveyed, 251 use health and fitness facilities. Again Brighton is the dominant centre with a cumulative market share of 19.9%, whilst Eastbourne attracts 6% of the market. However, Lewes compares favourably, with a market share of 13%. Equally the centres of Newhaven, Peacehaven and Seaford all have a healthy share of the market. The performance of each of the centres within the district is primarily a result of the appeal of the local authority run facilities.



A: Brighton Town Centre
B: Brighton Marina
C: Eastbourne Town Centre
D: Lewes Town Centre

E: Newhaven Town Centre
F: Peacehaven Town Centre
G: Seaford Town Centre

- 8.25 The trade draw of health and fitness establishments is often closely associated with travel to work patterns. This would seem case in this instance, as Brighton and Eastbourne attract trade from throughout a number of the study area zones, most probably those that regularly commute to both centres from throughout the District. Most of those using the health and fitness establishments in Lewes come primarily from the north and the town itself. To the south of the District, facilities in Seaford, Peacehaven and Newhaven each have a distinct, highly localised catchment.

- 8.26 Beyond the local authority facilities, there is little mainstream provision of health and fitness clubs within the District. Table 8.2 sets out our estimates of total memberships of the principal health and fitness clubs.

Table 8.2: Memberships of Principal Health and Fitness Clubs

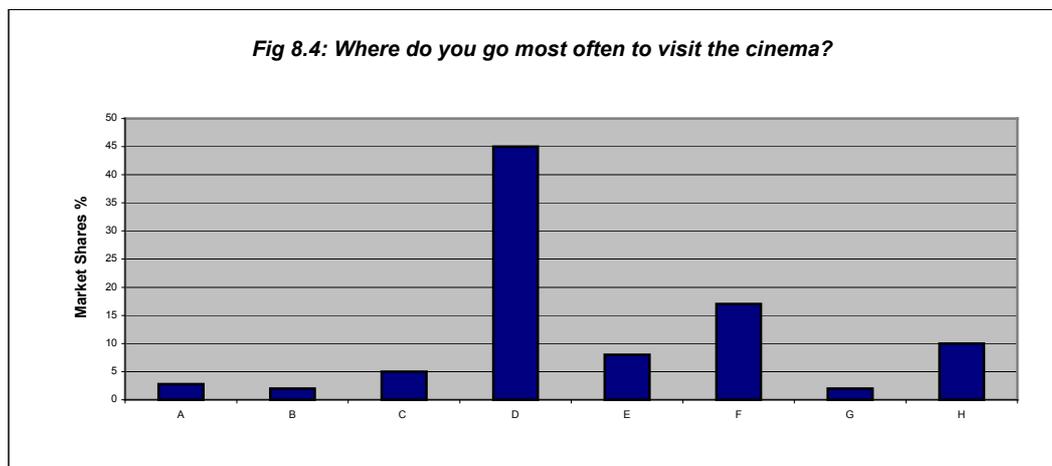
Centre	Membership
Lewes Leisure Centre;	501
Bodyworkshop, Lewes;	300*
Harts Leisure Club, Lewes:	500
Cloud Nine Fitness Centre, Plumpton	200
Seahaven Leisure Centre, Newhaven	348
Meridian Leisure Centre, Peacehaven	367
Downs Leisure Centre, Seaford	508
Sculptures Gym, Seaford	50
TOTAL	2,574

Source: GVA Grimley Survey, February 2005. *GVA estimates.

- 8.27 According to Mintel, 9% of the UK population is currently a member of a health and fitness club or gym, equating to 16,546 people within the study area for this assessment. This is significantly higher than the current membership levels within the district's facilities. While facilities outside the district are likely to account for some of this implied capacity, our analysis suggests there will still be scope for further mainstream health and fitness provision within the District.

Cinemas

- 8.28 There are no cinemas in the District, although up to date film showings are provided at the All Saints Centre in Lewes, the Meridian Centre in Peacehaven and the Downs Leisure Centre in Seaford. 633 respondents to the household survey confirmed that they visit cinemas in their leisure time. None of the respondents indicated that they use the roving facilities throughout the District. In practice, the majority of cinema goers use Brighton and Eastbourne; the UCG cinemas in Brighton and Eastbourne are the two most popular venues, but 8% also use the Orion in Burgess Hill, while 10% use the Picture House in Uckfield.



A: Duke of York, Brighton
 B: Gardner Arts Centre, Brighton
 C: Odeon, Brighton
 D: UGC, Marina Village, Brighton

E: Orion, Burgess Hill
 F: UCG, The Crumbles, Eastbourne
 G: The Pavilion, Hailsham
 H: Picture House, Uckfield

8.29 As we would expect, detailed analysis of the results suggests that, in general, residents to the west of the District favour facilities within Brighton whilst those to the east favour those in Eastbourne. However, many of those living to the north of Lewes also utilise the smaller facilities available at Burgess Hill and Uckfield.

8.30 This analysis suggests that a cinema would be a significant attraction within the District and as the principal centre Lewes would be the preferable location for any such facility, subject to operator demand.

Bingo

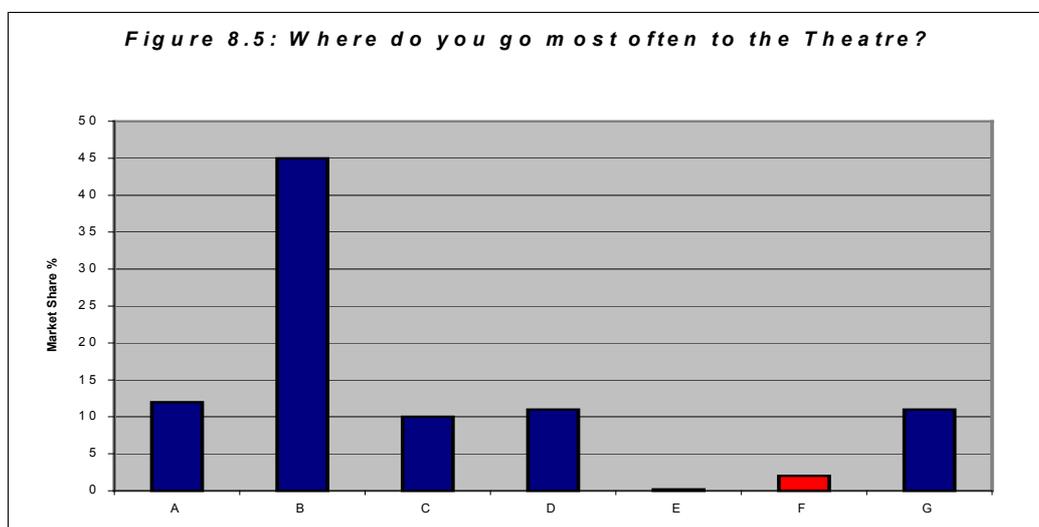
8.31 There are no Bingo Halls within the District of Lewes and thus all the trade to these facilities is lost to venues elsewhere. Only 5.4% of the survey area population use Bingo facilities and with three prominent facilities, Brighton accounts for 89% of the market. This suggests limited demand for additional facilities in the District.

Theatre

8.32 In all there are four theatres in the District, all of which are in Lewes and Seaford. The most well know of these is the Glyndebourne Opera House, which is located four miles north east of Lewes Town Centre. Set within the Countryside the opera house is renowned for hosting a variety of high quality operas. As such it is a valuable leisure facility within the District that helps attract visitors from

an extended catchment. The centre already benefits from visitors to the theatre but anything that can be done to strengthen links further should be encouraged by the Council.

- 8.33 Also within Lewes, The Lewes Little Theatre, located off Lancaster Street approximately 1km from the centre, provides a 158 seat auditorium. The Theatre is home to Lewis Theatre Club, a non profit making amateur organisation who put on regular productions. Whilst it provides an alternative leisure venue to the centres main leisure provision of food and drinking establishment, it is relatively small scale and is set some distance from the centre.
- 8.34 Seaford also has two theatres, Seaford Little Theatre and the Barn Theatre. Seaford Little Theatre, off Steyne Road to the south of the town centre provides a 103 seat auditorium and is run by a local organisations who put on four plays a year. The Barn Theatre, on Saxon Lane to the south of the man thoroughfare along Broad Street, provides an intimate auditorium that puts on a variety of small scale music and comedy events. Whilst only small scale, close to the town centre both facilities serve the local population, making an important contribution to the leisure provision within the town.
- 8.35 60.3% of respondents go to the theatre which suggest this is a popular leisure pastime within the district. The most popular venue is the Theatre Royal in Brighton with a market share of 45%, this is most likely due to the range of productions held here which are likely to appeal to a wide range of residents from within the district.



A: Brighton Dome, Brighton

B: Theatre Royal, Brighton

C: Devonshire Park Theatre, Eastbourne

D: Winter Gardens, Eastbourne

E: Glynderbourne Opera House

F: Lewes Theatre Club

G: London

- 8.36 The Dome Theatre, also in Brighton, shares a similar market share of around 10% with both the Devonshire Park Theatre and the Winter Garden Theatre, both of which are in Eastbourne. As a destination London attracts a significant proportion of theatre related activity from the district, with a market share of 11%.

SUMMARY

- 8.37 The leisure provision within the four centres is predominately focused around bars, pubs and restaurants, much of which, outside Lewes, is focused on the lower end of the market. It is evident from the survey that the majority of residents are dependent on Brighton and Eastbourne for trips to the cinema and the theatre, and to a lesser extent bars and nightclubs.
- 8.38 Relative to their function, we consider that each centre has a relatively healthy representation of restaurants, especially Lewes and Seaford. Notwithstanding this, a need exists for improvement in the facilities available in each centre. New eating and drinking facilities, especially high order facilities or those orientated towards visitors, should be encouraged in each centre in order to help attract additional people into these centres and to stimulate the evening economy.
- 8.39 We consider that capacity exists within the study area for further health and fitness facilities. Population growth is likely to compound the need and whilst this should improve usage in the Council run leisure centres, the development of a private, mainstream, health and fitness facilities within District would enhance further its appeal.
- 8.40 The cinema market is dominated by Brighton and Eastbourne, although there would be merit in exploring further the scope for a small scale art house cinema in Lewes in order to compliment the centres existing provision and to diversify further the centre's appeal.
- 8.41 It is evident that a high proportion of those living in the District visit the theatre. Most use the facilities in Brighton, Eastbourne and the West End. However, the presence of Glyndbourne, and more modest local facilities in Lewes and Seaford are important cultural attractions which reinforce the role of these centres.

9. POLICY RECOMMENDATIONS

- 9.1 This section draws on our recommendations for the developing town centre policies in the forthcoming local Development Framework.
- 9.2 The main focus of the LDF should be to promote and enhance the existing offer of each centre by supporting redevelopment, and continued investment to enhance the convenience, accessibility and attraction of each centre, and to provide criteria based policies against which planning applications can be evaluated.
- 9.3 Within this context we consider that the policy recommendations made below should be included within either the Core Strategy, as Development Control Policies or as Site Specific Policies within the forthcoming Local Development Framework.

LEWES

i) Core Strategy

- 9.4 Lewes should be promoted as the main focus for retail and leisure activity within the District. We do not anticipate any major expansion of its current role. However, in order to maintain its position in the hierarchy, and to continue to meet mainstream shopping needs, the centre needs an improved main food anchor, and to provide modern units to meet retailer requirements.
- 9.5 In addition to meeting the needs for improved retail provision within the centre, the core strategy should seek to direct new investment into the town centre in order to maintain and enhance the centre's role as the District's principle leisure, cultural and visitor destination. In particular the strategy should seek to improve the convenience retail offer within the centre.
- 9.6 Whilst new development should aim to reinforce the centre's distinctive character and enhance the eclectic mix of specialist/niche retailer and service operators, it needs to provide the 'critical mass' required to reinforce the centres principle role within the District. We would expect any development to be anchored by an improved convenience retail offer and to be supported by a range of modern comparison retail units, complimentary leisure uses and potentially visitor attractions/facilities. It is essential that any proposal is well integrated into the town centre to ensure that it does not function as a separate destination.

ii) Development Control Issues

- 9.7 The town centre boundary as defined within the local plan covers an extensive area, stretching from the Tesco Supermarket beyond the Phoenix Causeway and the end of Cliffe High Street in the east, to the western end of the High Street, beyond the castle ruins. A number of sites within the defined

main shopping area do not function as part of the town centre for the purposes of PPS6. Accordingly the town centre boundary should be refined to reflect, more appropriately, the area of town centre activity, as identified in Appendix 2.

- 9.8 Should a development opportunity come forward on the fringes of the centre then there may be scope for extending the town centre within the LDF. It is essential that such a development is well integrated with the town centre and focuses activity towards the existing primary frontages.
- 9.9 We do not consider that the Tesco store forms part of the town centre and regard the unit as an edge-of-centre location in terms of PPS6. The car park charging regime recently introduced by Tesco's has divorced further the Tesco shoppers from the town centre. Given the pressures within the store we anticipate that Tesco will, at some point in the future, seek to enhance/enlarge the unit. Before permitting enhancements to this store the Council should ensure that the potential to provide an improved foodstore in the town centre has been fully explored.
- 9.10 Whilst any proposal will have to be considered on its respective merits, the Council should encourage improvements to leisure provision within the town centre. The Council should ensure that any initiatives aimed at introducing mainstream health and fitness facilities or a cinema into Lewes are well integrated with the town centre and help reinforce the primary thoroughfare.
- 9.11 Policy E3 promotes a generic approach for considering a wide range of retail, leisure and commercial proposals, which suggests such uses are all acceptable within the town centre boundary. Policies within the LDF should make clear that the "centre" for retail development constitutes the primary shopping area whilst for all other main town centre uses the "centre" should be regarded as the area embraced by the town centre boundary.
- 9.12 The LDF should seek to differentiate between the primary and secondary frontages in order to ensure the core frontages remain the focus for retail activity. Currently the Local Plan identifies several "Primary Shopping Areas" along the main thoroughfare within Lewes Town Centre, none of which are promoted as the centres prime retail focus. This does little to reinforce the continuity of active frontages needed to maintain footfall through the centre and increases the likelihood of commercial activity becoming further dispersed.
- 9.13 As the centres prime focus, The Precinct should be acknowledged as the Primary Retail Frontage along with the complimentary frontages along Cliffe High Street, to the east. The High Street provides a more diverse range of uses and as such the frontages stretching up School Hill to the castle should be acknowledged as secondary. Policy for secondary frontages should not undermine the prime areas of retail activity located along the High Street, as currently identified, but should allow for a more diverse range of uses ensuring a flexible approach that will help keep these units occupied and promote vitality within the peripheral areas.

- 9.14 Any proposals for development on sites outside the town centre, should be subject to a criteria based policy which requires the applicant to demonstrate a need for the proposal; that there are no sequentially preferable sites within town centres or district centres, that there would be no impact on the vitality or viability of the centres; and that the proposal is accessible by a choice of means of travel.

iii) Site Specific Policy

- 9.15 We have identified the Eastgate Centre as offering the potential to accommodate retail and leisure development.
- 9.16 Development of this site offers the opportunity to improve the existing foodstore, enhance the frontages onto The Friars and to better utilise the Eastgate Car Park. Accordingly, we recommend that the Eastgate Centre should be identified as an opportunity site within the LDF, and should be the subject of a Supplementary Planning Document to ensure that any development proposals maximise the sites potential.

iv) Additional Initiatives

- 9.17 It is evident that the centre struggles from limited parking provision and this issue is compounded further by visitors to the centre. Despite the improved co-ordination of on-street and off-street parking, spaces remain limited. Given the importance of visitors to the town's economy, parking provision will be central to any future strategy to enhance the attraction of Lewes Town Centre. Accordingly the Council needs to keep under regular review the management, operation and pricing of existing parking, including the potential to limit facilities nearer the centre to short stay to ensure the optimum use of existing spaces. As part of this strategy the Council must also explore the opportunities for providing additional parking facilities in new developments.
- 9.18 In addition to the spatial strategy to be provided through the planning framework the Council should seek to actively promote the strengths of Lewes in order to enhance it's appeal as a visitor destination. A key element of this should be a co-ordinated branding strategy for the town centre in order to develop and market Lewes' local identity. Such a strategy should focus on the town's strong historic associations, architectural richness and distinctive character.
- 9.19 Should any large scale development proposals come forward within Lewes, the Council should explore the potential for new visitor attractions to be provided. Building on the work undertaken by the Council's Cultural Services Team, such facilities could be used to reinforce Lewes function as an arts retail destination.

- 9.20 In order to implement and monitor such a strategy the Council should consider the potential for a town centre manager. In addition to co-ordinating a strategy for promoting and differentiating the provision within Lewes Town Centre, the responsibilities of this role could be extended to include the management of the other key centres within the District.

NEWHAVEN

i) Core Strategy

- 9.21 Newhaven primarily serves a local convenience shopping and service function. It struggles to capture expenditure from outside the town, and in retail terms we do not consider that Newhaven will establish itself as a prominent destination within the District.
- 9.22 On this basis, we consider that the centre should be reclassified within the retail hierarchy as a District Centre. Newhaven has an important role to play in meeting the needs of the local community. There is limited scope for any significant additional retail floorspace in the centre, but the core strategy should aim to enhance the existing main food anchor, and to enhance the centres wider appeal as a visitor centre.

ii) Development Control Issues

- 9.23 In developing its policy position, the Council should seek to resist any out-of-centre development in a bid to reinforce the primary frontages within the centre. In this context a criteria based policy requiring developments outside the town centre to address the key tests as prescribed in PPS6 should be adopted within the LDF.
- 9.24 Beyond this the Council need to enhance Newhaven's appeal as a District Centre. The LDF should continue to promote the co-ordinated enhancement of the centre along with Denton Island, the marina and the Fort and in so doing policy must ensure that development in these locations is well linked to the centre.
- 9.25 Retail activity within Newhaven Town Centre is primarily focused on Newhaven Square and the High Street. The primary shopping area as identified within the Local Plan, should be upheld within the LDF as the primary retail frontage. This will encourage retailers moving to the town to locate in this area, which will help underpin retailer provision generally within the centre.
- 9.26 Beyond this there are a range of town centre uses located to the west of the High Street, along Bridge Street and off Chapel Street. As such, we concur that the South Way/Lewes Road ring road represents the town centre boundary and policy should allow for a diverse range of uses in this area to help maintain vitality and viability throughout the centre.

- 9.27 Railway Quay is out-of-centre and accordingly any scheme proposing commercial uses in this location should be assessed against the requirements of PPS6. Notwithstanding this, should it become available, the site represents an important opportunity to attract further activity into Newhaven and to ensure a vibrant waterfront. The Council should ensure that any development compliments the town centre and strengthens linkages with the development proposals to the west. It is important that any development does not function as a destination in itself. Proposals should be residential lead and any commercial uses should be ancillary. Given the fragile nature of the centre general retailing is not suitable in this location.

iii) Site Specific Policy

- 9.28 We have highlighted three development opportunities that require specific reference within the LDF, as detailed below:

Somerfield / Newhaven Square

- 9.29 Currently the Somerfield unit in Newhaven Square is trading very strongly and as such is successfully anchoring the centre. The owners of the precinct have previously proposed to re-configure the existing Somerfield Store, reduce the number of car park spaces in the adjacent multi-storey car park and provide two new 5,000 sq. ft. retail units.
- 9.30 The enhancement of this site would significantly improve the town centre environment, potentially opening the centre up to the surrounding area, providing improved access and egress and a more complementary landmark. Importantly improved foodstore provision would help strengthen the centres convenience function and potentially provide accommodation for some of the other prominent national retailers currently with requirements to locate in the centre.
- 9.31 We consider the site should be identified as an opportunity site within the LDF and recommend that the Council consider preparation of a Supplementary Planning Document for the site to ensure any redevelopment meets wider objectives for the centre.

Post (sorting) Office, 54 High Street

- 9.32 Following the relocation of the post office counter services to 46 the High Street this unit is now partly vacant. In the short term the site is only likely to provided limited development opportunity whilst it remains associated to the sorting operations to the rear.
- 9.33 In the medium to long term, if the Royal Mail are able to relocate their sorting operations, this site might provide significant opportunities for mixed use development. The Council should monitor the availability of this site and as such should enter into discussions with Royal Mail. Should the site

become available during the lifetime of the LDF, the Council should consider the need to provide guidelines for any future development proposal through a Supplementary Planning Document.

Bridge Street

- 9.34 In October 2002 an outline application to develop an 18 storey residential, office and leisure scheme at 1-13 Bridge Street was refused by the Council, primarily on the grounds of scale and design. It is anticipated that a revised scheme is likely to be forthcoming shortly proposing a reduced scale scheme with similar uses to before, namely office, residential and A1/A3 uses.
- 9.35 In principle, the development of A1/A3 uses in this location is acceptable, whilst the associated uses would help generate further demand for the existing uses within the centre. The Council should monitor progress on this site and subject to design requirements, encourage commercial development in this location

iv) Additional Initiatives

- 9.36 As the West Quay development has demonstrated, residential accommodation has the potential to reinforce the vitality and viability of the centre. Within the LDF the Council should explore the potential for encouraging residential development throughout the town centre.
- 9.37 To compliment the spatial framework to be provided through the LDF, a tourist/visitor strategy should be developed that promotes the key attributes of the town, namely the marina, the fort and the beach. The promotion of these facilities and the development of a distinct identify for Newhaven will provide benefits for the centre if current links through the town can be enhanced.

PEACEHAVEN

i) Core Strategy

- 9.38 The two centres within Peacehaven both serve different roles and draw trade from different catchments. There are no physical links between the two areas and consequently few visitors link trips between the two. As such it is appropriate that within the LDF both "The Meridian Centre" and "The South Coast Road" should continue to be defined as separate centres.
- 9.39 Neither of the two centres within Peacehaven functions as a town centre in terms of PPS6. The Meridian Centre has the characteristics of a district centre, as defined within PPS6, and should be reclassified within the local retail hierarchy in recognition of this. However, the centre provides an important function as the hub of the local community and as such it is considered that this should be the main focus of new retail/leisure and other town centre uses.

9.40 The South Coast Road, is made up of a range of retail and service uses, it is not anchored by any one unit, nor does it provide a significant function for local residents. It still serves an important function and successfully manages to retain passing trade within the centre. However, we consider it may be more appropriately defined within the LDF as a local centre. This will continue to allow commercial uses to locate in this area whilst affording the Council the flexibility required to consider the range of uses promoted within the centre.

ii) Development Control Issues

9.41 Within the Meridian Centre retail activity is already consolidated within the physical limitations of the building. As such the LDF should identify the centre as primary shopping areas. The Centre boundary should be draw so as to include the adjacent community uses including the Doctor's Surgery of Meridian Way, the library, the Council Offices and the Meridian Leisure Centre, as identified in Appendix 2.

9.42 Given the dispersed nature of commercial activity within The South Coast Road, the definition of the key retailing frontages serves little function. Instead policy within the LDF should make clear that within the boundaries of the centre commercial uses, comprising A1,A2,A3,A4,A5,D1 and D2 will be appropriate provided they are of an appropriate scale to the function of the local centre, and would complement and enhance the Meridian Centre as the main district centre of Peacehaven.

9.43 Development outside either of these centres should be subject to a criteria based policy requiring the key tests of PPS6 to be addressed, as recommended above in relation to Lewes and Newhaven.

iii) Site Specific Policy

9.44 Within Peacehaven there are only two identifiable development opportunities, both adjacent to the Meridian Centre; the associated car parking that surrounds the centre and the industrial units to the east. Accordingly the Council should identify the Meridian Centre as a development opportunity, allowing for either the enhancement or the wider redevelopment of the centre.

9.45 A clear need exists to improve the foodstore provision within the Meridian Centre to ensure it is better able to meet the everyday needs of the local community. As such the LDF should support enhancements to the existing Co-op store.

9.46 The Local Plan identifies the industrial units to the east of the Meridian Centre as offering potential to accommodate new leisure uses. Given the centres local function and the proximity of extensive leisure provision within Brighton and Eastbourne, we do not consider that it is appropriate to plan for large-scale leisure provision within Peacehaven. Criteria based polices relating to town centre uses, as discussed above, will afford the Council the flexibility to assess any such proposal that might come forward on their own merits.

SEAFORD

i) Core Strategy

9.47 Seaford Town Centre successfully serves its local catchment in the face of growing competition from Eastbourne. It is evident from the wide range of goods and services provided that the town as a whole is relatively self-sufficient.

9.48 Whilst it only serves a local catchment, Seaford is a viable and vibrant centre that serves all the functions of a town centre as defined in PPS6. The study has confirmed that Seaford is a stable centre. In order to reinforce the vitality and viability of the centre the LDF should aim to consolidate existing provision, whilst building on the centres existing strengths to help increase market share.

ii) Development Control Issues

9.49 Seaford is a stable centre and the study has confirmed that generally there is little capacity for any new retail or leisure floorspace within the centre. To ensure that it continues to successfully serve local needs, the strategy for the town needs to reinforce the existing provision. Retail uses should be encouraged towards the primary shopping area, whilst policy should allow for a more diverse range of uses beyond this to help generate vitality towards the peripheral areas.

9.50 Policy within the LDF should maintain the primary retail frontages as currently defined within the Local Plan as this appropriately reflects the primary frontages and recognises Safeway's role as a key anchor store. On the peripheries of the primary retail frontages policy should allow for a more diverse range of uses

9.51 Beyond these frontages, commercial activity within the centre is limited and accordingly the town centre boundary as currently defined should represent this. As currently defined the town centre boundary incorporates a number of areas that do not function as part of the town centre in terms of PPS6. Development outside of the town centre boundary should be subject to a criteria based policy that reinforces the requirements of PPS6.

iii) Site Specific Policies

9.52 As acknowledged by the Council, development opportunities within Seaford are extremely limited. As such no sites have been identified within this study. Given the limited capacity within the centre, it is not anticipated that large scale development sites will be required in the life time of the LDF. Accordingly policy should continue to place emphasis on filling vacancies and extended existing shop units within the centre

- 9.53 Safeway is trading extremely well and anchors the centre's convenience function. Whilst the study concluded that quantitative capacity is currently limited a qualitative need exists for enhancements to the store to ensure that it continues to meet local needs. Policy within the LDF should encourage enhancements to the store and should any proposals to extend the store come forward, the Council should have regard to the wider benefits this may provide for the centre.

iv) Additional Initiatives

- 9.54 Seaford does not fully exploit its potential as a visitor attraction. The spatial framework provided through the LDF needs to be complemented by wider Council initiatives aim at successfully branding the centre and attracting more visitors. Whilst Seaford lacks the specialist provision of Lewes, it has a vibrant local community and as such the local identity of the town should be actively promoted, potentially through a series of themed events.

LOCAL SHOPS

- 9.55 The demand for local shops is anticipated to decline. Policy should seek to retain important local shops where possible. However, this may prove difficult, as many operations become unviable. The key aim for local parades should be to ensure they remain a vibrant focus for the local community. Where it is not possible to retain local shops, policy should retain sufficient flexibility to allow each proposal to be considered on its merits.

MONITORING

- 9.56 PPS1, PPS6 and PPS12 require Local Planning Authorities to undertake continuous monitoring of their plans and policies, assessing whether the policies in local development schemes are being achieved. Local Planning Authorities are required to produce annual monitoring reports, assessing whether policies are meeting targets, the impact of policies and the need to change policies to reflect changes in regional or national planning policy.
- 9.57 Should development proposals come forward within the District then these will need to be reviewed against the findings of this assessment. Our assessment is based on current trends, competing centres, planning policy, health of town centres, and quantitative and qualitative issues, all factors that will change over time. Consequently in reviewing the respective merits of any future proposal, regard should also be had to the circumstances at the time. Such considerations will include:
- Retail and leisure commitments and proposals in the competing centres;
 - Proposals in the District's centres;
 - Major changes in retail occupiers;

- Vitality and viability indicators within the centre
- Development opportunity sites;

9.58 In reviewing these details the District Council will need to consider the extent to which any changes within the District will impact on the retail and leisure strategy adopted within the LDF.