

Eastbourne Borough: Retail & Leisure Study

Prepared for: Eastbourne Borough Council

December 2022

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1. INTRODUCTION

Purpose of the Study

Cushman & Wakefield, alongside CPW Planning, has been instructed by Eastbourne Borough Council (EBC) to prepare a new Retail and Leisure Study for the Borough. It supersedes the Eastbourne Borough Shopping Assessment 2010.

The Study has been prepared in parallel with the [Lewes District Retail and Leisure Study 2022] as part of a joint commission from Lewes and Eastbourne Councils.

It has been prepared in the context of the recovery from the Covid-19 pandemic and utilises the latest available information, including a new household telephone survey of shopping patterns.

The main objectives of the Study can be summarised as follows:

- i. Review the national and local planning policy context relevant to the Study;
- ii. Review the retail, leisure and office markets and the trends influencing change and town centre investment;
- iii. Undertake town centre healthcheck assessments;
- iv. Forecast the expenditure-based capacity for new retail floorspace in the Borough;
- v. Prepare a commercial leisure 'needs' assessment;
- vi. Review town centre boundaries and primary shopping areas; and
- vii. Provide planning policy advice relating to town centre matters.

This Study therefore provides the evidence base to assist EBC with its work on the emerging Local Plan, and to support the development management function of the local planning authority. It has been prepared in accordance with the National Planning Policy Framework (NPPF) (July 2021) and the *Town centres and retail* section of the Planning Practice Guidance (PPG) (as updated on 18 September 2020).

Structure of the Study

This Study is structured as follows:

- Section 2 – Planning Policy Context
- Section 3 – Market Context & Trends
- Section 4 – Town Centre Health Checks
- Section 5 – Retail Needs: Approach & Baseline Evidence
- Section 6 – Retail Needs: Forecasts
- Section 7 – Commercial Leisure Needs Assessment
- Section 8 – Town Centre Boundaries & Primary Shopping Areas
- Section 9 – Summary & Policy Recommendations
- Section 10 – Scenario Assessments
- Appendix i – Catchment Area Plan
- Appendix ii – Retail Capacity Tables
- Appendix iii – Household Survey Results
- Appendix iv – Town Centre Boundaries & Primary Shopping Areas

2. PLANNING POLICY CONTEXT

This section provides an overview of the relevant national and local planning policy context pertaining to retail and other main town centre uses.

National Planning Policy Framework (NPPF)

Local Planning Authorities (LPAs) should take the NPPF into account in the preparation of Local Plans. The presumption in favour of sustainable development is a key objective for both plan-making and decision-taking, and the NPPF (paragraph 11) sets out the Government's view of what constitutes sustainable development.

For plan-making the NPPF states that plans should promote a sustainable pattern of development by seeking to meet the development needs of their area, align growth and infrastructure, and improve the environment. For decision-taking the onus is on LPAs to approve development proposals that accord with an up-to-date development plan without delay. Where the development plan is silent, or policies are out-of-date, permission should be granted unless there is a clear reason for refusal.

Chapter 3 ***Plan-making*** provides guidance to LPAs on preparing their development plans. Paragraph 20 requires plans to include strategic policies that make sufficient provision for (inter alia) housing, employment, retail, leisure and other commercial development, alongside infrastructure and community facilities.

Paragraph 31 states that planning policies should be underpinned by relevant and up-to-date evidence. To ensure plans and spatial development strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 33).

Chapter 6 ***Building a strong, competitive economy*** requires planning policies to create the conditions in which businesses can invest, expand and adapt. It states that planning policies should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future, including by setting out a clear economic strategy and being flexible enough to accommodate needs not anticipated in the development plan.

Chapter 7 ***Ensuring the vitality of town centres*** provides guidance on plan-making and decision-taking for retail and other main town centre uses. Paragraph 86 sets out criteria that LPAs should consider when preparing planning policies. These include:

- Defining a network and hierarchy of town centres;
- Defining town centre boundaries and Primary Shopping Areas;
- Retaining and enhancing existing markets and the potential to create new markets;
- Meeting anticipated needs for main town centre uses over (at least) a 10-year period by way of identifying suitable town centre sites;
- Where suitable town centre sites are not available, identifying suitable edge-of-centre or other locations subject to their connectivity and accessibility to the town centre;
- Promoting residential development in town centres.

Paragraphs 87-91 specifically set out the sequential and impact tests relevant to determining applications for new retail and other main town centres uses that are neither in an existing centre, nor in accordance with an up-to-date development plan.

Paragraph 87 states that, *Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.*

Paragraph 88 adds, *When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored.*

Paragraph 90 refers to the impact test. It applies to all applications for retail and leisure development (only) over a proportionate, locally set floorspace threshold (the default threshold is 2,500 sqm gross if there is no locally set threshold). This should include assessment of the impact on:

- a) *existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
- b) *town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).*

The NPPF (paragraph 91) states that, *Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 90, it should be refused.*

Planning Practice Guidance (PPG)

This Study also draws on advice set out in the ***Town centres and retail*** section of the PPG, which was updated in September 2020.

Of relevance is paragraph 004, which states that town centre strategies and the assessment of the potential for centres to accommodate a suitable range of development should focus on a limited period (such as the next five years) given the uncertainties around forecasting long-term retail trends and consumer behaviour.

The PPG provides advice to LPAs on the preparation of development plans and town centre strategies. In terms of what a town centre strategy should contain, paragraph 004 refers to:

- the realistic role, function and hierarchy of town centres over the plan period;
- the vision for the future of each town centre, including the most appropriate mix of uses;
- the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space;
- how existing land can be used more effectively;
- opportunities for improvements to the accessibility and wider quality of town centre locations;
- what complementary strategies are necessary or appropriate to enhance the town centre;
- the role that different stakeholders can play in delivering the vision;
- appropriate policies to address environmental issues facing town centres.

In circumstances where future development needs cannot be accommodated in town centre locations, the PPG (paragraph 005) states that *planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the identified need for these main town centre uses, having regard to the sequential and impact tests.*

In applying the sequential test for plan-making purposes, LPAs are expected to consider the following checklist (paragraph 010):

- Has the need for main town centre uses been assessed?
- Can the identified need for main town centre uses be accommodated on town centre sites?
- If the additional main town centre uses required cannot be accommodated on town centre sites, what are the next sequentially preferable sites that they can be accommodated on?

Paragraph 006 of the PPG identifies a series of indicators that may be relevant in assessing the health of town centres, including but not limited to the diversity of uses, vacancy rates, retailer representation, pedestrian flows, and evidence of barriers to business investment. These indicators underpin our town centre healthcheck assessments.

Guidance is also provided on permitted development and change of use in town centres (paragraphs 007-008), including where it may be appropriate to use permitted development rights to support flexibility in town centres.

Development Plan

The development plan for Eastbourne Borough comprises the following:

- Eastbourne Borough Plan (2003)
- Eastbourne Core Strategy (2013)
- Eastbourne Town Centre Local Plan (2013)
- Eastbourne Employment Land Local Plan (2016)

We identify the policies of relevance to this Study below.

Eastbourne Borough Plan (2003) 'Saved' Policies

The Eastbourne Borough Plan was adopted in 2003 and contains a number of saved policies, which are used to determine planning applications, until replaced by the emerging Local Plan.

Policy SH2 (Business Uses Outside the Retail Hierarchy) states that, outside of the Town Centre and the identified district, local and neighbourhood shopping centres, planning permission will be granted for the change of use of premises in class A1, A2 or A3 use to class B1 or D1 uses. It further allows for conversion or redevelopment to residential use where it can be demonstrated that premises have been marketed for both retail or business use without interest, at a price that reflects local market prices.

Policy SH6 (New Local Convenience Stores) states that planning permission will be granted for local convenience stores of no greater than 500 square metres gross outside of the centres identified in the retail hierarchy, where it can be satisfactorily demonstrated that there is a need for such a facility, subject also to a series of other criteria.

Policy SH7 (District, Local and Neighbourhood Centres) concerns change of use proposals within the district, local and neighbourhood shopping centres. It states that proposals for the change of use of existing ground floor shopping units from class A1 uses to uses in class A2 and A3 will be considered having regard to the following criteria:

- a) the location and prominence of the premises within the shopping frontage;
- b) the floorspace and frontage of the premises;
- c) the number, distribution and proximity of other ground floor premises in use as, or with planning permission for, A2 and A3 uses (within any centre A1 uses should predominate);
- d) the particular nature and character of the use proposed, including the level of activity associated with it;
- e) whether the use would harm residential amenity;
- f) whether adequate short term parking facilities are available.

Eastbourne Core Strategy (2013) Policies

The Eastbourne Core Strategy was adopted in February 2013 and provides the planning framework, including strategic policies, for Eastbourne.

Policy D4 (Shopping) sets out the Council's approach to retail development. It promotes the Town Centre's role as the primary comparison shopping destination in the Borough by:

- Protecting larger units – particularly in the primary shopping frontages – from subdivision or change of use
- Ensuring that new retail development:
 - o makes a positive contribution to improving the Town Centre's viability and vitality;
 - o supports the creation of a comfortable, safe, attractive and accessible shopping environment;
 - o improves the overall mix of land uses in the Town Centre; and
 - o strengthens the town's independent retail offer, and improves the integration between the primary shopping area and the seafront.

The policy defines the Borough's retail hierarchy as follows:

- A. Eastbourne Town Centre Primary and Secondary Shopping Areas

- B. District Shopping Centres (DSC)
 - Green Street (Albert Parade)
 - Hampden Park (Brassey Avenue)
 - Langney Shopping Centre
 - Meads Street
 - Old Town (Crown Street)
 - Seaside (Langney Road to Springfield Road and adjacent to St James' Road)
 - Sovereign Harbour
- C. Local Shopping Centres (LSC)
 - Rodmill
 - St Anthony's (Beatty Road)
 - Seaside (Seaford Road to Channel View Road)
- D. Neighbourhood Shopping Centres (NSC)
 - The Broadway (Hampden Park)
 - Queens Parade (Hampden Park)
 - Old Town (Victoria Drive)
 - Grand Hotel Buildings (Meads)
 - Carlisle Road (Meads)
 - St Anthony's (Winston Crescent including local supermarket)
 - Town Centre (Cavendish Place)

The policy further outlines the sequential and impact tests set out in the NPPF. It seeks to strengthen consumer choice and the vitality and viability of the Borough's centres by supporting new retail development which:

- complies with the sequential approach to site selection, which prioritises development in the following order:
 - o Eastbourne Town Centre Primary and Secondary Shopping Areas
 - o District Shopping Centres
 - o Local Shopping Centres
 - o Neighbourhood Shopping Centres
 - o Edge-of-centres; and
 - o Out-of-centre sites, which are accessible by a choice of transport means.
- is appropriate in scale and function to its location;
- is fully integrated with the existing shopping area;
- will not have an unacceptable adverse impact, including; cumulative impact, on the vitality and viability of the Town Centre and surrounding district, local and neighbourhood centres;
- helps maintain and develop the range of shops to meet the needs of the local community within the centre.

Eastbourne Town Centre Local Plan (2013) Policies

The Eastbourne Town Centre Local Plan was adopted in November 2013. Its overall objective is to ensure that Eastbourne Town Centre remains a vibrant, attractive and welcoming place for the whole community.

Policy TS3 (Mixed Use Development) supports a mix of uses throughout the Town Centre with priority to retail uses, leisure and cultural uses, employment generating uses (particularly offices), residential, supporting community uses, and evening and night-time economy uses including cafes, restaurants and bars. It adds that mixed use developments and

mixed uses within individual buildings will be encouraged (for example ground floors accommodating a different use to upper floors) to support the vitality of the Town Centre and provide active frontages and surveillance at different times of the day and night.

Policy TS4 (Primary Retail Areas) aims to maintain and enhance the Town Centre's primary retail areas (defined as The Arndale Centre; 11-155 Terminus Road; 96-170 Terminus Road; 1-4 Langney Road; and 46-94 Terminus Road). Therein, Use Classes A2, A3 and A4 will only be permitted at ground floor level where:

- it would result in no more than 10% of the overall retail frontage in the Arndale Centre or 25% of the overall retail frontages in the remaining primary retail areas being in non-retail use;
- no more than three consecutive shop units are in non-retail use; and
- a ground floor shop front window is retained.

The policy does not permit other non-retail uses within the primary retail areas.

Policy TS5 (Secondary Retail Areas) states that, in order to maintain and enhance the Town Centre's secondary retail areas, the comprehensive redevelopment or amalgamation of individual shops within the secondary retail frontages will be resisted unless it can be demonstrated that this contributes to the overall vitality and viability of the Town Centre.

The policy only permits non-retail uses at ground floor level where:

- it would result in no more than 35% of the overall retail frontages in each Secondary Retail Area being in non-retail use;
- no more than three consecutive shop units are in non-retail use; and
- a ground floor shop front window is retained.

Policy TS7 (Supporting the Evening and Night-time Economy) promotes Eastbourne Town Centre as an inclusive evening and night-time economy destination, and seeks to ensure that such uses contribute to the vitality and viability of the Town Centre.

Eastbourne Employment Land Local Plan (2016) Policies

The Employment Land Local Plan (ELLP) was adopted in November 2016 and guides economic development up to 2027 as well as identifying an appropriate supply of future employment land in the Borough. It sets out that, traditionally, Eastbourne Town Centre has been the main focus for office floorspace provision; and that it remains an important location for such provision.

Policy EL3 (Town Centre) identifies Development Opportunity Site 2 – Land adjoining the Railway Station and the Enterprise Centre – for a total of 3,750 sqm (GEA) of office floorspace. It states that office development should be high quality class B1a/b floorspace that is flexible to meet multi-occupier needs. The policy adds that proposals for the refurbishment of existing office stock to meet modern occupier demands will be supported.

Policy EL4 (Sovereign Harbour) promotes a total of 23,125 sqm (GEA) of B1 office floorspace at Sovereign Harbour, predominantly on Site 6 and Site 7a, in a flexible format that will allow businesses to adapt. It states that Site 7a should also accommodate a community centre. The policy indicates that other employment-generating uses that are comparable with the residential area (with the exception of class A1, A3 and A5 uses) will be acceptable on any remaining land on Site 6 and Site 7a following the delivery of the 23,125 sqm (GEA) of B1 office floorspace.

3. MARKET CONTEXT & TRENDS

Introduction

This section of the report will seek to identify the current and future trends of the key commercial sectors (Retail, Leisure & Hospitality and Office) plus residential at both a national and local level. Market trends will influence the performance of town centres in the future, and so will need to be taken into account when developing planning policy.

Additionally, in order to understand the principal functions of the town, and therefore how these trends may fit into Eastbourne's market, the report will examine the current market performance of Eastbourne. To provide context, this market performance will also be examined in comparison with several similar local markets.

Retail Market

UK Market Context: Strategic Trends

The retail sector endured an especially difficult pandemic, with multiple lockdowns requiring businesses to close or reduce their operating capacity significantly. Online businesses were better placed to react to those lockdowns and the resultant wider change in customer behaviours, and these pressures resulted in the permanent closure of many shops and businesses. This large-scale disruption caused the number of lettings to drop significantly, and when coupled with business closures this resulted in an increase in retail vacancies, with shopping centres and less affluent towns being most severely impacted by these disturbances.

The highest number of net business closures were concentrated in city centres, smaller centres were more resilient. Shopping centres were hit disproportionately hard due to their higher proportion of tenants within fashion and leisure – two of the sectors that were most harmed by the pandemic. Retail parks generally prospered during the pandemic, and have remained the most resilient type of retail location since the relaxation of restrictions.

The lifting of restrictions saw footfall and sales growth, resulting in a commensurate growth in levels of leasing, and in the first six months of this year, store closures have slowed significantly – from 61 a day in H1 2020 to 34 per day in H1 2022 – the lowest level since 2017¹. Lettings UK-wide reached a four-year high in the final quarter of 2021, with a notable revival in leasing activity by fashion and food and beverage retailers spurring this.

The discount retail sector has seen recent expansion, mainly in out of town locations. A host of big deals by the likes of B&M, The Range and Poundstretcher have occurred in recent months. B&M has been especially active, taking c. 20,000 sq ft stores in Crewe, Leeds and South Shields. Alongside B&M, the likes of Lidl, Aldi and Decathlon have all been expanding into new sites in the last year.

However, these green shoots are now once again threatened by the Bank of England's predictions of an impending recession – issues such as rising inflation and a burgeoning cost of living crisis have dented consumer confidence and as a result, retail is once again facing difficult market conditions.

This market context has of course had property-side impacts. There is little retail space in the construction pipeline in response to the aforementioned high vacancies and struggling tenants, and in fact in many larger towns there has been a recent trend for removing retail space, for example by converting department stores into a variety of other uses, something exacerbated by changes to planning regulations.

Most recent and ongoing retail construction is in the form of town centre regeneration, with local authorities proactively working with retail landlords to revitalise high streets in places like Maidenhead, Slough, Stockport and Basildon. Local authorities have been buying shopping centres to proactively regenerate their town centres; however this trend has ebbed a little over the past year or so as other investors move into the space. A host of shopping centres have been acquired recently, which saw shopping centre investment rise in 2021.

As with lettings, investment in the sector – with the exception of supermarkets, which have generally remained strong – has dropped sharply, and prices paid have followed, although the aforementioned repositioning of shopping centres/department stores has led to some speculative investment in the sector with an eye to changing uses away from retail.

¹ PWC <https://www.pwc.co.uk/industries/retail-consumer/insights/store-openings-and-closures.html>

We have set out some trends in retail below:

The growth of online shopping

- The rapid growth in online shopping since the late 1990s has increased the market share of non-store retail sales with visible consequences for high streets and other shopping destinations. Yet the degree of impact is uncertain in the context of multi-channel retailing: stores are often a source of stock for online retail sales, while the internet can even direct customers to stores (e.g. use internet to research but make purchase in store).
- In 2019, before the Covid-19 outbreak, online shopping accounted for around 20% of total retail sales with significant variations by sector. Only around 5% of food sales were internet-based, whereas almost 20% of clothing and footwear sales (a key sector for many larger town centres) were attributable to online shopping. Some 60% of sales on DVDs, music and books were made online.
- The pandemic and the national lockdowns that followed, resulting in the temporary closure of many shops, accelerated the significant growth in online shopping. According to UK figures published by ONS, online retail sales as a proportion of total retail sales peaked at above 30% in January 2021, before falling in the following months as restrictions were gradually lifted over the spring and summer. Notwithstanding the drop in non-store shares during 2022, it is expected that these shares will remain higher than 2019 levels.

Improved digital capability

- Consumers are demanding, often unwilling to wait more than 2-3 days for deliveries, whilst being increasingly dependent on technology to fulfil one's shopping needs. The pandemic has changed or reinforced pre-lockdown behaviours, with more consumers willing to try – and switch to – digital forms of shopping.
- Modern retailers are therefore investing more and more in digital platforms. This is coinciding with the decisions of some retailers to close their bricks-and-mortar stores and transforming into online-only brands. Examples include Maplin, Cath Kidston, and TM Lewin; and the trend is not limited to retail, with Thomas Cook (travel agent) and others also relaunching as online-only businesses.
- While many larger retailers are investing in digital channels, this is not necessarily the case with smaller independents and high street businesses (although Covid-19 related impacts have forced some businesses to establish or develop online interest in order to generate sales). For most retailers, however, successfully combining physical and digital propositions will be necessary in the face of an increasingly competitive marketplace.

Right-sizing store portfolios

- Prior to Covid-19, the shift towards online shopping resulted in a period of significant change and quite considerable consolidation from long-standing UK retailers. Large retailers increasingly focused on a smaller number of prime locations for their store portfolios (often referred to as polarisation) where they can have flagship-type stores and serve wide catchments. Others relaunching as online-only retailers, as commented before.
- Much of this change can be attributed to a large number of loss-making stores, particularly in the context of reducing footfall and a highly competitive pricing environment. Company voluntary arrangements (CVAs) have been a preferred restructuring method for many retailers such as Debenhams (which closed in Eastbourne Town Centre in January 2020 following the sale of the department store brand to online retailer BooHoo), Monsoon, Mothercare, Homebase, New Look and Accessorize.
- Some retailers are continuing to 'right-size' or even abandon their store portfolios. Others however – notably the discounters such as Aldi, Lidl and B&M – continue to expand throughout the UK and mainly in out-of-centre locations.
- The pandemic has also had a major impact on the 'grab-and-go' food market, which relies heavily on office workers and commuters. The shift in work patterns and the reduction in footfall has made some outlets unviable, with Pret and Costa Coffee announcing widespread closures in the past 12-18 months.
- Service-based retail uses (i.e. financial services, travel agents) have seen a gradual contraction in store numbers in recent years, due to the continued growth of internet alternatives which provide convenient access to online banking and holiday price-comparison websites. This form of structural change has consequences for footfall and consumer spending, most notably in secondary town centres which are more dependent on such uses.

Changing store formats

- Today's consumer has high expectations for convenience, experience and personalisation; largely driven by smart phone technology (i.e. Apps) and social media (i.e. Facebook, Instagram, TikTok). Shopping is becoming more leisure focused and activity-based, which is reflected in new, often extensive store formats.
- The large Next / Next Home 'flagship' stores are a well-known example of a major retailer developing out-of-town showrooms to provide a substantially expanded range of comparison goods and lifestyle experiences.
- Some retailers, on the other hand, require (or are experimenting with) smaller and more efficient store formats. Homebase has launched a new split-level, small format showroom dedicated to kitchens (at ground floor level) and bathroom displays (first floor). Dunelm operates a similar town centre format. These concepts coincide with the shift towards home or 'hybrid' working and greater levels of spending on home improvements.
- The grocery sector has been reacting to changing shopping habits in recent years with implications for store formats. The underlying trend prior to Covid-19 was the decline of 'bulk' food shopping as consumers shopped around for best value and/or undertook more frequent top-up (or 'basket') food shopping trips. This trend coincided with Aldi and Lidl expanding their market share, driven by store expansion programmes, and it was confirmed in September 2022 that Aldi has overtaken Morrisons to become the UK's fourth-largest grocery retailer.
- Retailers are increasingly incorporating click-and-collect services into their stores or within adjacent customer car parks (for example Sainsbury's – and by virtue of their business connection Argos – from their store in the Beacon). As well as often accounting for a substantial proportion of retailers' online sales, click-and-collect reduces 'last mile delivery' costs and can create additional sales volumes.

Space sharing

- The adaptability of retail space is increasingly important in a fast-moving sector. There is greater collaboration between retailers in terms of sharing space; and between shopping centre landlords and their tenants in the provision of collection points and/or lockers.
- One of the most successful retailer tie-ups has been Sainsbury's and Argos, while Laura Ashley recently returned to the UK high street in a new partnership with Next. B&Q has concession stores in a small number of Asda superstores. There are a small number of examples of this taking place in Eastbourne, most notably the aforementioned collaboration between Sainsbury's and Argos through their store in the Beacon, but also within larger retail parks such as Asda Sovereign Harbour Retail Park, which within its footprint houses a Post Office, Timpson locksmith and a Max Spielmann.

The sharing of town centre space is not limited to the retail sector, however:

- Foundry in Eastbourne Town Centre (The Beacon) is a recent example of shared, repurposed shopping centre space. Spread over two floors, it offers a range of co-working and incubation spaces for rent as well as ground floor concession space for independent traders. However, this example is very new and so assessing its longer-term success and impact at this stage is difficult.
- A further example – west along of the South Coast – is Bournemouth's iconic former Debenhams building, which has been reinvented as a community, experience-led mixed use destination for local traders and entrepreneurs. Now known as Bobby's, it includes a market hall, a beauty hall, artist space and a gallery, a traditional ice cream and coffee parlour, and other food and beverage uses with outdoor seating.

Such concepts highlight the potential opportunities for the re-use of the former Debenhams department store in Eastbourne Town Centre (subject to viability and other factors).

- Innovative concepts of this nature are likely to become more common as large, redundant retail (and non-retail) spaces become more difficult to fill with single occupiers; and will help to offset rising occupancy/operational costs. The changes to the Use Classes Order – with the new Class E encompassing retail, commercial, business and service uses – provide greater flexibility and will make it easier to co-locate two or more asset classes within the same premises.

Meanwhile uses

- Markets have always been an important part of many city and town centres, and bring animation and vibrancy which traditional high streets often lack. Eastbourne Borough Market on Terminus Road is an example of this,

as it creates a busy atmosphere along this retail parade when active on Wednesdays and Saturdays, and Seafront Market – whilst not creating the same level of footfall – also successfully enlivens the seafront around the pier.

- New ways of generating activity and engaging with town centre users have emerged in recent years in the form of pop-up shops and other uses including flexible workspaces (e.g. Foundry in Eastbourne Town Centre as mentioned previously). As well as addressing vacant or under-utilised space and tapping into local entrepreneurialism, they help to deliver a bespoke retail experience and often become permanent attractions.

Eastbourne Local Market

Eastbourne Town Centre within this section is as defined by the Eastbourne Town Centre Local Plan (November 2013). The town's retail catchment area is relatively affluent, ranking 98 of the PMA "PROMIS" centres based on 2011 census data, and per capita total retail spending levels reflect this demographic profile as they are above the PROMIS average for the UK. Similarly, Eastbourne has a slightly above average volume and quality of retail provision relative to the size and affluence of the shopping population according to PROMIS data, and the town centre faces below average competition from competing retail centres.

As highlighted in the UK market context section above, retail rents across the UK have been in decline for a number of years due to pressures on the high street from online shopping, and more recently from the pandemic. Promis data indicates Eastbourne's retail property market has proven to be relatively resilient to this, as the approximate rate of rental decline has been 30.4% since 2017, compared with 34.9% for the UK average.

Retail vacancies in Eastbourne were slightly elevated relative to the five-year average during the fourth Quarter of 2022, but have remained effectively unchanged from this time last year. According to PMA Promis data, the vacancy rate in Eastbourne town centre was at 15.9% of all units, compared with an average of 19.1% for the UK as a whole.

Eastbourne town centre's retail market remains characterised by weak occupier demand and ongoing rent renegotiations as occupiers seek to reduce their occupational costs. This is reflected in Costar's data for the town, which indicates retail rents have slipped by 0.5% over the past year.

There has been a persistent lull in retail development in the town, with no new space delivered in the previous three years, and until November 2022, nothing was underway or in the planning pipeline. However, in November 2022 an application (ref: 220849) was submitted for a new c. 19,000 sqft Aldi store with 130 accompanying parking spaces on the development site on Sovereign Harbour Retail Park's north western boundary, on Pacific Drive/ Martello Roundabout. A further change of use application was submitted at Sovereign Harbour Retail Park to convert the existing – but vacated – cinema unit into a B&M Home Bargains.

Retail investors are reasonably active in Eastbourne and market pricing sits at £207 psf, which sits significantly above East Sussex's average pricing for retail/ leisure investment £188 psf².

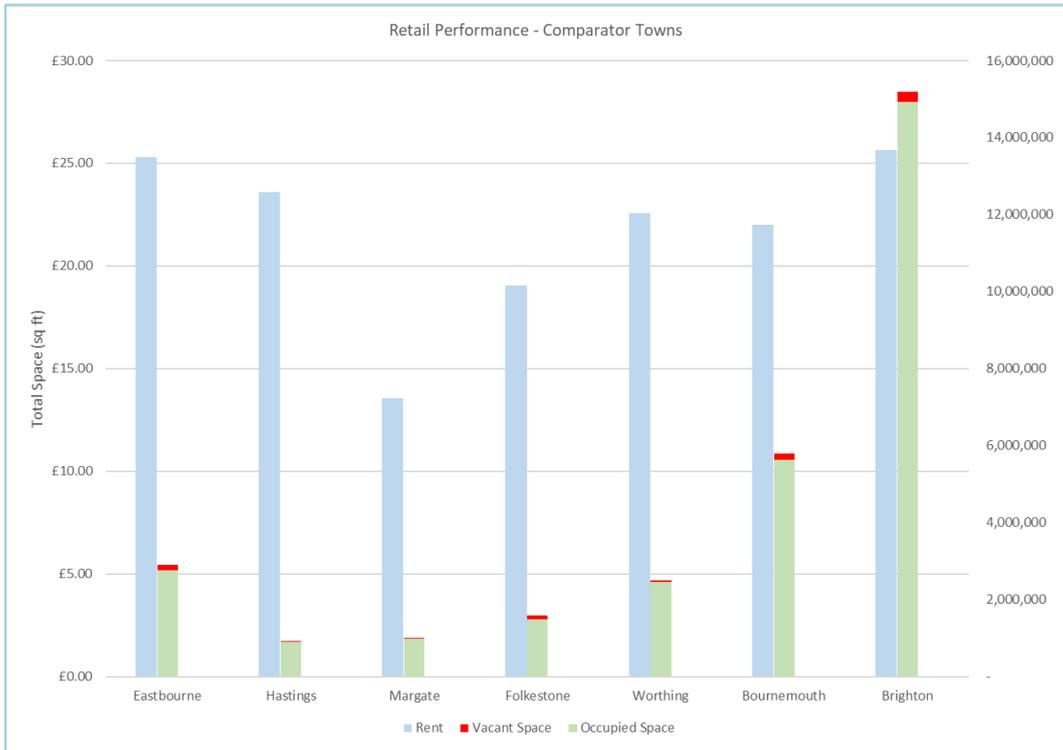
Comparator Town Analysis

We have sought to analyse how Eastbourne performs in comparison with a variety of similar towns and cities nearby in order to provide additional context. This section will seek to provide that contextual basis through data, whilst identifying any notable points that we consider to be of value. It is important to note that all data within this subsection is sourced from Costar, and relies on the Costar town centre market boundaries. We have provided a map of these boundaries in appendix i.

Firstly, we have sought to understand the strength of Eastbourne's retail market in comparison with those similar towns, for which we have used the average rent on a £psf basis, the total amount of floorspace within each centre, and the vacancy rate for each centre, all of which is included within figure 01 below.

² Costar Data

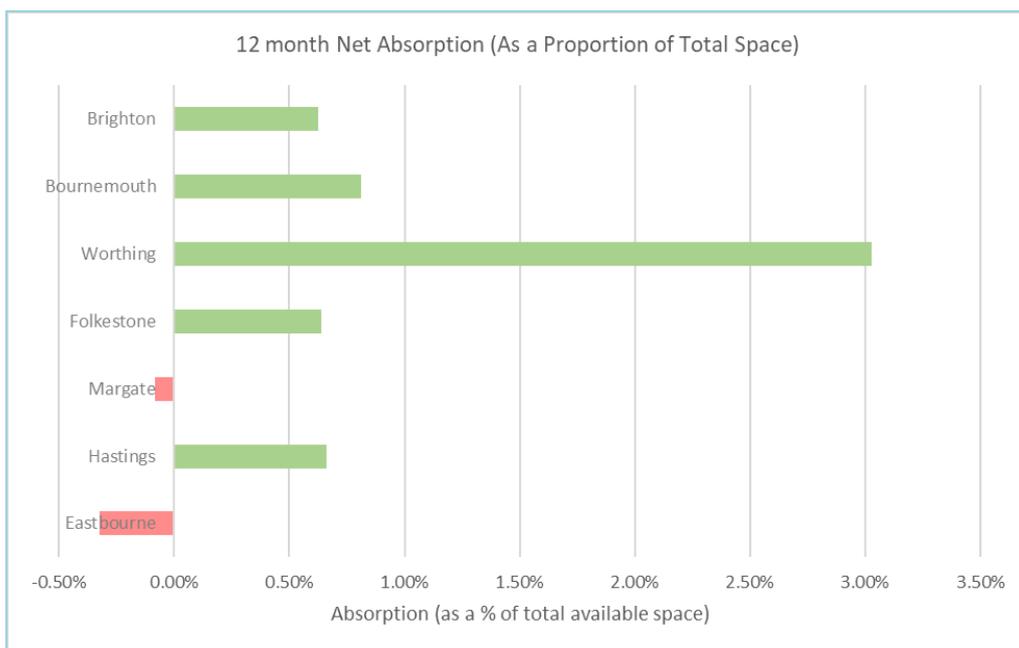
Figure 01 – Retail Performance: Comparator Towns



Of particular note in this graph is that Eastbourne’s average rent is among the highest of all the comparator towns at £25.31 psf, which is almost as high as Brighton’s at £25.64 psf. This is the second highest rent of all the towns, and shows that – even though it has the third-highest town centre provision, which can lead to over-supply and therefore reduced rents – it is performing strongly. In spite of this strong rental performance, the town still has the second-highest vacancy rate, second only to Folkestone, something which may in part be explained by figure 02.

Figure 02 highlights the amount of space vacated vs. the amount let in the past 12 months, as a proportion of the total space within the centre to provide context. As this demonstrates, Eastbourne has seen the highest proportion of its retail stock vacated without being replaced by new lettings of all the town centres, and is one of only two that has seen negative absorption in this timeframe.

Figure 02 – Twelve Month net Absorption, as a proportion of total office space for comparator towns



Whilst the space vacated amounts to only 9,400 sq ft, it is potentially a concern that in the period where there is a demonstrable uptick in lettings throughout the vast majority of the comparable centres post-covid, Eastbourne does not seem to have been able to attract tenants. In fact, in the 12 months prior to the dataset below, there was an additional 44.4k sq ft of negative absorption in Eastbourne, which suggests this is something of a long-term trend, albeit one that has been slowing.

Retail Market Conclusion

In spite of pressures to the wider retail market, the general perception of Eastbourne Town Centre is of one that remains healthy and performs well, and pointed investments such as those directed towards improving the Beacon and its surroundings that completed in 2018 have effectively contributed to making the most central shopping areas appealing places to spend time.

Whilst the general perception of the town's principal retail areas is positive, the UK-wide context for retail has been challenging for a long time: a situation that was only exacerbated by the Pandemic, and this sector is likely to be exposed as much as any other to the burgeoning cost of living crisis that is anticipated to affect the UK this winter.

These market pressures are manifesting in Eastbourne through elevated vacancy rates in some character areas, and as such it is our view that the size and overall provision of retail within Eastbourne Town Centre should be considered carefully in order to ensure provision does not significantly outstrip demand.

Eastbourne Town Centre in particular has a fair amount of near-prime vacant space (in particular the former Debenhams and TJ Hughes Stores) that has scope to be improved and subsequently brought back into use. However, it is inadvisable for such a large amount of space to be returned to the market as retail in current conditions. This is a position reflected by the recent application for the TJ Hughes building, which proposes to deliver 65 flats plus c. 7,650 sqft Class E space at ground floor; a reduction in the overall retail provision of c. 11,650 sq ft.

Retail development is rarely pursued by the market, and new lettings are increasingly under threat from worsening market conditions; therefore any focus on retail within these town centres should prioritise further enhancement and rationalisation of existing provision rather than new development.

Any such intervention within these town centres will need to take a holistic view as to how footfall can be improved, regardless of the size of the individual centre. Whether this is by improving the public realm around the site, increasing the amount of leisure/ diversity of uses to help turn the centre into a 'destination', ensuring an appropriate mix of retail uses that adequately serves the local population (plus any future projected inhabitants when accounting for residential development), or simply improving accessibility to the centre, a carefully laid out plan that understands how footfall can be increased and stays within the town centre extended will be fundamental to ensuring these centres remain healthy.

As such, proposals to extend town centre built environment improvements towards the Terminus Road/ Seafront area, in addition to other initiatives such as hosting the Turner Prize in 2023, should have a similar positive effect as the aforementioned improvements to the Beacon Centre.³

³ This is examined in more detail in Section 10 of this report.

Leisure & Hospitality Market

UK Market Context: Strategic Trends

This year, 23% of PWC's⁴ retail categories are net positive for new openings; however this proportion of positives are not enough to offset the declines within other categories. Of particular note, of these positive categories, leisure accounts for three of the top four fastest growing, as follows:

1. **Takeaways:** These businesses have grown significantly over the last four years due to increasing demand for home delivery initiated in part by the wider acceptance of delivery apps such as Deliveroo, as well as these businesses' ability to operate throughout the pandemic.
2. **Restaurants:** In the last three years, restaurants have been significantly impacted by the difficult operating conditions resulting from the pandemic, leading to numerous CVAs and administrations, which have resulted in mass closures. As the economy has opened up post-pandemic, new businesses have responded to the increased demand, taking advantage of the lower rents available as a result of the number of vacancies caused by the pandemic.
3. **Amusement Arcades:** As with restaurants, amusement arcades have taken advantage of spaces with low rents caused by the pandemic to increase their presence on high streets.

Without services like banks driving regular footfall, and with some parts of retail having permanently shifted online, leisure will likely become one of the most important footfall drivers to some high streets in the future.

As with the aforementioned parts of the leisure market, the UK's hotel market has continued to recover through the first half of 2022. The leisure sector continues to be the sector's main supporter, with weekend trade recovering at a quicker pace thanks to robust domestic demand. In addition to leisure, events-led trade and the return of some business travel has driven much of the resurgence in larger cities, which are likely to continue throughout the remainder of the year. As all pandemic restrictions have been dropped, including those on international travel, those destinations most reliant on international tourism such as London have also seen growth in hotel occupation.

Hotel construction has continued in the past 12 months in response to these positive market conditions, with approximately 12,000 rooms built, and another 95 hotels added to the market. As with the other sectors highlighted in this report however, rising interest rates, increasing costs due to inflation, labour shortages, and supply chain issues are all putting pressure on the sector, meaning both construction and investment transaction activity could be negatively impacted in the coming months.

Eastbourne Local Market

The Leisure market in Eastbourne is intrinsically linked to the retail market as the two uses generally utilise the same spaces within town centres and so rents and yields are generally aligned. The largest proportion of leisure provision in Eastbourne is comfortably restaurants and cafes: GOAD data for the Eastbourne Primary and Secondary Shopping Areas calculates that of 79 leisure units, 51 (65%) are within these two uses, and a further 8 are fast food & take away.

Beyond this food-led leisure sector, there are 13 pubs and bars, 5 bingo/ betting shops/ casinos, and two sports & leisure facilities, as well as one dedicated cinema. This means the total proportion of all occupied retail/ leisure space within Eastbourne's primary and secondary shopping areas (as depicted in Figure 09) that is dedicated to a leisure use specifically is c. 23%, or 19% by floor area.

It is notable however that outside of the GOAD boundaries used, Eastbourne is home to a number of cultural institutions such as but not limited to:

- the Grove Theatre, which is an arts and community venue that regularly stages plays, comedy nights and live music, in addition to showing films and other events;
- the Towner Art Gallery, which is a free gallery housing historic, modern and contemporary art as well as talks, events, creative activities and regular film nights. The gallery has approximately 160,000 visitors a year.
- Congress Theatre
- Devonshire Park Theatre

⁴ <https://www.pwc.co.uk/industries/retail-consumer/insights/store-openings-and-closures.html>

- Winter Garden at Devonshire Park
- Hippodrome Theatre

Eastbourne's hotel market comprises c. 3,000 active rooms across 66 properties, which is an average of approximately 46 rooms per hotel – slightly below the 48 room per hotel average for the UK as a whole. Rates are also similar to the UK market norm, with the ADR (average daily rate) for Eastbourne Town Centre hotels at £83 across the last three years, in comparison with the UK market average ADR of £74.

There is a strong mix of major operators and smaller independent hotels within Eastbourne as well as premium and budget options. The following major operators are present in the town: Bespoke Hotels (the Burlington Hotel: 159 rooms), Elite Hotels (The Grand Hotel: 152 rooms), Leisureplex Hotels (Queens Hotel: 125 rooms) amongst many others including two Best Western hotels, two Premier Inn hotels and a Travelodge.

The Pandemic had a significant impact on the entire hospitality sector, and Eastbourne's hotel market was impacted in much the same way as the UK as a whole. At its worst, hotel occupancies in Eastbourne dropped to a monthly average rate of c. 22% of rooms. However, there have been recent signs of recovery with the relaxing and eventual removal of pandemic restrictions: for example, the 12 month RevPAR (revenue per available room) in Eastbourne has climbed sharply as of July, and is 52.1% higher than the equivalent month in 2021. This is some way behind the wider Sussex/ Surrey market, where the same timeframe has yielded an increase of 109.8%.

Whilst hotel developers remain active within Sussex/ Surrey, with 810 rooms in the pipeline, nothing is currently under construction within Eastbourne itself, and in fact in the previous ten years the amount of stock within Eastbourne has contracted as demolition/ repurposing has outpaced new construction.

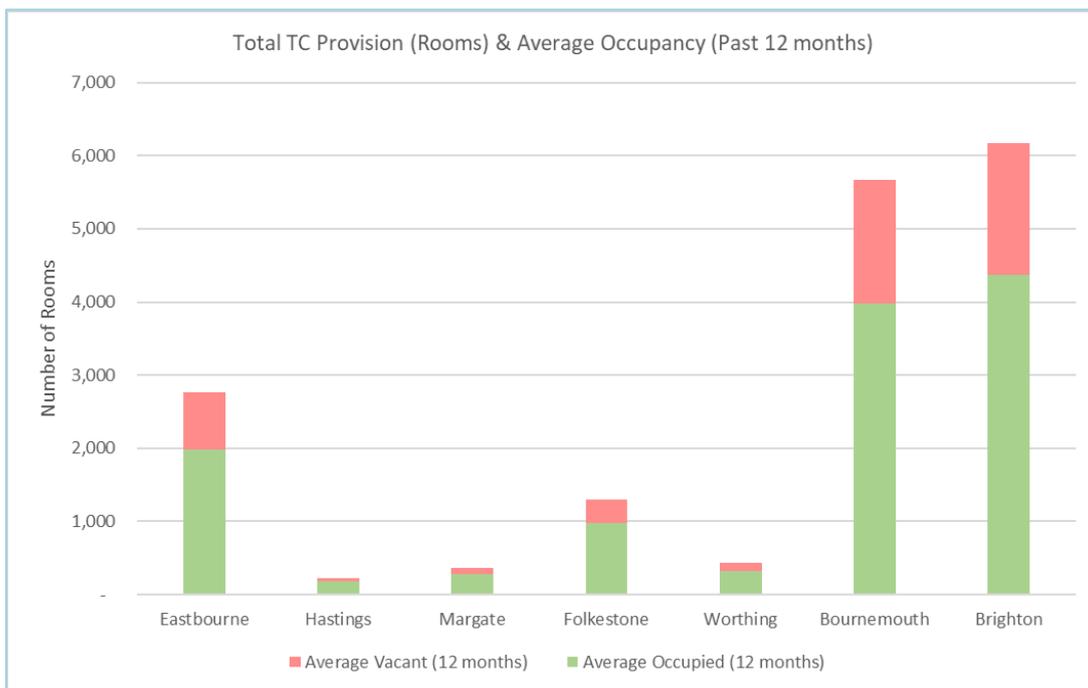
Eastbourne is not among the more actively traded hotel submarkets, and two hotel transactions have taken place in the past year, a figure which is consistent with the number of deals that take place in a typical year.

Comparator Town Analysis

We have sought to analyse how Eastbourne performs in comparison with a variety of similar towns and cities nearby in order to provide additional context. This section will seek to provide that contextual basis through data, whilst identifying any notable points that we consider to be of value. It is important to note that all data within this subsection is sourced from Costar, and relies on the Costar town centre market boundaries.

Figure 03 below shows the total number of rooms available in each of the comparator towns, and the average number of these that have been vacant over the past 12 months. At 71.8%, Eastbourne is slightly below the highest occupancy rates (82% in Hastings, and 75% in Margate and Folkestone), however Eastbourne's performance is strong considering it has c. ten times the number of rooms to fill as Hastings, and more than double the number in Folkestone. Both Brighton and Bournemouth, larger centres than Eastbourne, have lower occupancy rates at c. 70%; all of this indicates Eastbourne has a relatively healthy hotel market.

Figure 03 – Total Town Centre Provision (Rooms) & Average Occupancy (Past 12 months)



A further positive for Eastbourne is the strong recovery that has been made post-Covid; in the twelve months prior to the data within figure 03 above, the occupancy rate in the town was c. 14% lower at 57.1% of all rooms.

These conclusions and the positive story regarding Eastbourne’s hotel market are underlined by the RevPAR (Revenue Per Available Room) for Eastbourne, which at £57 is within £2 of every centre with the exception of Brighton, which has a RevPAR of £74. It is important to note however, in spite of this strong recovery and good performance there is no proposed hospitality space within the Eastbourne pipeline – albeit this is less of a concern given there is no space proposed in any of these towns and cities save Brighton, which has 444 new bedrooms in its development pipeline.

Conclusion

One of the notable factors within the Household Survey (included in full within appendix iii) was the good proportion of shopping trips into Eastbourne that were linked with other activities – of 473 respondents who cited Eastbourne Town Centre as their primary shopping and services location, 200 of those (42.2%) linked this trip to another activity, with 11% of total respondents completing a leisure activity and a further 7% doing non-food shopping. This is a positive as it shows a fair proportion of people are remaining in the town centre beyond their primary reason for visiting, which is generally indicative of a healthy centre; the question for Eastbourne is how this number is increased moving forwards, as it reduces footfall and expenditure spillage to out-of-town shopping parks and/or larger urban centres, thus increasing the vitality of the town.

As highlighted in the Eastbourne Local Market subsection above, the leisure provision in the town as it stands is relatively healthy. The town has several successful art galleries, theatres, and other cultural institutions, and there are a number of destinations in the surrounding area such as Beachy Head, Seven Sisters Country Park, and the De La Warr Pavilion cultural centre, all of which combine to draw visitors to the area. There is a significant provision of hotels within Eastbourne, and the town has recovered relatively well after several difficult, pandemic-impacted years.

As such, much of the infrastructure is already in place for the town to both attract and accommodate a significant number of visitors to the area. The questions for how to improve the leisure and hospitality provision in Eastbourne should therefore centre around how these cultural institutions can be built upon and marketed to increase their impact on the number of visitors to the area. These improvements should also positively impact the wider town centre performance as a way of increasing footfall to the centre, and of increasing the amount of time spent within the centre per-visit.

Office Market

UK Market Context: Strategic Trends

Whilst prime office locations within cities such as London, Bristol and Cambridge have seen office take up rebound strongly since the loosening of pandemic restrictions, demand in the UK outside of these markets has remained subdued. Businesses vacating space coupled with weak demand has led to vacancy rates increasing UK-wide, with national rates currently at a six-year high of 6.9%. The presence of approximately 31.1 million sqft of additional office space in the pipeline – the majority being delivered in the next 18 months – means at a minimum this rate is unlikely to improve in the near future, and will likely grow.

Office rents fell sharply during the pandemic, although as with vacancy rates these have stabilised in prime city centre locations, in particular as a result of an increase in demand for high-quality, well-ventilated space that performs well from an ESG (Environmental, Social and Governance) perspective. Much of this has been driven by the technology media and telecom, life sciences and professional services sectors, all of which remained relatively resilient through the pandemic.

Investment rose to a three-year high in the first quarter of 2022, although as with rents and vacancy rates, this rebound is predominantly led by the UK's largest cities, with smaller regional cities and towns lagging some way behind.

Eastbourne Local Market

Eastbourne's office market contains approximately 970,000 sq ft of space, which makes it a small market relative to the national average. The vacancy rate in Eastbourne has risen significantly over the past 12 months, and at 13.5%, is the highest it has been in over a decade. There are very few large businesses with headquarters in Eastbourne; some of the larger tenants in the area in terms of floor area are Jobcentre Plus (30,000 sq ft), Brewers Decorator Centres (27,000 sq ft at Albany House), and the Department for Work & Pensions (18,000 sq ft at 1 Grove Road). These tenants are outliers, with the vast majority of occupiers in Eastbourne are small and typically occupy space under 6,000 sq ft.

Net absorption – the amount of space let compared with the amount vacated – was negative over the last 12 months, meaning more space has been vacated than has been let. This is a continuation of a longer term trend: absorption has averaged a decline of c. 18,000 sq ft per annum across the previous five years. Conversely, rents have increased by 3.1% in the past 12 months, in excess of the 2.6% average annual gain over the past decade, albeit on the back of a period of abnormally high decline during the pandemic.

According to commercial monitoring data provided by Eastbourne Borough Council, approximately 615,000 sq ft of office space was lost to office to residential conversions between 2010 and 2021, which is an average of 61,500 sq ft per annum. Of note, the second highest annual loss of office space took place in 2020/21, when both 20 Upperton Road (21,500 sq ft) and Berkeley House (19,800 sq ft) completed. The total office space loss in 2020/21 at 81,000 sq ft is the second-most space lost in a single year, with the largest single year's loss at 142,000 sq ft.

There are no pressures on the vacancy rate from an office supply perspective as there is nothing under construction in Eastbourne, with little in the planning pipeline. Only one office investment transaction has traded in the past 12 months, and only a handful of properties typically trade here in an average year.

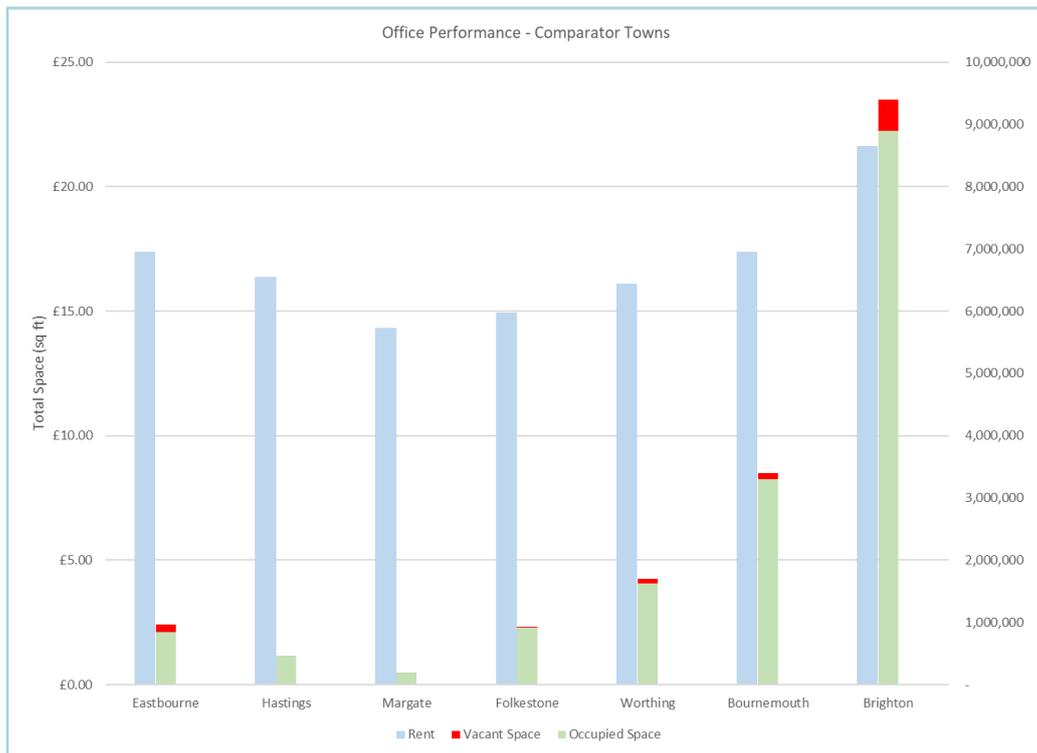
Comparator Town Analysis

We have sought to analyse how Eastbourne performs in comparison with a variety of similar towns and cities nearby in order to provide additional context. This section will seek to provide that contextual basis through data, whilst identifying any notable points that we consider to be of value. It is important to note that all data within this subsection is sourced from Costar, and relies on the Costar town centre market boundaries.

Firstly, we have sought to understand how Eastbourne's office market performs by undertaking analysis of some key market performance statistics: Total floor area, vacancy rate and average market rent, all of which have been summarised in figure 04 overleaf.

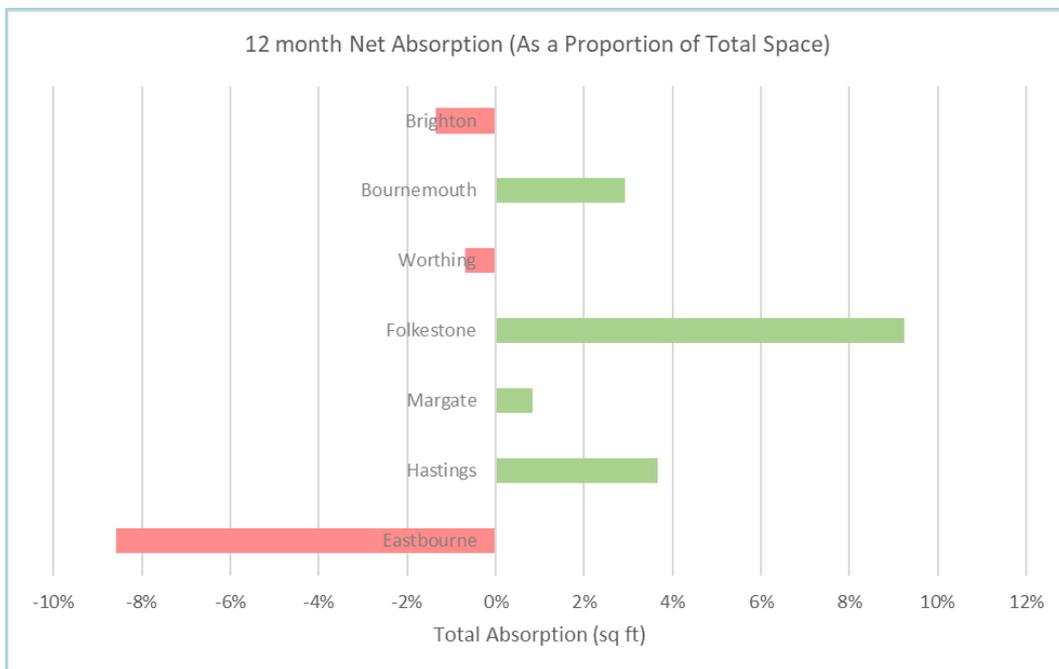
The overall provision within the town is – at 966,000 sq ft across c. 12 square miles – broadly the same as the similarly sized Folkestone. However, its vacancy rate is notably higher at 13.3% compared with 2% in Folkestone. In fact, Eastbourne's office market has by some distance the highest office vacancy rate, with the next highest – in Brighton – being 5.4% of over 9.4 million square feet of space.

Figure 04 – Office Performance: Comparator Towns



Furthermore, as with the retail, the twelve month net absorption rate for office space in Eastbourne is significantly higher than all other centres relative to its size, as demonstrated by Figure 05. Over 83,000 sq ft of office space has been vacated above the amount of space being let in Eastbourne, which is c. 9% of the total stock in the town. This is a 470% increase in the absorption rate versus the year prior, when the net absorption was just 14.6k sq ft.

Figure 05 – Twelve Month Net Absorption (As a Proportion of Total Office Space)



Conclusion

There is very little office space in Eastbourne relative to the national average, and it is not the primary market in East Sussex; Brighton in particular has a significantly larger stock of office space. As such, and on the basis that the vacancy

rate in the town has been increasing to record levels recently, it is unlikely that the town centre will see significant office development in the foreseeable future.

Residential Market Assessment

This section of the report provides an analysis of the housing market in Eastbourne, with a particular focus on recent house price changes and trends, and how these interact with the Eastbourne Housing Planning Policy documents. The information collected within this section will be used to further bolster the analysis within the report, as high demand and opportunities for population growth within the town has the potential to positively influence the growth and development of Eastbourne’s centres.

Figure 06 – Quarterly House Price Change vs. Average House Price: Eastbourne Borough Council Area & UK (UK Land Registry Data)



This graph demonstrates that the Eastbourne Borough Council area has seen a slower rate of house price growth than the majority of the UK, and having been slightly above the average house price for the UK as a whole from Q3 2018 through to Q2 2020, this slower growth has seen the gap narrow up to Q3 2022.

This makes residential property values in Eastbourne lower than the majority of surrounding Council areas, with the exception of Hastings see figure 07 (overleaf). House value growth follows a similar pattern, where Eastbourne has the lowest growth rate (18.2%) over the same period of all these councils, with Rother having the highest growth of all these boroughs at 27.62%.

Figure 07 – Annual House Price Growth: Comparator Towns (UK Land Registry)

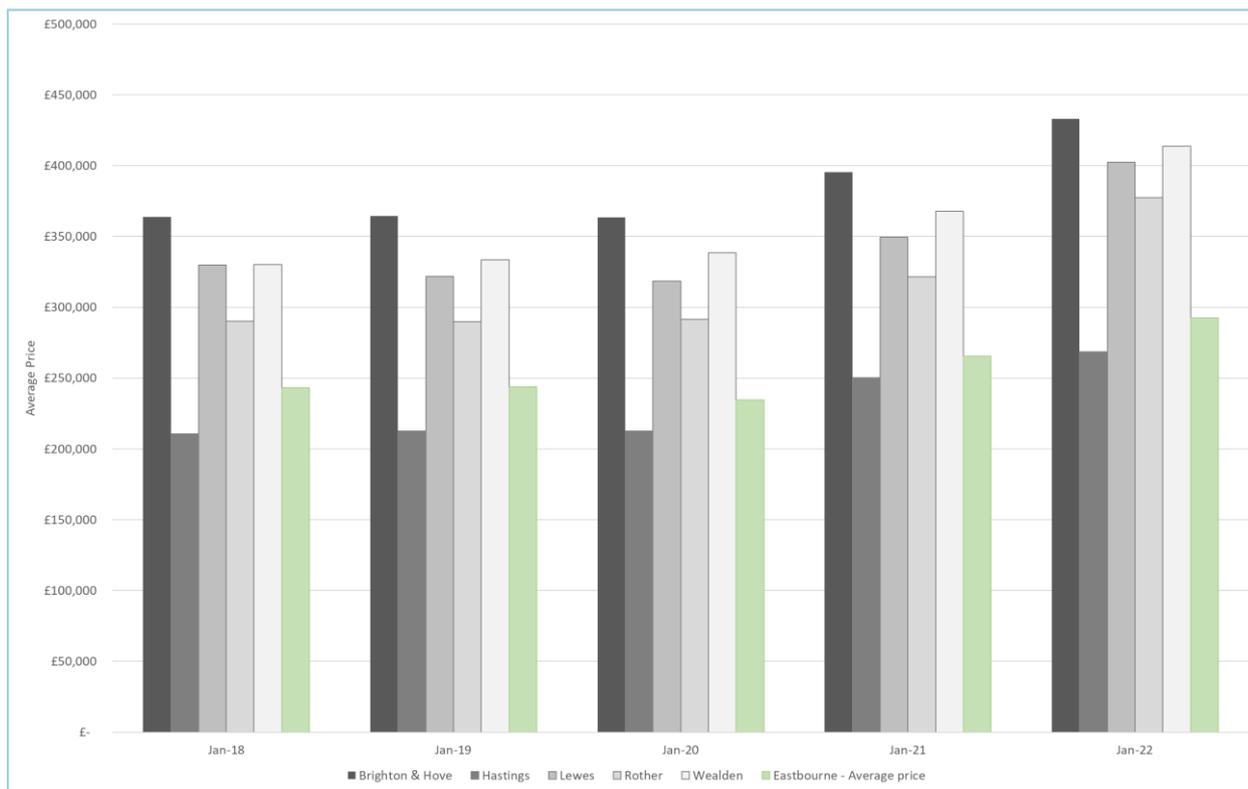
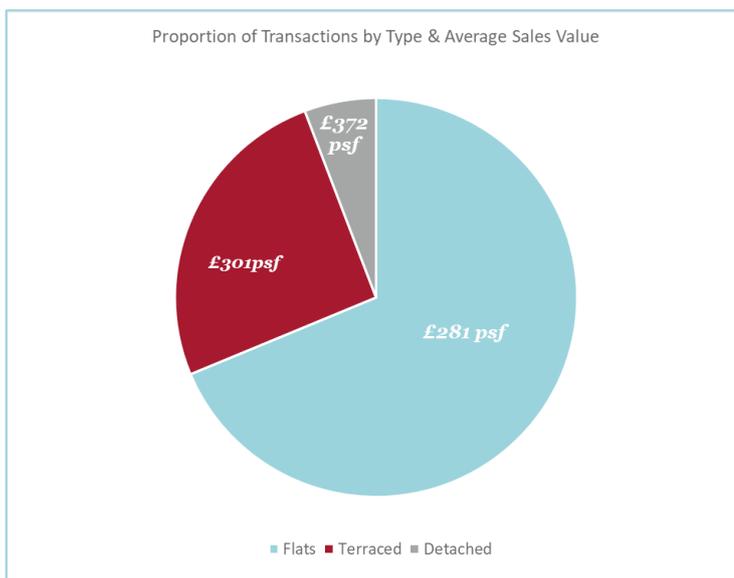


Figure 08 – Proportion of Transactions by Type & Average Sales Value (Eastbourne) (UK Land Registry)

As the pie chart to the right shows, the vast majority (69%) of transactions that have taken place since the start of 2021 within a mile of Eastbourne Town Centre are flats, with 26% comprising terraced housing and the remaining 6% being detached or semidetached houses.

This is most likely a function of a combination of the character of the stock in the area, plus demographics; the majority of housing stock is terraced houses, and a large proportion of this has likely been segmented into flats, or is newer housing that generally within town centres will be flatted development due to restricted space.

Sales values on a £ per square foot (£psf) rate for terraced houses and flats are £301 and £281 psf respectively, a difference of c. 7%. Whilst we would generally expect £psf rates to be higher in flats than houses, reflecting their smaller size and thus lower capital values,



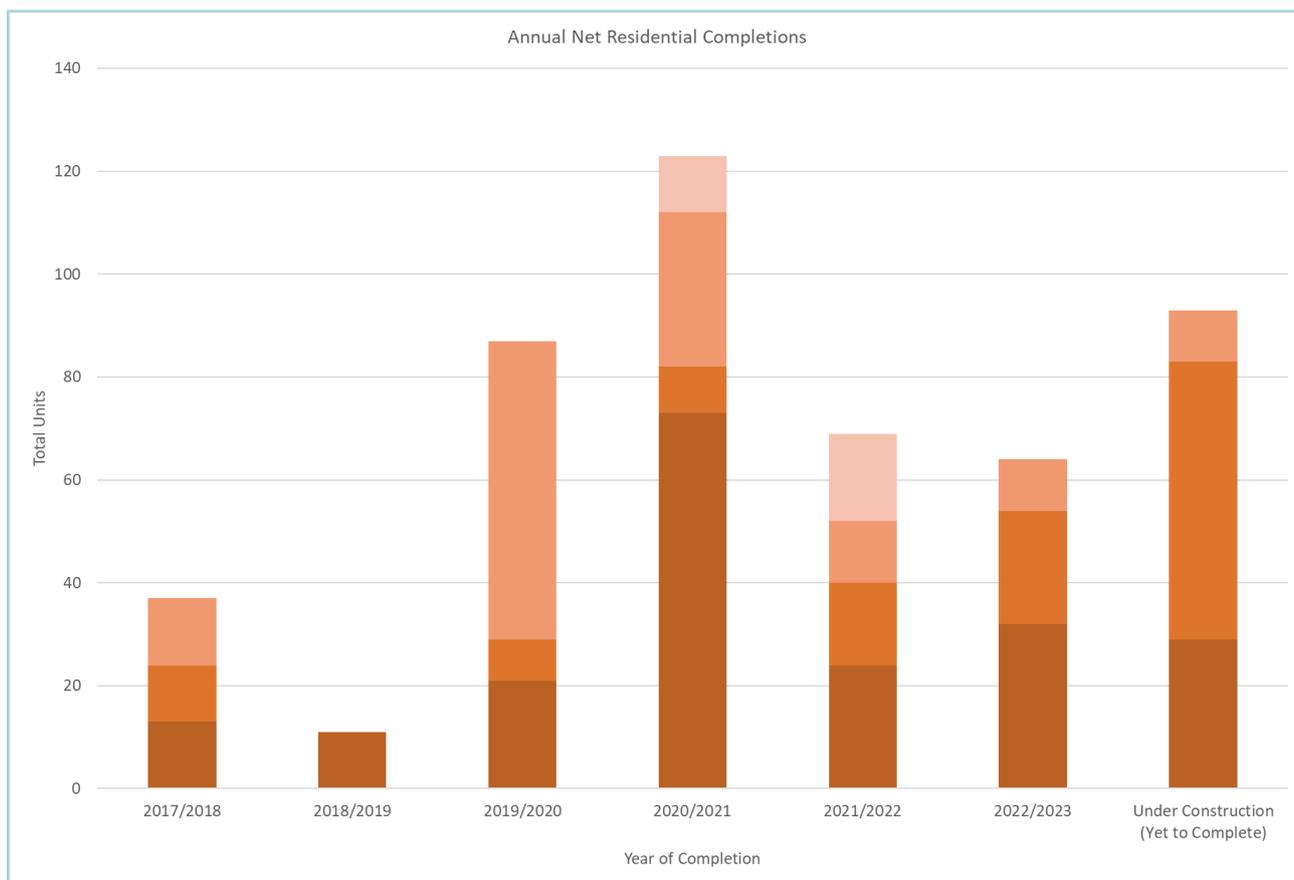
suppressed flat values on a £psf basis relative to terraced and detached/ semidetached houses as seen here can be an indication that flats are not appealing to the market relative to houses, however given the proportion of flats sold to other typologies in this location this does not appear to be the issue.

From a supply side perspective, there have been a number of residential planning applications in the past five years, with 11 sites (of over 10 units) having delivered 278 total units in the same mile radius from Central Eastbourne. A further 19 sites (again, of over 10 units) have planning permission within this same area, with the potential to deliver a further 539 units, and three further applications have resolution to grant subject to section 106, with the potential to deliver a further 301 units.

On an Eastbourne-wide scale (including those summarised above), applications total a potential 1,540 net new residential units, of which 452 have been completed, leaving 1,088 units outstanding. Of the total Net units to have obtained planning permission, 458 were either conversions or PDR changes of use of existing buildings to residential. Of the net completed units, 187 or 41% of these were PDR.

Figure 09 shows the number of residential units completed each year in Eastbourne; each shade of orange in an individual bar of the chart comprises a different development. This demonstrates the peak delivery in Eastbourne in the past five years was the 123 units delivered across four sites in 2020/21, but also that – subject to those units that are under construction finishing before the end of 2023 – 2022/23 will be the most productive year for new residential construction, with 157 new units delivered across six individual schemes.

Figure 09 – Annual Net Residential Completions since 2017/18



Much of the proposed future residential development for the wider town is concentrated on the outskirts, with several applications around Polegate/ Lower Willingdon and east of North Langney, albeit these are outside of the Eastbourne Borough Council boundary in Wealden. These proposals amount to a pipeline of several hundred new homes, predominantly comprising semidetached estate housing rather than flats.

Whilst there is a relatively small amount of housing currently in the planning pipeline, the Eastbourne Local Plan: Growth Strategy Consultation (November 2022) has identified provision for 6,401 new homes (equivalent to an average of 320 new homes per year) over the plan period between 2019 and 2039, including the 557 new homes built in the first three years of the plan period (2019 – 2022).

The Land Availability Assessment (November 2022) (“LAA”) has identified 197 sites that could deliver homes, and these are broken into three site types as follows:

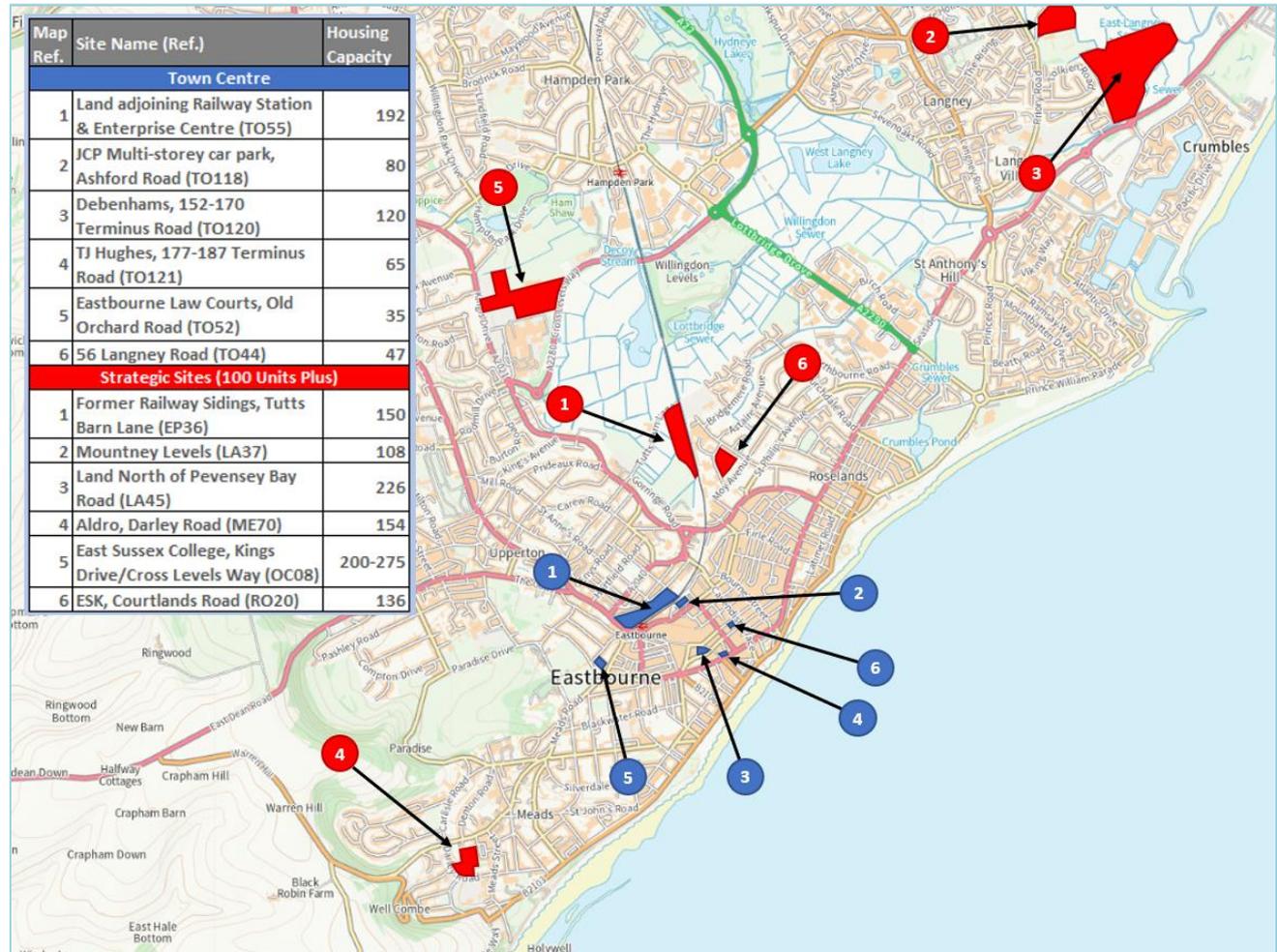
- 137 small sites (providing less than 10 homes each) within the existing built-up area that have the potential to provide 407 homes via ‘infill’ or redevelopment of existing sites
- 38 medium-sized sites (providing between 10 and 25 homes each) within the existing built-up area that have potential to provide 564 homes via ‘infill’ or redevelopment of existing sites

- 22 large ‘strategic’ sites that have potential to accommodate 2,523 new homes and 53,000 sqm of employment space through redevelopment of existing sites and extensions to the built-up area

We have identified the following sites within the LAA – the town centre site are defined for this purpose as being assessed as capable of delivering over 30 units in the LAA, and the wider Strategic Sites are those assessed within the LAA as being capable of delivering over 100 units. All of the sites summarised in Figure 10 are also assessed as being either “Developable” or “Potentially Developable” in the LAA.

This pipeline of developable or potentially developable sites set out in figure 10 totals c. 1,500 – 1,600 units until 2039, with the remainder of the developable sites – particularly in the town centre – generally having the capacity to contribute significantly lower numbers of new houses to the development pipeline.

Figure 10 – Town Centre & Strategic Residential Development Sites (Source: LAA)



4. TOWN CENTRE HEALTH CHECKS

Introduction

This town centre health check audit has been informed by our own site inspections that were conducted in September 2022, and these inspections have been bolstered with various data sources including but not limited to Experian GOAD, the Property Market Information Service (“PROMIS”) reporting, COSTAR data, and town centre data collected and supplied by Eastbourne Borough Council.

This section covers the following centres:

- Eastbourne Town Centre
- Green Street (Albert Parade)
- Hampden Park (Brassey Avenue)
- Langney Shopping Centre
- Meads Street
- Old Town (Crown Street)
- Seaside (Langney Road to Springfield Road)
- Sovereign Harbour Retail Park
- Rodmill
- St. Anthony’s (Beatty Road)
- Seaside (Seaford Road to Channel View Road)
- The Broadway (Hampden Park)
- Queens Parade (Hampden Park)
- Old Town (Victoria Drive)
- Grand Hotel Buildings (Meads)
- Carlisle Road (Meads)
- St. Anthony’s (Winston Crescent, Including Lidl)
- Cavendish Place (Town Centre)

This section of the report has regard for the health check indicators as follows:

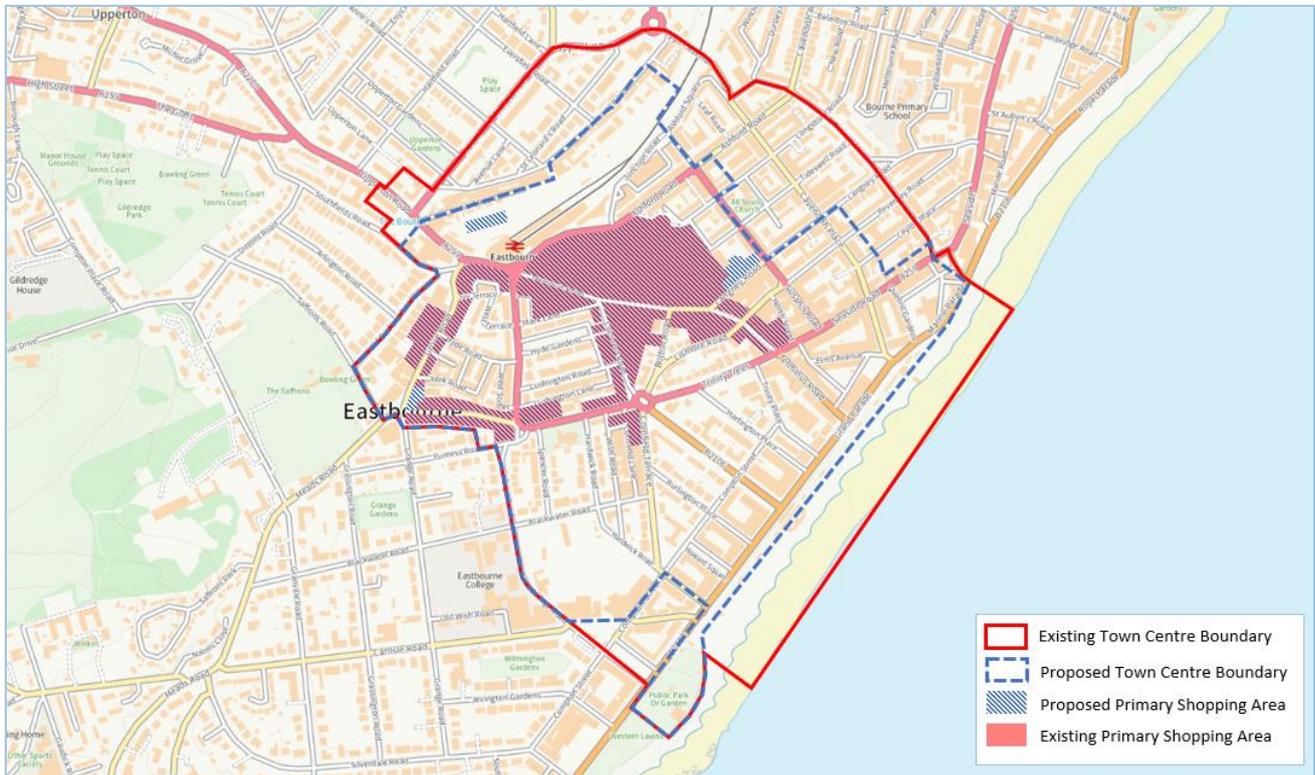
- Diversity of Uses
- Vacancy Levels
- Commercial Rents
- Retailer Representation & Demand
- Customers’ Experience & Behaviour
- Accessibility
- Environmental Quality
- Perception of Safety
- Opening Hours & the Evening Economy, and
- Barriers to Business Investment

Eastbourne Town Centre

Introduction/ Context

Eastbourne Town Centre is the principal focus for shopping, leisure and business activity within the wider Eastbourne Borough Council area. The town centre is subdivided into two retail areas, the Primary and Secondary Shopping Centres as defined within the Eastbourne Town Centre Local Plan. These two areas are displayed in the map (figure 11) below.

Figure 11 – Eastbourne Primary and Secondary Shopping Centre Boundaries⁵ With Proposed C&W Amends



For the purposes of this report, we have combined these two centres into one large retail area, and we have assessed that area’s viability and vitality within this section. As Eastbourne Town Centre is one town centre, and national policy no longer requires/ supports the definition of primary and secondary frontages, it is appropriate to define a “Town Centre” boundary and a “Primary Shopping Centre” for this Centre rather than the previously defined primary and secondary centres.

Diversity of Uses

Eastbourne Town Centre houses several distinct shopping areas within its boundaries, which combined create a very diverse town centre. To accurately and completely describe the diversity of uses present within the town centre, we have therefore split the town centre into various “character areas” which are described and analysed within the following subsections.

⁵ https://www.lewes-eastbourne.gov.uk/_resources/assets/inline/full/0/259253.pdf

The Beacon Shopping Centre and Surrounds

The “Beacon Shopping Centre and Surrounds” character area has been depicted in figure 12 below. The shops that form this character area have been highlighted in orange.

Figure 12 – The Beacon Shopping Centre and Surrounds Character Area



The main area in terms of both density of retail and of concentration of shoppers is the Beacon Shopping Centre – this shopping centre contains approximately 96 units at ground level⁶.

We consider it appropriate to include the area directly surrounding the Beacon within this character area for a number of reasons. Firstly, its shops abut the Centre and interact directly with the Centre’s entrances and exits; secondly, it has a clear interaction with the centre caused in part by its location, and also by virtue of the pedestrianised street that links the shops to the centre.

Figure 13 – The Beacon Shopping Centre and Surrounds Retail Composition (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 76 | 51% | 294,300 | 62% |
| Convenience | 8 | 5% | 28,400 | 6% |
| Retail Services | 11 | 7% | 15,700 | 3% |
| Leisure | 20 | 13% | 38,600 | 8% |
| Financial & Business Services | 12 | 8% | 40,500 | 8% |
| Vacant | 22 | 15% | 61,000 | 13% |

As this table demonstrates, there is a relatively varied breakdown of types within the Beacon and Surrounds character area, but understandably with a particular focus on comparison goods given the majority of this town centre area is predominantly formed by the Beacon shopping centre.

⁶ Experian GOAD Data

This centre does include one large format food store in Sainsbury's, and whilst the Marks & Spencer store within the centre does have an extensive food section, it has been assessed as a variety store due to its greater proportion of other – predominantly comparison – goods for sale.

A notable point is the vacancy rate within the centre specifically, which is 17% of units and 13% of floorspace. Whilst this is higher than the average for the various centres within this report assessing Eastbourne, including the Beacon Shopping Centre and Surrounds in its entirety (Figure 13), it is still close to the Local Data Company & BRC UK average vacancy rate for shopping centres on a per unit basis, which is 19.1%.⁷

As upper floor uses are not counted within GOAD data, a cinema on the upper floors of the centre has been excluded from this analysis; clearly this would add a significant boost to the proportion of leisure within the centre on a floorspace basis. Without the inclusion of the cinema, the remaining included leisure is almost entirely composed of a combination of cafes, restaurants and takeaways.

Terminus Road branches south into Cornfield Road at the middle of the Beacon Centre and – although this road does not clearly fit into either the Beacon Shopping Centre and Surrounds Character Area, nor any of the other Character Areas described in this section – we have chosen to include a short analysis of its provision for completeness as it does contain a small amount of retail, was previously included in the Secondary Retail shopping centre (as depicted in Figure 09), and is in a very central location within Eastbourne. This location is depicted in Figure 14 below.

Figure 14 – Cornfield Road



⁷ As at Q1 2022: <https://www.localdatacompany.com/blog/press-release-brc-ldc-vacancy-monitor-q1-2022>

Figure 15 – Cornfield Road Retail Composition (Experian GOAD Data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 7 | 19% | 12,600 | 21% |
| Convenience | 2 | 6% | 7,900 | 13% |
| Retail Services | 5 | 14% | 4,500 | 8% |
| Leisure | 8 | 22% | 17,800 | 30% |
| Financial & Business Services | 10 | 28% | 10,900 | 18% |
| Vacant | 4 | 11% | 6,200 | 10% |

There are 36 retail units on Cornfield Road, and these are relatively evenly spread between different uses. The only outliers are:

- Financial and Business Services, which has 28% of all units on the street, the vast majority (8 units) of which are estate agents.
- Leisure, which has 30% of the space on Cornfield Road on a floor area basis, which is slightly skewed by the presence of one very large (8,300 sq ft) pub; the average unit size on this street is significantly lower at c. 1,660 sq ft.

Terminus Road: Former Debenhams Building to the Seafront

The “Terminus Road: Former Debenhams Building to the Seafront” character area has been depicted in figure 16 below. The shops that form this character area have been highlighted in orange.

Figure 16 – Terminus Road: Former Debenhams Building to the Seafront



This shopping area extends from the Beacon Shopping Centre on towards the seafront. In part as a result of the number of retail units within this character area, there is a diverse spread of retail activity, although there is a particular focus on comparison goods and leisure uses. Perhaps slightly symptomatic of the lack of vitality of this portion in comparison with some other parts of the town centre area assessed within this report is the significant number of those comparison shops that are charity shops – of the 14 shops, eight are charity shops.

On the other hand, there are a significant number of leisure uses within this area, with a broad mix including numerous restaurants, cafes, takeaways, bars and pubs.

The main concern in this location is the very high vacancy rate on a floor area basis. Whilst there are only nine vacant units (16%), these units comprise nearly 50% of the overall floorspace provision; this is largely due to the presence of two vacant former department store buildings: the former Debenhams and TJ Hughes buildings both occupy large frontages at anchor locations on Terminus Road, and due to their size will be very difficult to let in their current formats.

A positive for this area that is not captured within GOAD data is a regular market that runs along part of Terminus Road, and a further market at the end of Terminus Road along the seafront, both of which help to enhance the diversity and vibrancy of this part of the town centre.

Figure 17 – Terminus Road: Former Debenhams Building to the Seafront Retail Composition (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 14 | 25% | 24,300 | 18% |
| Convenience | 4 | 7% | 4,800 | 3% |
| Retail Services | 3 | 5% | 2,800 | 2% |
| Leisure | 26 | 46% | 43,200 | 31% |
| Financial & Business Services | - | 0% | - | 0% |
| Vacant | 9 | 16% | 62,800 | 46% |

Station and Surrounds

The “Station and Surrounds” character area has been depicted in figure 18 below. The shops that form this character area have been highlighted in orange.

Figure 18 – Station and Surrounds Area



We have defined this area as extending between Gildredge Road to the east and Station Parade and Southfields Road to the west, and it also includes the Enterprise Shopping Centre. As with the majority of Eastbourne town centre this location benefits from a high level of diversity, with a relatively even split of comparison and retail services. There is a high proportion of leisure in this area, some of which is cafes serving the station, and a large proportion of which is a mix of cafes, restaurants and take aways along Station Parade and Grove Road.

Figure 19 – Station and Surrounds Area Retail Composition (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 18 | 23% | 15,400 | 17% |
| Convenience | 5 | 6% | 4,100 | 5% |
| Retail Services | 17 | 22% | 26,100 | 29% |
| Leisure | 24 | 31% | 32,900 | 37% |
| Financial & Business Services | 4 | 5% | 4,400 | 5% |
| Vacant | 10 | 13% | 6,700 | 7% |

Little Chelsea (Grove Road and South Street):

The “Little Chelsea” character area, which is formed of Grove Road and South Street, has been depicted in figure 20 below. The shops that form this character area have been highlighted in orange.

Figure 20 – Grove Road and South Street Area



The Little Chelsea town centre area comprises predominantly smaller retail units, and as with the other distinct areas of Eastbourne Town Centre, this area has a high level of diversity in part as a result of the large amount of retail provision meaning there are ample opportunities for different types of retail and leisure businesses to move to the area. There is a relatively even spread of uses between comparison, retail services and leisure, and the majority of this retail space is independent businesses at approximately 80% of the total let units.

Figure 21 – Little Chelsea Retail Composition (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 33 | 29% | 38,100 | 21% |
| Convenience | 8 | 7% | 17,100 | 10% |
| Retail Services | 28 | 24% | 33,700 | 19% |
| Leisure | 25 | 22% | 41,900 | 24% |
| Financial & Business Services | 12 | 10% | 25,500 | 14% |
| Vacant | 9 | 8% | 21,800 | 12% |

These different shopping areas combine to create a high level of diversity from a retail perspective. There are a number of different retail uses, with a strong presence of convenience and comparison, multinational and independent, and also a strong leisure provision, which generally skews towards restaurants, takeaways, cafes and bars.

Beyond the retail uses covered in Figure 21, there are a number of other use classes in this character area that further enhance its diversity, such as the Town Hall, Eastbourne Library (not highlighted in Figure 20 but on the edge of this character area), and Grove Road Baptist Chapel.

Eastbourne Town Centre: Diversity Of Uses Conclusion

All successful and vibrant centres require a balanced mix of uses to promote linked trips and keep visitors in the town centre for an extended period of time. Whilst Eastbourne does contain a large amount of high street retail, this is balanced by a wide variety of leisure uses, including those such as the Cinema in the Beacon and a number of significant cultural institutions just outside of the town centre boundary that help to drive visits and activity, such as the Grove Theatre and the Towner Art Gallery – the latter attracts approximately 160,000 visitors a year.

Away from retail and leisure, Eastbourne Town Centre does contain some office space with both private and public sector tenants, however it is not a major office location: The principal tenants in Eastbourne are summarised in the Office Market section of this report above. This means that whilst it may not have benefitted hugely from a significant inflow of office users into the town in the past, it has equally been less impacted than other more office-focused locations by changes in the way people work post-pandemic and the increase in the proportion of people working from home.

On the other hand, as a major seaside town with a significant number of small hotels, Eastbourne was likely disproportionately impacted compared with many other similarly sized towns by pandemic restrictions on travel. However, these restrictions have now been removed entirely and unlike with working from home, a significant long-term reduction to travel numbers is unlikely to have been initiated by those restrictions as the former initiated a cultural change to the way people behave, whereas the latter – if anything – has resulted in an increased number of people holidaying in the UK.

Vacancy Levels

GOAD data identifies 97 vacant units within the whole town centre area, which equates to a 14% vacancy rate on a per unit basis. This is lower than the Retail PROMIS 200 centres average vacancy rate of 19.1%, also assessed on a per unit basis.

Of particular note within Eastbourne Town Centre is the variance in vacancy rates in different parts of the Town Centre. As explained in the Diversity of Uses section above, we have identified a number of varied character areas within the Town Centre, and each of these has quite different vacancy rates.

For example within the Beacon shopping centre, the average vacancy rate per unit is the highest of any of these character areas at 20%, significantly higher than the lowest vacancy rate of 8% in the Grove Road and South Street area.

Another particular outlier from a vacancy rates perspective is the Terminus Road: Former Debenhams Building to the Seafront character area, where the vacancy rate is low compared with the UK average on a per unit basis at 16%, but is significantly skewed upwards on a floor area basis to 46% due to the presence of two very large, vacant former shopping centres within this character area.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

PROMIS reports that prime town centre rents in “mid-2022” were £80 psf In Terms of Zone A (ITZA), which compares favourably with the Retail PROMIS 200 centres figure of £72 psf ITZA. This indicates that Eastbourne town centre’s primary retail centre is performing relatively well in comparison to the rest of the UK, indicating it is a relatively desirable location compared with the UK average.

Based on Costar data, rents in Eastbourne Town Centre are currently c. £39.40 psf in the Primary Shopping Areas as defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4. This is significantly higher than all other Eastbourne centres assessed within this report, demonstrating the relative strength of Eastbourne’s prime retail area.

Rents within the Secondary shopping area are at c. £19.00 psf according to Costar data; this is towards the lower end of the typical rental performance of the retail centres assessed within this report, which is generally between £19.00 psf and £21.00 psf.

Retailer Representation & Demand

PROMIS analysis indicates that Eastbourne Town Centre contains 107 non-food, food and café/ restaurant multiples. Of these, there are 84 non-food multiples.

Figure 22 sets out the key multiple retailers present in the town centre as identified by PROMIS.

Figure 22 – Retail Provision: Key Stores in Eastbourne

| Retail provision - key stores (2022 Q2) | | | | |
|---|-----------------------|---------------------------|-------------|------------------------------|
| Dept/Var Stores | Key Fashion Multiples | Key Non Fashion Multiples | Food Stores | Key Café / Restaurant Stores |
| Marks & Spencer | Clarks | 3 Store | Co-Op | Bill's |
| Primark | Deichmann Shoes | Body Shop, The | Iceland | Caffe Nero |
| | Fat Face | Boots | Sainsbury's | Costa |
| | H&M | Card Factory | | Domino's Pizza |
| | Hotter Shoes | EE | | Greggs |
| | J D Sports | Ernest Jones | | Kfc |
| | Jack Wills | Flying Tiger | | McDonald's |
| | New Look | Fragrance Shop, The | | Nando's |
| | Next | Holland & Barrett | | Pizza Express |
| | Phase Eight | Hotel Chocolat | | Starbucks Coffee |
| | River Island | Lakeland Limited | | |
| | Schuh | Lush | | |
| | Shoe Zone | Mountain Warehouse | | |
| | Sportsdirect.com | O2 Phones | | |
| | Yours | Pandora | | |
| | | Perfume Shop, The | | |
| | | Poundland | | |
| | | Smiggle | | |
| | | Superdrug | | |
| | | Vodafone | | |
| | | Warren James | | |
| | | Waterstones | | |
| | | WH Smith | | |
| | | Wilko | | |

Sources: PMA, Local Data Company

Last update: 20/10/2022

Customers' Experience & Behaviour

The 2022 household survey asked questions about households' shopping habits and other experiences and behaviours. Section 5 of this report provides more information in relation to the household survey specification including the defined catchment area. The survey results are included in Appendix iii and inform our retail capacity forecasts set out in section 6 of this report.

Figure 23 – Responses to: "Where does your household visit most for shopping and services?"

Figure 23 summarises the proportion of each of the town centres in this report cited as the location respondents visit most for shopping and services, including Lewes Town Centre (highlighted yellow) for reference as the next-most visited town centre after Eastbourne Town Centre.

It should be noted that the household survey was undertaken across a wide catchment area, comprising 15 zones. Zones 8-12, broadly those that surround or include the centre of Eastbourne, are the primary catchment area for the centre, although a large proportion of respondents in zones 5 to 7 also visit the Eastbourne as their primary shopping and services centre. This indicates that whilst – as expected – the principal catchment area for this centre is those areas directly around it, it does still attract shoppers from further afield who are doing their regular shopping and services.

| Where does your household visit most for shopping and services? | |
|---|---------------|
| Centre | % Respondents |
| Eastbourne Town Centre | 27.20% |
| Green Street (Albert Parade) | 0.07% |
| Hampden Park (Brassey Avenue) | 0.87% |
| Langney Shopping Centre | 1.13% |
| Meads Street | 0.20% |
| Old Town (Crown Street) | 0.07% |
| Rodmill | 0.00% |
| Seaside (Langney Road to Springfield Road) | 0.00% |
| Seaside (Seaford Road to Channel View Road) | 0.33% |
| Sovereign Harbour Shopping Centre | 1.47% |
| St Anthony's (Beatty Road) | 0.07% |
| Lewes Town Centre | 13.00% |

Eastbourne and Lewes Town Centres were the dominant responses to the 'visit the most for shopping and services' question. The next most cited locations were Hailsham Town Centre (5.80%), Seaford Town Centre (4.87%), Bexhill-on-Sea (4.40%) and Brighton Town Centre (3.87%). These preferences principally reflect issues of proximity and convenience (i.e. easy to get to from home), although clearly the attractiveness of the respective town centre offers are an important factor in driving trips to these locations.

Aside from Lewes, the main town centres cited as being respondents' primary shopping and services location are Brighton and Bexhill-Upon-Sea. However:

- Only 3.9% of respondents chose Brighton as their primary shopping location, and c. 58% of those were located in Zones 2 and 7, which means it is very likely they are located significantly closer to Brighton than Eastbourne.
- Only 4.4% of respondents chose Bexhill-Upon-Sea, and 88% of these respondents were located within Zone 15, which is the Bexhill-Upon-Sea area.

As such, it is clear that Eastbourne has significant gravity and thus a large catchment area within the Lewes and Eastbourne district, with a limited proportion of the overall population doing their shopping outside of the area, and the vast majority of those shopping outside of Lewes and Eastbourne doing so because they live closer to these other centres than – in particular – Eastbourne or Lewes.

Shoppers frequently visited Eastbourne Town Centre multiple times a week, with 55% of respondents visiting their usual centre above "at least 2-3 times a week" or "once a week". However, these trips are typically not linked to other activities, with 59% of respondents saying they did not link this trip with another activity; the next highest activity linked to these trips was leisure at only 8% of respondents.

Figure 24 (overleaf) shows the top answers to the question of what respondents like most about Eastbourne Town Centre. The main likes relate to it having a good market (4.8%), an attractive environment (6.5%), good non-food shops (14.7%), and it is easy to get to from home (16.6%). These are all positive factors relating to the town centre we have observed on

our site visits, and whilst factors such as accessibility are difficult to influence, building upon strengths such as quality of environment and improving/ expanding the market could present opportunities to further bolster Eastbourne’s status as one of the primary shopping areas in the East Sussex region.

Figure 24 – Responses to: “What do you like most about Eastbourne Town Centre for Shopping and Services?”

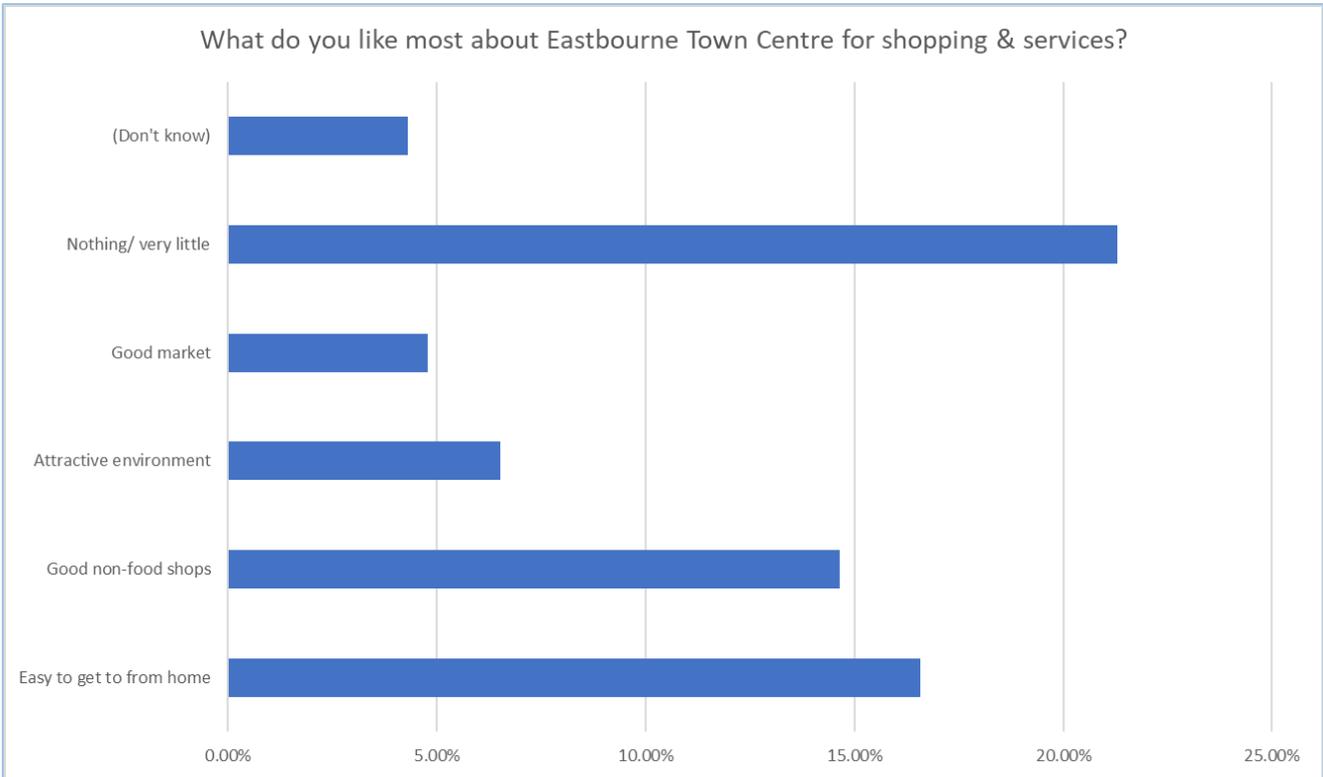
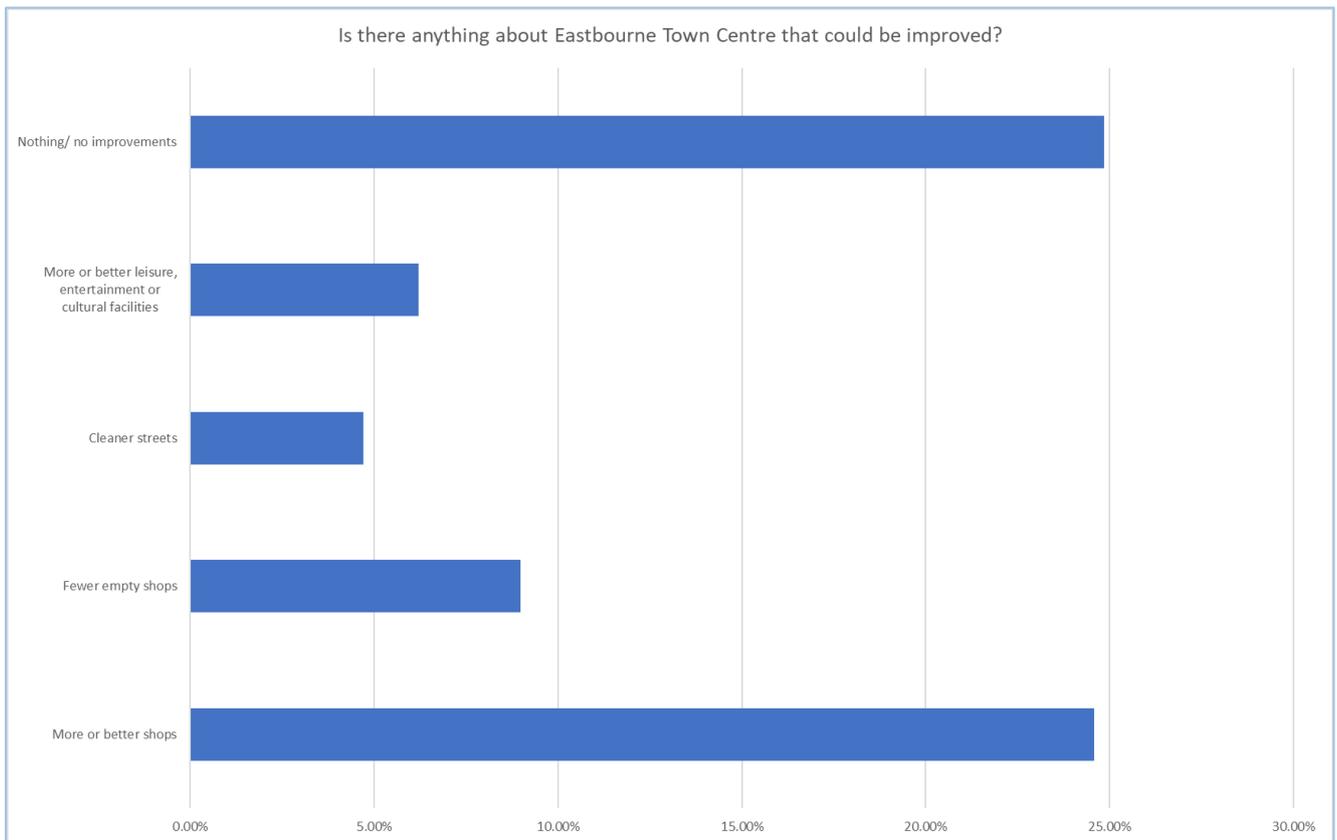


Figure 25 then identifies improvements suggested by respondents to make them visit the town centre more often. The main concerns for visitors to the town centre revolve around improvements to the retail offering, with 33.6% of respondents stating that they consider either more or better shops, or fewer empty shops, to be the main thing that needs to be improved in Eastbourne Town Centre. Beyond improvements to retail, 6.2% of respondents think improvements to the leisure, entertainment or cultural offer would draw them to the town centre more frequently, and 4.7% of respondents would be more likely to visit if the streets were cleaner.

“Nothing/ Very Little” has the highest proportion of respondents, and whilst any reason for this being the case would be speculation on our part, it would appear at first reading to indicate the principal reason for respondents using the town being out of habit, and without engaging with the town, it is notable that this response – at c. 17% for the whole dataset – is the highest single answer for all town centres in this report, followed by “Easy to get to from home” with 13.7% of responses. This is also the case for the question summarised in Figure 25 below; “Nothing/ No Improvements” (28.7%) and “More or Better Shops” (19.4%) are comfortably the two highest figures for the whole dataset. This indicates there is potentially a general indifference towards regular shopping that is either formed from habit and familiarity, and this subsequently extends to the centre that is used for those trips.

Figure 25 – Responses to: “Is there anything about Eastbourne Town Centre that could be improved?”



Of note however, is 24.9% of respondents stating that they would not change anything, suggesting that many of those users visiting the town centre on a regular basis are happy with the provision on offer as it stands.

Accessibility

Eastbourne Town Centre is accessible by car, rail, bus, walking and cycling.

There are a number of key arterial routes into Eastbourne, most notably the A22 and A27, which together provide access to the town via the A2270, A2280 and A2290 from the north, east and west of Eastbourne.

Eastbourne Railway Station is located within the very centre of the main shopping area. It has three platforms and provides regular services to Brighton, Lewes, Hastings and London. There is an extensive bus network throughout the town, with regular routes running both within the town centre itself and also out to suburban areas, and even further onwards to nearby towns such as Seaford, Newhaven, Peacehaven and Brighton (the number 12) and Bexhill on Sea and Hastings (the number 99).

In terms of car parking, the Town Centre is well served in particular by two large car parks at Eastbourne Station and the Beacon Centre. The former contains c. 340 spaces, and the latter 1,000 spaces, including 15 for electric vehicles, 35 disabled bays and 23 parent and child bays. Away from the central hub of the Town Centre, there is an NCP with 414 spaces on Trinity Place near the beach, and Devonshire Park car park with 121 spaces in close proximity to the Towner Gallery and the Theatre.

There is secure cycle parking next to the Enterprise Shopping Centre/ Railway Station car park. However, there is limited cycle infrastructure that allows safe and easy access for cyclists of varied skill levels within the town itself which may discourage less confident or younger users, for example.

The primary shopping area is either pedestrian only and covered (in the shopping centre) or is pedestrian priority with bus access only along Terminus Road, which remains in place – with the exception of a small section – to Grand Parade and the seafront. The remaining major retail thoroughfares in Eastbourne are open to cars; the Station Area in particular suffers somewhat as a result of its larger roads and increased car use, with a high level of segmentation and difficult pedestrian crossing caused by large roads, roundabouts and junctions, however it is our understanding that the proposal

for the Town Centre Public Realm Improvements Phase 2b will seek to address. The Little Chelsea area however, with its narrower – predominantly one-way – roads, is more pedestrian/ shopper friendly.

Environmental Quality

Both the interior and exterior of the Beacon Shopping Centre are predominantly well-maintained, in particular on and around the western entrance and along the southern boundary along Terminus Road. However, there are a number of vacancies that – whilst not enormously detrimental to the overall quality of the shopping centre as it stands – are definitely towards the upper end of what can realistically be maintained without harming the overall experience of using the centre. Should the vacancy rate increase much further, it may harm the overall perception of the shopping centre’s vitality, both making it less appealing to shoppers and therefore prospective tenants.

The main semi-pedestrianised area of Terminus Road, between the two Beacon Shopping Centre exits, is generally attractive, with a large, open walking area that has a number of places to sit, bins, and lighting, however the planting is not as extensive or attractive as at the more recently refurbished western end of Terminus Road. This location has relatively well maintained shops, a low level of vacancy, and footfall is generally high. Eastbourne Borough Market on Wednesdays and Sundays positively contributed to this- perception of both the quantity of visitors and the activity in the area when our site visits were undertaken.

The pedestrianisation of the western end of Terminus Road – around the entrance to the Centre – has been implemented effectively, with attractive planting and street furniture, although the shop fronts on this stretch of road are not generally maintained to quite such a high standard. However at the eastern exit, whilst the pavement is very wide it is uneven and less well maintained, and the planting and street furniture are either limited or poorly maintained. The shops at this exit are in a similar state of repair as their counterparts at the western exit, however away from the Beacon exit, there is an immediate issue from a town centre vitality perspective in the form of three very large vacant units: The former Debenhams Building, the former Blacks retail unit, and slightly off the main route the former Curzon cinema.

As Terminus Road progresses towards the Seafront, the road remains partially pedestrianised and on our visits was busy with shoppers, however the quality of the public realm – beyond the partial pedestrianisation – is still not as high as some of the recently redeveloped areas around the Beacon. The restaurants situated close to the Seafront have outdoor seating on the street, which enhances the attractiveness of this part of the road.

As highlighted above, the Station Area and surrounds suffers from larger roads funnelling traffic around the pedestrianised zones, larger junctions, roundabouts and the subsequent difficult pedestrian crossing points these factors create, particularly at the around the Prezzo/ Library junctions. Similarly, whilst access to the Enterprise Centre is of relatively poor quality due to being surrounded by car parks, the actual centre itself is set in an attractive period building, home to small, well-maintained independent shops. Directly around the station the road is still significantly wider with a relatively narrow pavement, but the streetscape is well maintained, and traffic is slowed relatively effectively by signage, traffic islands and traffic lights.

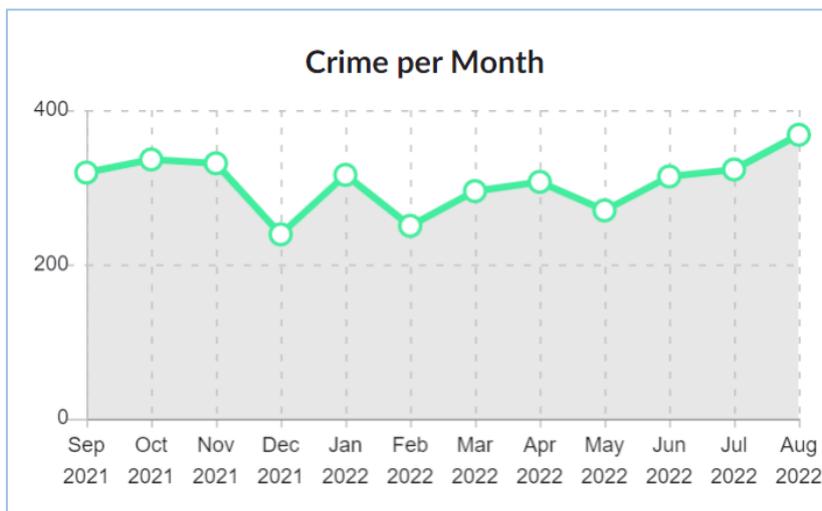
Little Chelsea is significantly quieter than the nearby Station Area and Surrounds due to its narrower roads, which restrict traffic flow. The area predominantly comprises smaller, attractive period buildings, which enhance the perception of this location. The street furniture and planting in this location is minimal, in part due to the narrow roads and pavements.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, though these were conducted during the day. Figure 26 shows the monthly crime rate for the past 12 months sourced from the East Sussex Police website.

Whilst this is significantly higher than other centres within this report – generally averaging between 200 and 400 incidents of crime per month – this is also an area with significantly higher population density both living and using this centre than elsewhere within this report, and so a higher level of crime reporting is to be expected. However, we have received anecdotal reports from the Council in their interactions with traders in the town centre that indicate street drinking and anti-social behaviour are evident both in the daytime at night, which indicates there may be more contributing to this than simply population volume.

Figure 26 – Crimes Per Month: Eastbourne Town Centre



Opening Hours & the Evening Economy

Most of Eastbourne Town Centre’s shops and other attractions are open throughout the week. The main shopping centre, the Beacon, is open from 8:00 until midnight daily, with the exception of Sunday when it opens slightly later at 9:30.

The main food store within the town centre is Sainsbury’s in the Beacon, which is open from 8:00 until 18:00 Monday – Wednesday and Saturday, 8:00 until 19:00 on Thursday and Friday, and has reduced hours on Sunday.

Eastbourne’s evening economy is relatively strong, throughout the centre there are restaurants open until between 21:00 and 23:00, numerous bars and pubs open until the late evening on both weekdays and weekends, as well as a small number of nightclubs.

Barriers to Business Investment

Eastbourne town centre has some specific barriers to new businesses opening and/ or existing businesses expanding, which are likely to include:

- Specific tenant requirements of a shopping centre (the Beacon), which frequently expect/ require tenants with strong covenants, in addition to the elevated rents generally associated with this type of retail, are both likely to serve as a deterrent to prospective small businesses in particular.
- The large size of some of the available units in the town centre (namely the two former department store buildings) will deter prospective tenants as there are very few retail businesses large enough to occupy such a large floorspace effectively, and as the capital cost of renting such large floorplates will be too much for most businesses. These will likely be “repurposed” in response to this issue; this is detailed further in the New Development & Investment Proposals subsection below.
- The appealing areas for independents, such as Little Chelsea, have lower availability (vacancy rates), potentially resulting in competition for space.
- The centre will likely continue to be vulnerable to the structural changes and challenges facing the retail and hospitality sectors, which have been accelerated by the pandemic and have resulted in key retailer closures throughout the UK.

On a macroeconomic scale, operating costs such as business rates, wages and recently significant inflation, have created further pressures on the sector that will likely restrict business investment as they struggle to overcome multiple combined cost increases.

New Development & Investment Proposals

The most recent major investment in Eastbourne Town Centre was the extension of the Beacon Centre in 2018 that saw 22 new shops, seven restaurant units, a nine screen cinema and changes to the car park added. This addition saw several important multiples, such as H&M, Schuh and Next, move to the town, although the centre as a whole has seemingly been affected by retailer failures and/ or portfolio downsizing by larger multiples, as there are a number of vacant units.

At a similar time as the extension to the Beacon was completed, Phase 1 of the pedestrianisation of the town centre was undertaken. Phase 2a of this pedestrianisation/ modernisation process was consulted upon in 2020 and approved to move forward to detailed design stage with works set to commence in January 2023, and a consultation for Phase 2b is currently underway. Funding has been partially secured for these works, with Phase 2a being funded via the LEP and the Levelling Up Fund (LUF) bid contributing towards the funding Phase 2b.

The LUF money secured has also been utilised on several other projects designed to improve the town centre and wider borough council area. Beyond the pedestrianisation project, the LUF funding has been utilised for Capital improvement works to the top floor facilities of the Towner Gallery, ahead of it hosting the 2023 Turner Prize. These investments have been analysed in further detail in Section 10 of this report.

The Aforementioned vacant TJ Hughes shopping centre was subject to a planning application in August 2022 to redevelop the site, creating 65 new flats above c. 7,600 sqft of retail space. We understand this application obtained resolution to grant subject to S106 in October 2022.

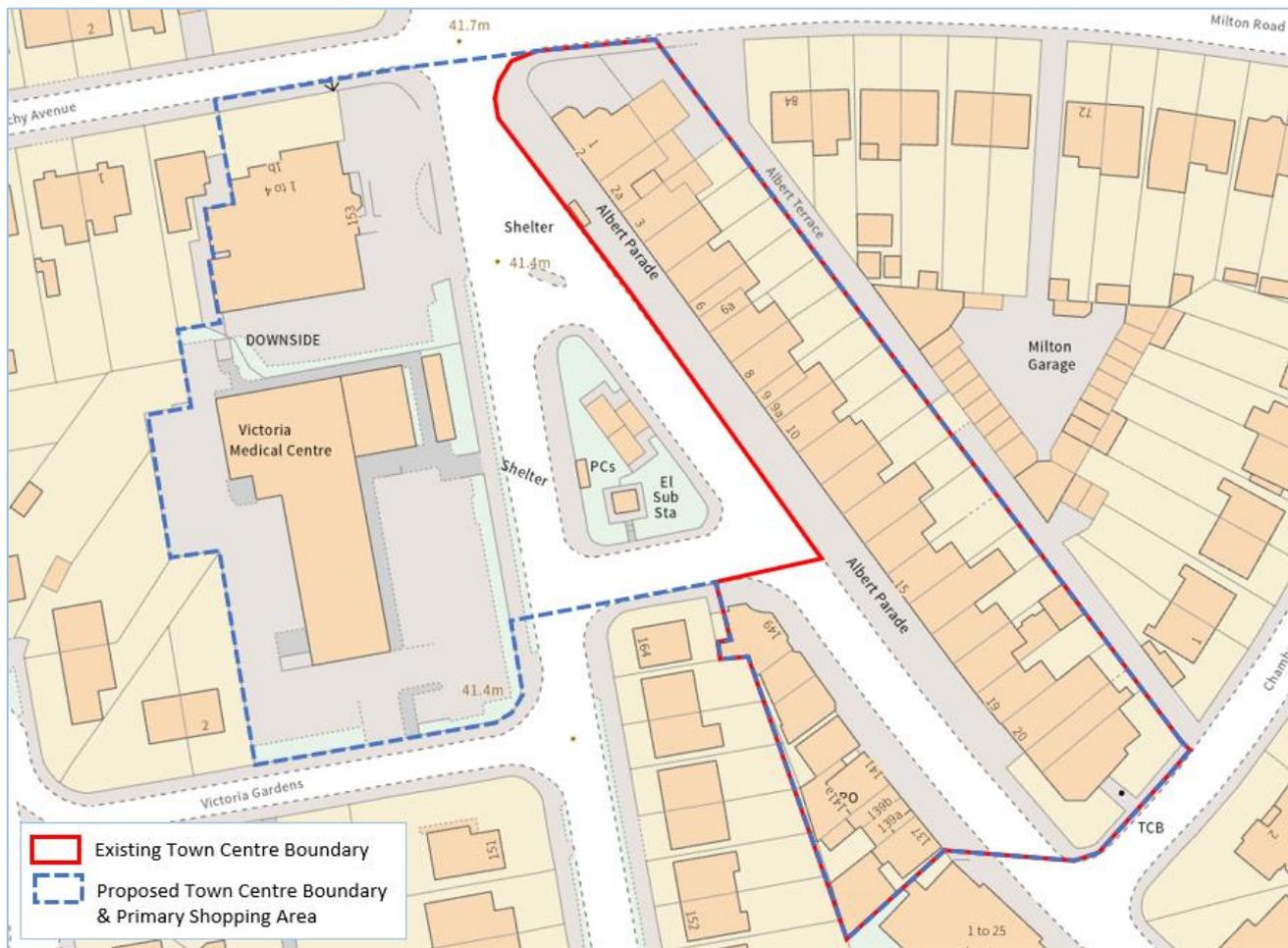
Whilst not yet subject to a planning permission, the Debenhams has been identified within the LAA as having the capacity to support 120 residential units and c. 11,000 sq ft of retail/ leisure at ground floor during the plan period

Green Street (Albert Parade)

Introduction/ Context

Green Street (Albert Parade) is approximately 1.3 miles north west of Eastbourne Town Centre, and is defined as a District Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4 due to its predominantly local retail-led function and its position as the principal service location for the surrounding area. This centre is linear, running north to south along Green Street, and ends at Chamberlain Road, where the retail provision is rapidly replaced by residential.

Figure 27 – Green Street (Albert Parade) With Annotated Proposed Changes to Boundary



Since the previous boundary was drawn, The Drive Public House – in the north western corner and outside the town centre boundary – has been replaced with a Sainsbury’s Local and Kamsons Pharmacy. Whilst these new retail units are segmented from the remainder of Albert Parade by Victoria Drive – a large and busy road – given their scale and proximity these shops now create a logical end to the town centre and should therefore be included within the boundary, as has been indicated in figure 27.

Diversity of Uses & Vacancy Levels

The assessment of the diversity of uses for this centre has been conducted solely on a per-unit basis as we do not have access to floorspace areas. However, in this example the largest single provision is the Co-op which houses three units, meaning the split should remain fairly reflective of the overall composition in this centre.

Figure 28 –Green Street (Albert Parade) Retail Composition (C&W Site Visit data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 7 | 23% |
| Convenience | 10 | 33% |
| Retail Services | 7 | 23% |
| Leisure | 4 | 13% |
| Financial & Business Services | 2 | 7% |
| Vacant | 0 | 0% |

As demonstrated in figure 28, this centre comprises a larger proportion of convenience goods than Eastbourne Town Centre, which is symptomatic of its position as a smaller centre that people are less likely to travel to for comparison goods. These convenience stores comprise the three Co-op units and Sainsbury’s store, alongside several smaller units including two newsagents and bakeries, and one butcher and greengrocer.

The joint second largest proportion of uses within the centre is comparison and retail services at seven units each. The majority of the former comprise either household furnishing or charity shops, and the latter

predominantly comprises health & beauty services, with an optician and laundrette making up the remainder of the services.

As such the centre is relatively balanced in terms of its diversity of uses, and this alongside the lack of vacancies suggests a centre that is very healthy and serves its local population well.

As highlighted above, there are currently no vacancies in this centre – there have been no extended vacancies in this centre in at least the last ten years, with any vacated units quickly re-let to new tenants.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents in the Green Street (Albert Parade) centre are currently assessed at c. £20.35 psf. This is a strong rental figure compared with many of the centres assessed within this document, and demonstrates the relative health of the centre; its low vacancy rates, good mix of retailers and strong footfall combining to keep rents high.

Retailer Representation & Demand

PROMIS analysis does not cover this specific town centre, and as such we have conducted our own analysis of the centre, which has been set out in figure 29.

Figure 29 – Retail Provision: Green Street (Albert Parade)

| Retail Provision - Site Visit September 2022 | | | |
|--|------------------------------------|-------------------------------|-----------------------------|
| Key Fashion Multiples | Key Non-Fashion Multiples | Food Stores | Key Café/ Restaurant Stores |
| None | Porcelanosa Totally Wicked Vape | Sainsbury's Local Co-op | None |

This analysis indicates the principal multiples present in this centre are the two national retailers, Sainsbury’s Local and Co-op. Beyond this, there are no fashion or café/ restaurant multiples, and two small non-fashion multiples. The majority of this town centre comprises independent businesses.

Customers' Experience & Behaviour

The 2022 household survey asked questions about where respondents shop. The survey results are included in Appendix iii, and section 6 of this report.

Very few respondents consider Green Street to being a primary centre to visit for their shopping and services. Five respondents (0.3%) said they do most of their food and grocery shopping at the Sainsbury's Local in this centre. For context, the highest number of respondents citing an individual store in Eastbourne as their primary location for this type of shopping was the Tesco Extra in Admiral Retail Park, with 83 respondents (5.53%), and internet delivery was the highest of all at 204 respondents (13.6%). Nine respondents (0.6%) said they used the Co-op within this centre as their primary location for small scale top up food and convenience items, and a further five (0.3%) use the Sainsbury's for this purpose. These figures demonstrate that Green Street is a centre that is frequented by local people, and is not typically considered to be a convenience retail destination.

Accessibility

This centre is focused on serving the local population in a predominantly residential location, with visitors likely travelling to the centre on foot. However given its relative size compared with other nearby centres, the area likely has a draw beyond simple walking distance, and we would expect people to drive or get the bus to this centre in addition to walking. Whilst the household survey sample size is very small, this is borne out in the responses to the question "how does your household normally travel to [this centre]?", with both of the two respondents to this question in relation to Green Street stating they drive to this centre.

Whilst parking is mostly limited to on-street, there is a small customer-only car park at the Sainsbury's, and there are several bus stops at both the northern and southern end of the parade, served by the 1, 1A, 4, 51 and loop buses.

Environmental Quality

The environmental quality of Green Street Albert Parade is generally good. The street is tree-lined, clean, and has a small park and public toilet at its northern end. The street comprises predominantly attractive red brick buildings with generally well-maintained shop fronts, and pavements are wide enough to support footfall commensurate for this location whilst also providing a good buffer to the – relatively low – road traffic. This latter point is such that a number of people were sat on chairs and tables outside the café on the corner of Albert Parade and Green Street at the time of our visit.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 30 shows the monthly crime rate for the past 12 months for the Motcombe area – which includes this centre – sourced from the East Sussex Police website. Monthly crimes peak at c. 40 reports per month, with the average rate generally some way below that figure; this is generally lower than the centres assessed within this report, and thus verifies our perception of the area as being one that is safe.

Figure 30 – Monthly Crime Rate: Motcombe



Opening Hours & the Evening Economy

Most of this centre's shops and services are open throughout the week.

The Co-op and Sainsbury's typically open for trading at 7:00 and stay open until 22:00 every day of the week, including Sundays. The majority of the remaining retail units generally operate between 9:00 and 17:00, and the leisure uses vary depending on whether they are cafes (8:30 until mid-afternoon) or restaurants (lunch services from 11:30 until 14:30 and then 16:30 until 21:00).

The night time economy comprises the three take away/ restaurants within the centre, as well as the two supermarkets, which somewhat limits the activity beyond typical shop opening hours, but is relatively aligned in its provision with the general feel both of the centre and the wider – predominantly residential – area.

Barriers to Business Investment

On our site visit, we noted that Green Street has some potential barriers to new businesses opening and/ or existing businesses expanding, which are likely to include:

- A lack of vacancies and turnover of businesses limits opportunities for new businesses to move to the area.
- Two large businesses (Sainsbury's and Co-op) in the area create a risk of new businesses being out-competed.
- Local focus to retail potentially creates a ceiling to the expansion of centre users, unless additional residential brings new people to the area.

New Development & Investment Proposals

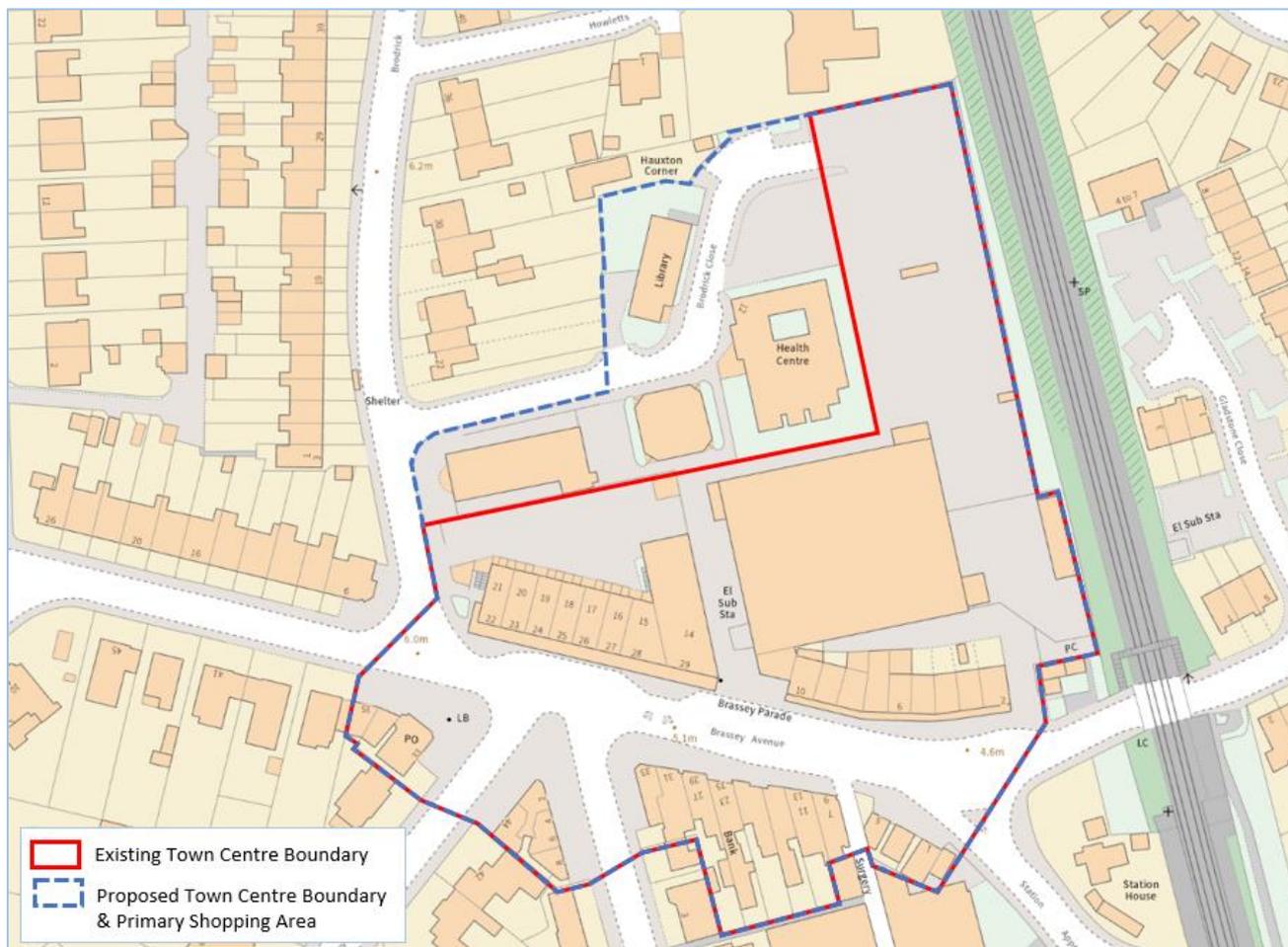
The most recent development of note in this centre is the change of use from The Drive Public House to the Sainsbury's Local during the early-mid 2010s.

Hampden Park (Brassey Avenue)

Introduction/ Context

Hampden Park (Brassey Avenue) is situated approximately 2.0 miles north of Eastbourne Town Centre. As with Green Street, this centre is defined as a District Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4. This centre is set around Brassey Avenue, has retail provision on either side of the road and is concentrated around a large Tesco Superstore which dominates much of the northern boundary. The full boundary has been provided below.

Figure 31 – Hampden Park (Brassey Avenue)



This centre is bound to the east by a railway line, and beyond the railway there is continuing sporadic retail provision. Beyond this, to the south east, there is the very large Hampden Retail Park, which houses a number of national retailers including Halfords, B&Q and Dreams Bed Store, in addition to being surrounded by several other large supermarkets including a Morrison's and Aldi. We have proposed a single change to the town centre boundary to include Hampden Park Community Hall and Health Centre; this change is depicted in Figure 31.

Diversity of Uses & Vacancy Rates

The assessment of the diversity of uses for this centre – as summarised in figure 31 – has been conducted solely on a per-unit basis as we do not have access to floorspace areas. In this example the largest single provision is the Tesco Superstore which counts as one unit in spite of its significant size relative to the other units within the town centre.

Figure 32 –Hampden Park (Brassey Avenue) Composition (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 9 | 26% |
| Convenience | 3 | 9% |
| Retail Services | 9 | 26% |
| Leisure | 9 | 26% |
| Financial & Business Services | 2 | 6% |
| Vacant | 2 | 6% |

This means the split as summarised within the table will not be entirely reflective of the overall composition in this centre, and it should therefore be noted that in terms of the overall provision there is a significant amount of convenience floorspace that is in effect not accounted for within this analysis.

This table demonstrates a relatively even split between uses, although again this would be skewed significantly towards convenience on a floor area basis. However, the variance within these use categories is fairly low, which detracts from the vibrancy of the town centre – for example the comparison uses comprise second hand shops, charity shops, and gift shops which do not generally typify a healthy town centre. A further example, the majority (seven of nine) of the retail services within this centre fall into the health and beauty category and are either nail salons or hairdressers, with the remaining two retail services being a post office and a funeral directors.

Of note, there are several leisure units – most of which are fast food and/ or takeaway uses – but there is also a swimming pool and a café, the latter had a number of people both in and outside at the time of our visit.

Whilst only two of the units (6%) are listed as vacant, a further six were shuttered on our visit which again further lowers the vibrancy of the centre.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents in the Hampden Park (Brassey Avenue) centre are currently assessed at c. £19.60 psf. This is relatively strong given the perceived low quality of the high street, likely due to the presence of a large Tesco, the Railway station, and the low vacancy rate of the centre.

Retailer Representation & Demand

There are very few multiples present within this centre, with three of the 34 retail units (9%) identified on our site visit classified as multiples. Those multiples are as follows:

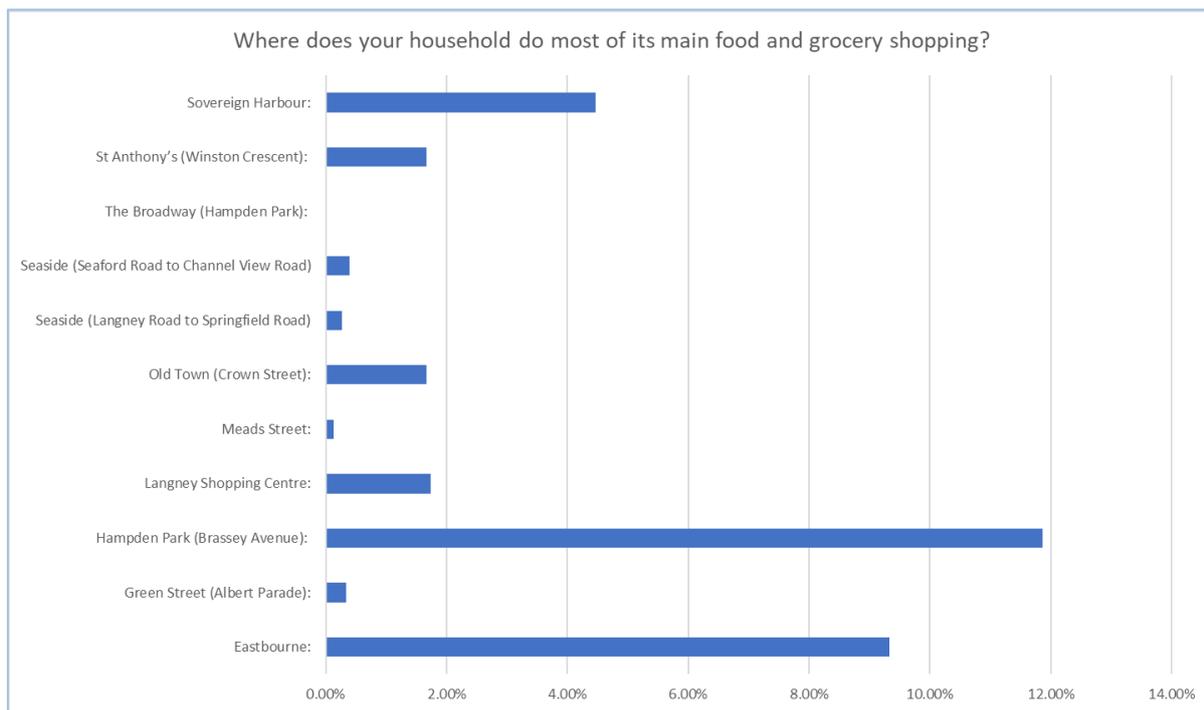
- Tesco
- Post Office
- Ladbrokes

The remainder of the businesses are either independents, or charity shops.

Customers’ Experience & Behaviour

The household survey asked where households within the study area visit most frequently for food and grocery shopping, and figure 33 summarises the answers to this question. It is important to note that – in the case of Hampden Park (Brassey Avenue) – this includes several shops on the outskirts of the centre, such as the Aldi and Morrisons on Lottbridge Drive to the east as well as Sainsbury’s at Broadwater Way Retail Park.

Figure 33 – Responses to: “Where does your household do most of its main food and grocery shopping?”



It is of particular note that the Hampden Park area (including the ‘non-central’ Aldi, Morrisons and Sainsbury’s foodstores) is the most popular location for primary food and grocery shopping in the Eastbourne area, although only a 1.3% catchment area market share is attributable directly to the Tesco within the centre (compared to Aldi 2.4%, Morrisons 2.8% and the Sainsbury’s at Broadwater Way Retail Park 5.3%). Tesco’s sphere of influence, as the centre’s main foodstore, is therefore limited by the ‘non-central’ foodstores in the area.

In answer to the question regarding whether shopping trips to the centre are linked with other activities, over 55% of respondents said they did not link that trip with other uses and a further 13.3% answered that they “do not know or it varies”. The next most frequent linked journey is work at 8.7% of respondents, with the combined “yes” answers that involve spending time in the centre – such as non food shopping or coffee/ café – totals 8.5% across 15 different potential activities.

Accessibility

Accessibility to this centre is very good given the presence of a rail station directly alongside the south eastern boundary. However, given the rail line serves Eastbourne town centre and the wider Eastbourne area, and given the very large retail provision within and around Hampden Retail Park, it is unlikely that rail is being used to access this town centre specifically when so many other, larger centres are readily accessible and provide a much larger retail offer.

There is one bus route – the Loop – that stops directly in this centre, and another bus stop c. 0.2 miles north east of the centre that is served by the 3A, 5, and 5A buses in addition to the Loop bus that stops in the centre.

Car access is from Brassey Avenue, however car parking within the centre itself is relatively limited; there is a small amount of on street parking on Brassey Avenue, and a large, dedicated customer car park at Tesco. Outside of the centre there are some residential streets with further on street parking.

Environmental Quality

The environmental quality of this centre is relatively low, in a large part due to the railway level crossing on the eastern boundary. On our visits to this centre, Brassey Avenue was always well-used by cars, and when the level crossing barriers were restricting traffic flow, cars built up some distance on both sides of the crossing and therefore were idling outside the main shopping area.

Beyond the traffic, the streetscape itself is also relatively poor quality; the pavement is relatively poorly maintained and comprises a patchwork of repairs; the shops are generally relatively poorly maintained low-rise 1960s buildings; there is very little planting, and there is very little street furniture beyond street lights and bollards. Furthermore, access to the Tesco from Brassey Avenue is via an alleyway surrounded by dead frontages and bin stores.

Perception of Safety

We have examined the crime statistics for this centre, which we are summarised in figure 34.

Figure 34 – Monthly Crime Rate: Motcombe



As at our visit, the area was perceived as being relatively safe – there were lots of young people around leaving school, most of whom were using the railway station alongside other members of the public. Our perception of the safety of this centre is reflected in the statistics above.

One principal issue with this centre however regarding perception of safety is the areas around the Tesco Superstore; this shop’s entrance from Brassey Avenue is effectively a long alleyway with blank frontages on both sides, as well as several bin stores.

Additionally, as the car park and main entrance at the rear of the store, they are less able to be monitored by members of the public using the high street; these factors combined do undermine the perception of the safety in certain parts of the centre.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are open throughout the week during regular opening hours.

The Tesco typically opens for trading at 6:00 until 23:00 with the exception of Sundays when limited hours of 10:00 until 16:00 are in place. The night time economy beyond the Tesco is limited to the five takeaways, all of which are open beyond 22:00, but which are unlikely to generate much in the way of footfall outside of typical shop opening hours.

Barriers to Business Investment

Beyond the aforementioned issues around environmental quality and general lack of vitality of this centre, the main issue is that the area is dominated by the presence and therefore gravity of several very large shops and a retail park nearby pulling prospective customers away from this centre.

New Development & Investment Proposals

There has been a sole development of scale in this centre in the last decade – namely application ref 180913 for the refurbishment and extension of 14-29 Brassey Parade, which saw the construction of an additional storey plus re-modelling of existing building to provide 22 additional residential units plus the retention of 7 existing flats. We understand this work was completed during 2022.

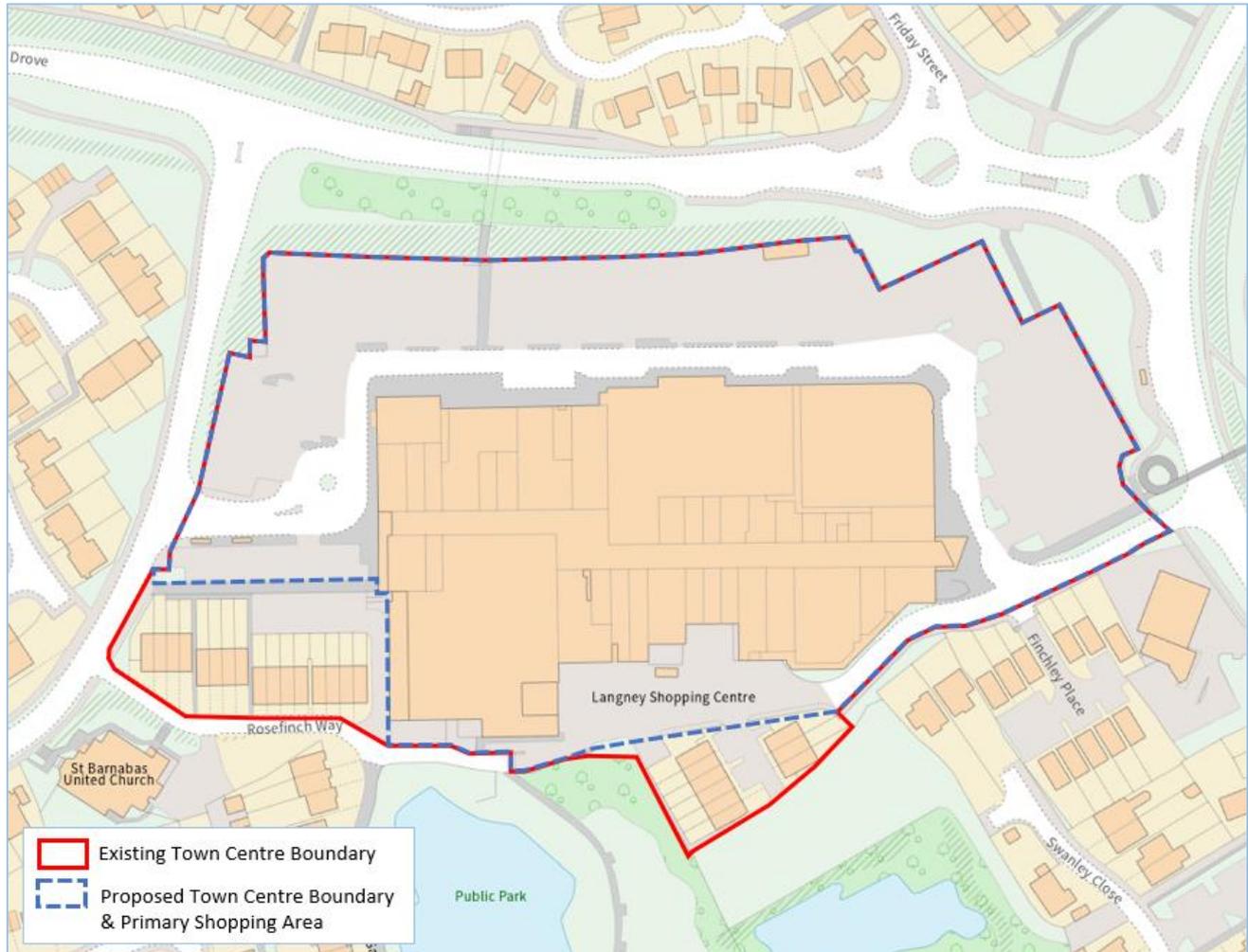
The surrounding area – in particular to the east of the railway lines – has seen a single redevelopment in that time that is of consequence to this centre, namely the large Aldi store that was completed in 2016.

Langney Shopping Centre

Introduction/ Context

Langney Shopping Centre is approximately 2.5 miles north east of Eastbourne Town Centre, and is defined as a District Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4. This centre entirely comprises the shopping centre and surrounding car parks, as depicted in the map and boundary of the centre below, and contains 46 units across c. 380,000 sq ft.

Figure 35 – Langney Shopping Centre



This centre is situated within a predominantly suburban residential location that contains a large proportion of detached and semidetached housing. It is bound to the north and east by Willingdon Drove (B2191) and Langney Rise (B2104) respectively.

Diversity of Uses & Vacancy Rates

The diversity assessment of this centre, as summarised in figure 36, has been conducted using GOAD data and verified with site visits.

Figure 36 –Langney Shopping Centre Retail Composition (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 15 | 33% | 48,200 | 41% |
| Convenience | 5 | 11% | 29,800 | 25% |
| Retail Services | 5 | 11% | 2,900 | 2% |
| Leisure | 9 | 20% | 18,900 | 16% |
| Financial & Business Services | 0 | 0% | 0 | 0% |
| Vacant | 12 | 26% | 18,600 | 16% |

One of the main notable features of this centre is the high vacancy rate on a per-unit basis, as over a quarter of all units are vacant. Whilst the floor area vacancy rate is significantly lower, it is the high number of vacant units that creates an impression of a lack of vitality as they are visible throughout the centre, as well as along the outside of the shopping centre building as it is approached from the car park. Additionally, there are several tenanted spaces that have almost completely blank frontages which creates the impression when walking through the centre of a higher level of vacancy within the centre than in fact there is.

The largest proportion of units and floorspace falls within the comparison use category which is normal in a dedicated shopping centre, and this space is anchored by several large comparison units, notably the Pep & Co/ Poundland store (17,400 sqft combined), Home Bargains (11,500 sq ft) and Sussex Furnishers (5,400 sq ft). Further anchoring is provided by two large convenience uses in a Tesco (24,100 sqft) and Iceland (4,300 sq ft).

There is a relatively large and varied proportion of leisure uses within the centre, including a large (5,300 sq ft) gym, several cafes/ fast food/ restaurants, a pub, and some betting shops. Additionally, whilst not captured within the table, there is also a Community Library within the centre, although this service was not open during our visit, we understand it is open for three hours daily excluding Sunday, Monday and Friday. This level and type of leisure provision is unlikely to be enough to generate extended stays within the centre.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents in the Langney Shopping Centre are currently assessed at c. £12.30 psf. This is among the lowest rents of the Eastbourne centres, in part – alongside the high vacancy rates – verifying our perception of the shopping centre as lacking vitality, and indicating a lack of willingness on behalf of tenants to move to the centre.

Retailer Representation & Demand

PROMIS analysis does not cover this specific town centre, and as such we have conducted our own analysis of the centre, which has been set out in figure 37 below.

Figure 37 –Langney Shopping Centre Retail Provision

| Retail Provision - Site Visit September 2022 | | | | |
|--|--|------------------|-----------------------------|--|
| Key Fashion Multiples | Key Non-Fashion Multiples | Food Stores | Key Café/ Restaurant Stores | Other Multiples |
| None | Home Bargains Boots Pharmacy Card Factory Poundland | Iceland Tesco | Costa Coffee Domino's | Snap Fitness Experience it Now MG Motors Showroom Betfred Ladbrokes |

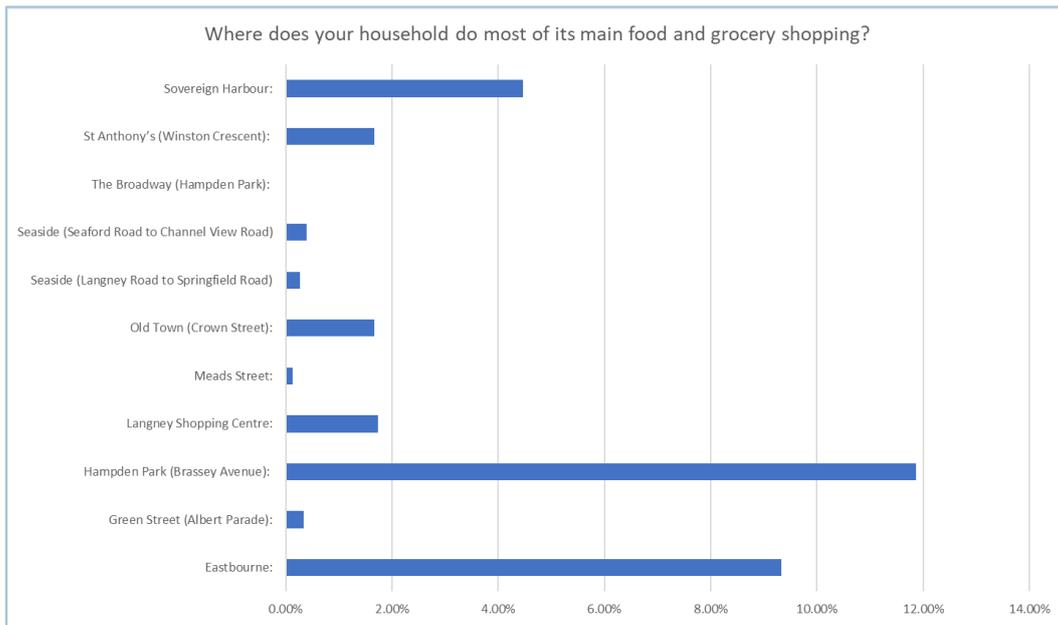
There are a number of multiple retailers present in this centre. However, aligning with our general analysis of this centre as being relatively low-quality/ lacking vitality, several of these are either supermarkets, budget retailers such as home bargains and boots, or betting shops.

Customers' Experience & Behaviour

The household survey asked where households within the study area visit most frequently for main food and grocery shopping, and figure 38 summarises the answers to this question by Eastbourne town centre area. Langney Shopping Centre secures approximately the same catchment area market share as St Anthony's (Winston Crescent) and Old Town (Crown Street), and relative to its provision – there are two supermarkets within this centre – and its status as a District Shopping Centre this is quite low.

St Anthony's (Winston Crescent) is a neighbourhood shopping centre with one supermarket, and Old Town (Crown Street) is a similarly defined District Shopping Centre albeit with a single supermarket. Furthermore, this is significantly behind similarly sized Sovereign Harbour and Hampden Park (Brassey Avenue).

Figure 38 – Responses to: "Where does your household do most of its main food and grocery shopping?"



Accessibility

This centre has a large amount of dedicated parking on site in addition to a number of main roads surrounding the site which, combined with the low density of buildings in the surrounding area, indicate the principal method of access to this centre is via car. These main roads also create significant segmentation when the site is accessed on foot – whilst there are bridges to access the site this makes access relatively difficult and unpleasant.

The centre is served by a number of bus routes, including routes into Eastbourne Centre and away from Eastbourne into the Borough Council area. The centre's nearest train station is Hampden Park, which is accessible via the Loop bus, although given the presence of a large retail park near that station it is unlikely the bus route is being used specifically for access to this centre.

Environmental Quality

The environmental quality of this centre is fair. Both the exterior and interior of the shopping centre are relatively well maintained, although as highlighted above the shop fronts inside the centre – even where tenanted – are frequently plain grey glass that makes the centre look less vibrant and well-occupied than it really is. Furthermore, whilst the amount of parking is likely required in this location, it surrounds the centre on all sides meaning there are no attractive approaches to the centre on foot. Beyond the car parks, the centre is also surrounded by several major roads which further segment the centre from its surroundings.

Perception of Safety

Figure 39 shows the monthly crime rate for the past 12 months for the West Langney area – which includes this centre – sourced from the East Sussex Police website.

Figure 39 – Monthly Crime Rate: West Langney



We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre. This is verified by the monthly crime rates, which are not elevated above typical rates seen in other centres being analysed within this report.

Opening Hours & the Evening Economy

Langney Shopping Centre’s opening hours are 8:00 to 20:00 daily, with limited hours on Sundays of 10:00 to 16:00. The majority of the retail uses keep the same hours as this, however some stores such as Tesco and Iceland open either longer or shorter hours respectively.

The only true contributor to the evening economy in this centre is the Kingfisher Tavern, which is open from 11:00 until beyond midnight every night.

Barriers to Business Investment

The centre has a relatively local feel; it is not a very big shopping centre compared to some of the others assessed within this report, and it is predominantly surrounded by suburban housing – this will limit the types of businesses that will be able to set up here. Furthermore, there is an apparent reliance on cars to access the centre, which combined with the limited opening hours of the centre itself will likely further limit the types of businesses – in particular this will almost totally restrict the ability of businesses in the night time economy to establish themselves in this location.

On the other hand there are several available units due to the high level of vacancies in the centre, and the units that are available are generally small, thus reducing the rental burden on any new businesses.

New Development & Investment Proposals

A large extension to Langney Shopping Centre was completed in 2019 that increased the floor area of the centre by approximately 43,000 sqft. Beyond this application, there has been no other commercial development in close proximity to the centre in the past 10 years.

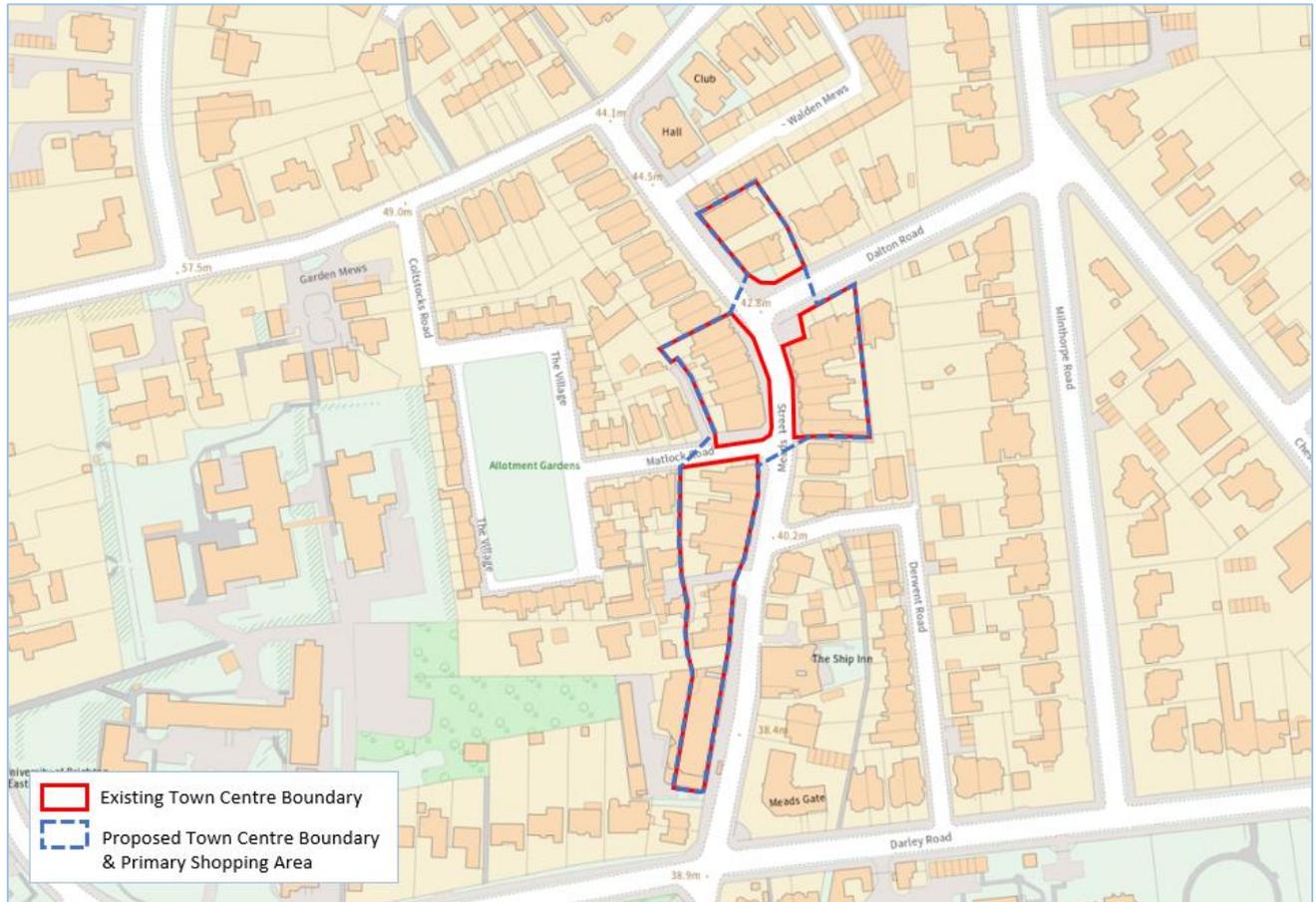
However, there have been several planning applications for residential development on the edges of the District Centre, amounting to the development of approximately 87 new homes being granted planning permission.

Meads Street

Introduction/ Context

Meads Street centre is situated approximately 1.1 miles south west of Eastbourne Town Centre in Meads, on the south western edge of the Eastbourne urban area.

Figure 40 – Meads Street



The Meads area outside central Eastbourne is suburban, generally comprises large detached and semi-detached houses and is home to several educational institutions, most notably the Eastbourne Campus of the University of Brighton and St Andrews Preparatory School.

The centre itself runs north to south along Meads Street, and comprises 31 ground floor retail uses. The centre is defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4 as a District Shopping Centre.

Diversity of Uses & Vacancy Levels

The assessment of the diversity of uses for this centre – as summarised in the table below has been conducted solely on a per-unit basis as we do not have access to floorspace areas for these units.

Figure 41 –Meads Street Retail Composition (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 5 | 17% |
| Convenience | 8 | 28% |
| Retail Services | 4 | 14% |
| Leisure | 5 | 17% |
| Financial & Business Services | 5 | 17% |
| Vacant | 2 | 7% |

The majority of retail units are on the same principal retail thoroughfare, and are therefore of similar size. The exception is the Tesco Express on the southern end of Meads Street, however as this comprises – and has been counted as – five shop units combined into one large floorplate this counting will remain representative of the overall composition of the centre.

The Meads Street centre is diverse for its size, predominantly comprising small retail units, leaning towards smaller or independent businesses. There is an even split of:

- Comparison: A varied mix, including electrical goods, pharmacy, cycle shop, florist and charity shop.
- Convenience: Mostly attributable to the Tesco Express, plus two independent delicatessens and an independent off-license.
- Leisure: Comprising three independent cafes, one restaurant and a pub.
- Retail Services: three hair salons/ beauticians and a dry cleaners.
- Financial & Business Services: Solicitors and a number of estate agents.

This diversity is symptomatic of a healthy retail environment, and whilst there are some vacancies, the level is low relative to other town centres within Eastbourne and the UK as a whole at two units or 7%.

Commercial Rents

Coupled with the other town centre performance metrics, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Meads Street are at c. £19.95 psf. This is in close proximity to the strongest rents within this study away from Eastbourne Town Centre itself, indicating this is a healthy centre which is desirable to retailers and likely has a strong catchment area for the amount of retail available.

Retailer Representation & Demand

The majority of the retailers in this centre are independent, and those that are multiples are generally smaller multiples. The exception to this is of course the large Tesco Express at the southern end of the centre’s boundary.

Customers’ Experience & Behaviour

The household survey question “where does your household visit most for shopping and services?” saw only 3% of respondents name Meads Street as their most frequent destination. All of these respondents were within ‘Zone 9’, which is the Meads area, thus indicating – albeit across a limited sample size – that this centre is very local and not perceived to be a destination for shopping by the majority of Eastbourne’s population.

Accessibility

Accessibility to this centre is relatively low; it is quite far from Eastbourne Town Centre at 1.1 miles, and parking is restricted to on-street. The 3 and 4 buses run directly onto Meads Street from Hampden Park through Eastbourne town centre and Old Town on to the wider Meads area respectively.

The centre serves a relatively large local area with little competition from other centres, and this area includes residential, university and school users in addition to being the closest centre to the famous tourist destination Beachy Head. This catchment is likely restricted by parking capacity and walking distance from the centre.

Environmental Quality

Meads Street is an attractive, historic shopping street with shops that are predominantly well-maintained. The main retail street is a relatively narrow thoroughfare, and when undertaking our site visit was quiet with minimal traffic. However, the pavement is also relatively narrow with minimal street furniture, making walking between shops challenging and minimising opportunities to stop in the centre. Planting in the area is minimal, which is a slight negative against the overall perception of the area’s attractiveness.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 42 – Monthly Crime Rate: Meads



Figure 42 shows the monthly crime rate for the past 12 months for the Meads area – which includes this centre – sourced from the East Sussex Police website. This is among the lowest monthly reporting of crime in this report, which aligns with our perception of the centre on our visit as being very safe.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are open throughout the week during regular opening hours.

The Tesco Express is open from 7:00 until 23:00 every day of the week, and the Ship Inn – the only pub in the centre – is open from 10:00 until 23:00 every day except Sundays, when it closes at 22:30.

Beyond these two businesses, there is a limited number of shops/ leisure contributing to the evening economy; Xing Fu Chinese restaurant is open until 23:00 every day except Monday, and Ancient Grains café, which generally operates during the day but opens in the evening – until 21:30 – on Friday and Saturdays.

Barriers to Business Investment

We are not aware of any barriers to new businesses that are specific to this centre.

We did note on our site visit however that this is a small centre that already has a large Tesco. As such, there is a risk that this shop will outcompete any other similar businesses that seek to establish themselves in this location; this can be exemplified by the now vacant Co-op which would have provided a similar service but closed in February 2022 and has yet to be replaced, although we understand there are plans to re-open the store as a “Co-op Welcome Store” in December, which will also include the re-provision of the Post Office that was previously located within the Co-op.

New Development & Investment Proposals

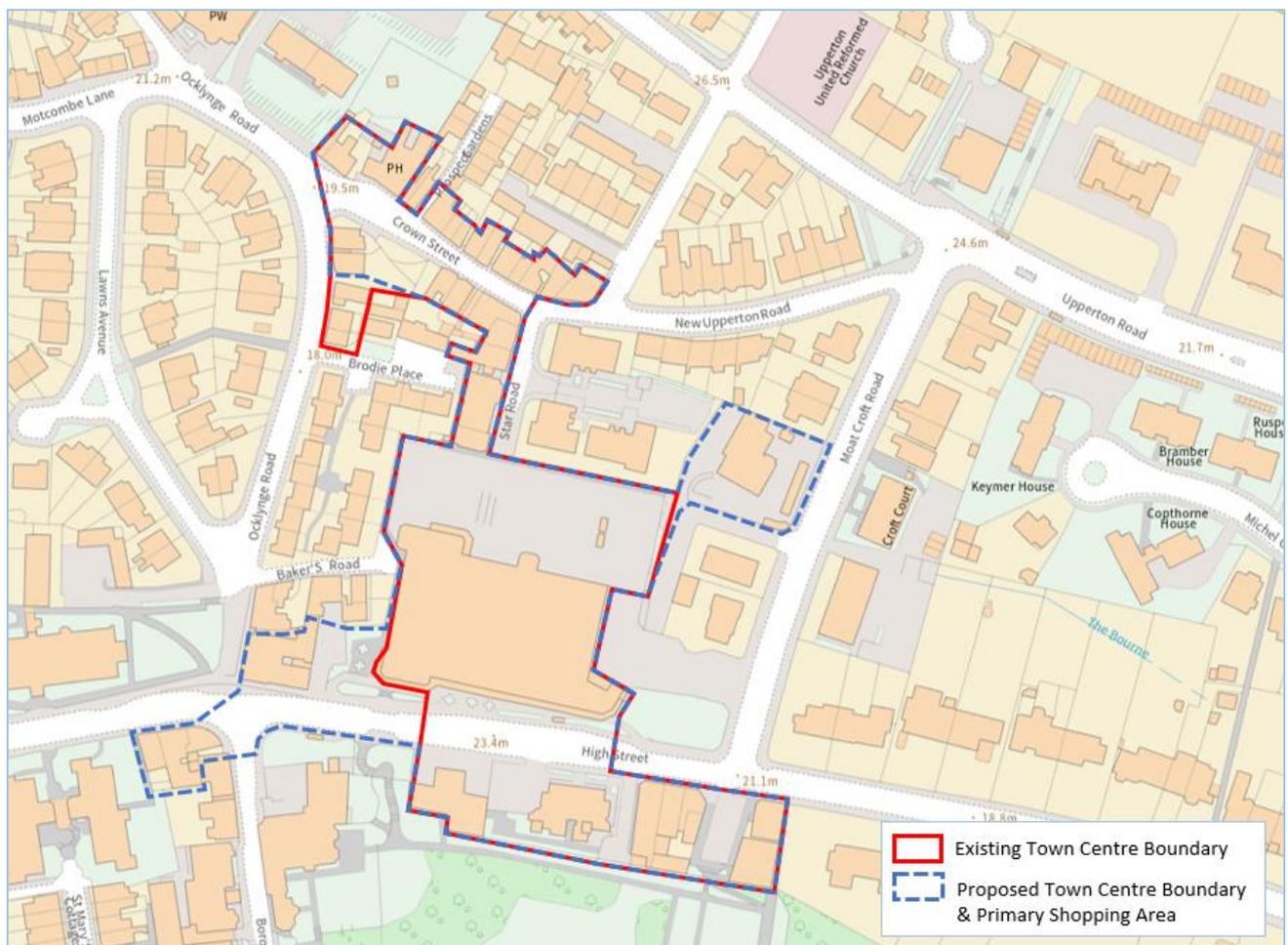
There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment in the near future.

Old Town (Crown Street)

Introduction/ Context

Old Town (Crown Street) is defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4 as a District Shopping Centre, and is located approximately 0.6 miles north west of Eastbourne Town Centre. The centre is dominated by a large Waitrose supermarket, which comprises the vast majority of the southern portion of the centre's boundary area. To the north, there is a small additional retail area focused around Crown Street, and across these two areas there are a total of 27 retail units.

Figure 43 – Old Town (Crown Street)



As demonstrated by Figure 43, we have proposed changes to this town centre boundary.

Diversity of Uses & Vacancy Levels

This centre is very small, with one major retailer taking up the vast majority of the available space in one large purpose-built unit. The remaining retail units are very small, and are therefore almost entirely let to independent businesses.

Evidently the proportion of space dedicated to convenience retail would be significantly higher on a floor area basis, however as this information is not available for this centre the analysis has taken place on a per unit basis.

Figure 44 –Old Town (Crown Street) Retail Composition (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 4 | 15% |
| Convenience | 2 | 8% |
| Retail Services | 7 | 27% |
| Leisure | 7 | 27% |
| Financial & Business Services | 3 | 12% |
| Vacant | 3 | 12% |

The level of diversity in this centre is low. The comparison provision comprises two antiques shops and two furniture shops, the retail services almost entirely comprise health & beauty uses with a filling station and post office, and the composition of the leisure provision in the centre is a mix of pubs, restaurants and cafes. The only financial & business services provision is estate agents.

Two units are vacant, however one of these appeared to be in the process of being either refurbished or refitted for a new tenant on the day of our site visit.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, in the Old Town (Crown Street) centre are currently assessed at c. £19.30 psf. This, although this comes with the caveat that the vast majority of the centre is taken up by the Waitrose, which likely skews the rental values upwards. A further consideration that likely influences the rents in this location is its relative proximity to Eastbourne Town Centre in comparison with other centres assessed in this report.

Retailer Representation & Demand

The majority of this centre is concentrated around a single major food retailer in Waitrose, as well as its accompanying car park. The remaining units within this centre are almost solely small independent businesses.

Customers' Experience & Behaviour

The household survey question “Where does your household do most of its main food and grocery shopping?” saw 25 people, or 1.7% of all respondents, say their principal shopping is undertaken at Waitrose in this centre. A further 16 or 1.1% of all respondents cite this supermarket as being where they do most of their shopping for top up food and convenience goods items.

This centre is – the Waitrose aside – quite small. This is reflected in the answers to questions that do not include groceries; there was only one respondent to “Where does your household visit the most for shopping and services?” citing Old Town (Crown Street), suggesting that the primary reason users do when visiting this centre is purchasing groceries.

Accessibility

Accessibility to this centre is reasonably good. It is a short (0.8 miles) walk from Eastbourne Town Centre, and is situated close to a main road in the A2270 that provides car access to the north of the Eastbourne borough council area, and the A259 that provides access to Eastbourne Town Centre and west into the South Downs National Park and onwards to Seaford, Peacehaven and Brighton. There is a large customer only car park serving the Waitrose, and if visiting the remainder of the centre by car, there is a small amount of on-street parking on the residential streets on the outskirts of the centre.

There are a number of buses serving the centre, including the 54 and 98, both of which run from the town centre out to the northern edges of Eastbourne, such as Polegate and Hailsham. Further buses serving this centre include the 1, 5 and 12.

Environmental Quality

In spite of the small size of this centre, there are two very different areas, each with their own distinct feel. The southern area around the High Street is compromised somewhat by the High Street, which on our visit was busy with fast moving traffic. Whilst there are a number of attractive historic buildings near the High Street (St Mary the Virgin Church, the Lamb pub and a listed 16th-century home frequented by Charles Dickens), these all sit on the outside of the town centre boundary in the south west, and so this section is dominated by the busy road and the unattractive, predominantly blank frontage of the Waitrose on the northern pavement, and a petrol station forecourt on the opposite side of the road.

The northern portion of the centre is generally more attractive and comprises a network of narrow roads, independent businesses and period shopfronts. Whilst traffic is permitted along these narrow streets and the pavements are narrow, traffic is low and slow, making it easy to cross in spite of the lack of formal crossing opportunities. Although the quality of the environment in this portion of the centre is generally high, there is a lack of planting and there are few places to linger within the centre when not shopping.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 45 – Monthly Crime Rate: Upperton

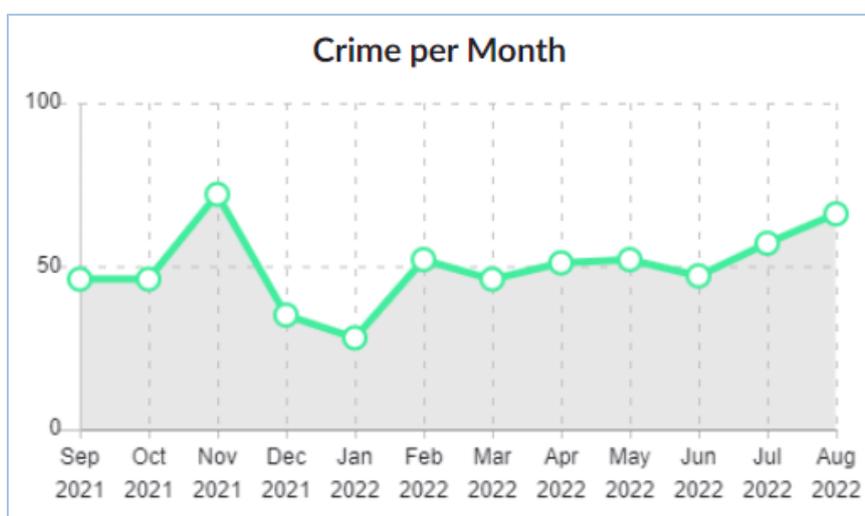


Figure 45 shows the monthly crime rate for the past 12 months for the Upperton area – which includes this centre – sourced from the East Sussex Police website. This is similar to the average monthly reported crimes for other centres within this report, and thus verifies our perception of this centre as being safe.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are open throughout the week during regular opening hours. The Waitrose Supermarket is open from 08:00 until 21:00 daily, with reduced Sunday hours.

There are few shops within this centre that contribute to the evening economy; there are three pubs, the Crown and the Star Inn (12:00 – 23:00 daily), and the Prince Albert, which has the same hours as the other pubs, with the exception of Fridays and Saturdays, when it is open until 01:00.

Barriers to Business Investment

We have noted some observations from our site visit that may present a barrier to new businesses:

- This is – excluding the Waitrose – a small collection of shops centred around an old high street. This means there are very few opportunities to develop without negatively impacting the vernacular of the location.
- The properties within this centre – again excluding Waitrose – are almost all small, period buildings that may limit the number of businesses that are capable of trading from them.
- There are a number of listed buildings in, and on the edge of, the centre that may limit possibilities for increased development in this centre.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Seaside (Langney Road to Springfield Road)

Introduction/ Context

Seaside (Langney Road to Springfield Road) is a centre formed along a main road, Seaside, that extends c. 0.3 miles north east from near the eastern edge of the Eastbourne town centre boundary.

The centre ends at Springfield Road, and whilst there is some retail/ commercial provision beyond this point along Seaside, this remains the logical end to the centre as the majority of buildings are residential from this point.

However, beyond the southern boundary at Langney Road there is a significant continuation of the retail offering between Langney Road and Sea Houses Square. We have included this within our updated boundary which is depicted in Figure 46.

The centre is defined as a District Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4 due to its predominantly retail-led function, however due to its proximity to Eastbourne town centre it is not the principal service location for the surrounding area, but is still its own distinct location, separate from the town centre.

There is a large section break in the retail provision on the eastern side of the Seaside parade, which is a large Army Reserve Centre.

Diversity of Uses

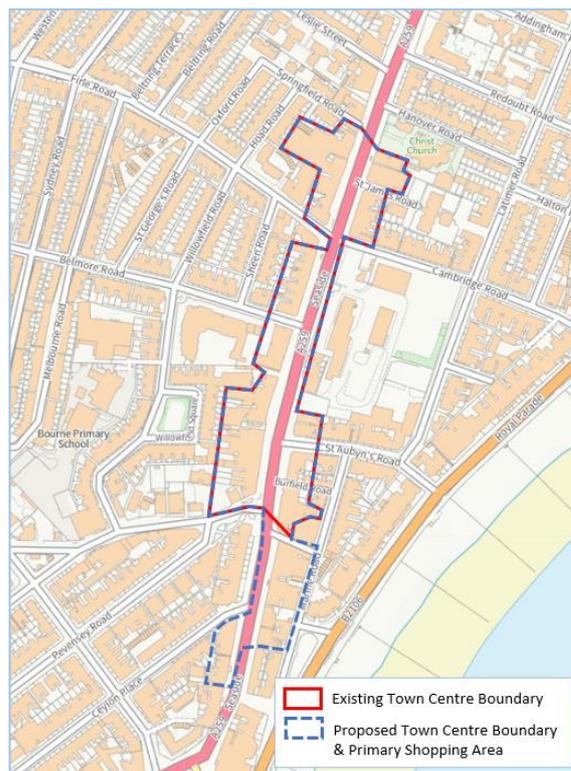
The breakdown of the use categories of this centre is summarised in figure 47. Whilst this table demonstrates a relatively even split in the number of units across various different uses – namely a relatively even proportion of comparison, convenience, retail services and leisure uses – when examining the types of uses within each use category shows a lower level of actual diversity.

Figure 47 –Seaside (Langney Road to Springfield Road) (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 15 | 22% |
| Convenience | 13 | 19% |
| Retail Services | 15 | 22% |
| Leisure | 17 | 25% |
| Financial & Business Services | 4 | 6% |
| Vacant | 5 | 7% |

For example, all but 5 of the leisure uses fall within the category of fast food and takeaway, with one betting shop, restaurant, and café, and two public houses. Similarly with convenience, the large proportion of the shops within this use category are classified as supermarkets or convenience stores or some variation on these two uses.

Figure 46 – Seaside (Langney Road to Springfield Road) With Annotated Proposed Changes to Boundary



As with most of the other Eastbourne centres, the majority of retail services within this centre are within the Health & Beauty category, and thus are barbers, hairdressers or other beauticians.

There is however a high variance in use types between comparison retail within this centre: there are second hand stores, record shops, electrical goods shops, furniture shops, toy shops and more, almost all of which are independent businesses.

The vacancy rate in this centre is only calculated on a per-unit basis and is relatively low compared to many centres within Eastbourne, and also on a national level. However, on our site visit to this centre we noted a number of residential conversions at ground floor level where there would have previously been retail, which indicates that a significant reason for the low vacancy rate in this centre is due to the – presumably permanent – removal of retail units from the centre.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents in the Seaside (Langney Road to Springfield Road) centre are currently assessed at c. £15.50 psf. This is lower than all but two centres within this report, indicating this centre is not considered desirable to prospective tenants relative to other Eastbourne centres.

Retailer Representation & Demand

The majority of retailers in this centre are independents, however there is one food store multiple in Sainsbury's, a Ladbroke's betting store, Premier convenience store, and a National Tyres and Autocare.

Customers' Experience & Behaviour

No respondents to the household survey cited this centre as being one which respondents visit most for their shopping and services, and four respondents or 0.3% stated most of their main food and grocery shopping is done at the Sainsbury's Local within this centre.

Accessibility

This centre is walkable from the town centre due to being only 0.6 miles from Eastbourne train station, and buses regularly run from the town centre along Seaside. Parking is almost exclusively on street, and there is no parking for any of the larger retail uses on the street. Due to the road being quite busy and wide, and the lack of dedicated crossing spots, crossing the road to access retail units on the opposite side may be difficult for some pedestrians.

Environmental Quality

The environmental quality of this centre is mixed. The overwhelming perception of the centre on our visit results from the fact that it is along a busy road, with quite a lot of fast moving traffic, making crossing difficult and combined with the number of cars parked on street lowering its attractiveness. Furthermore, a not-insignificant proportion of the shopfronts, the buildings above them, and the pavement along the road, are not maintained to a high standard which further detracts from the overall environmental quality of the centre.

From a positive perspective, the pavements are relatively wide and in some instances used by pubs and cafes for outside seating, and there are a lot of trees planted along the street, both of which enhance the environment within the centre.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 48 – Monthly Crime Rate: Seaside

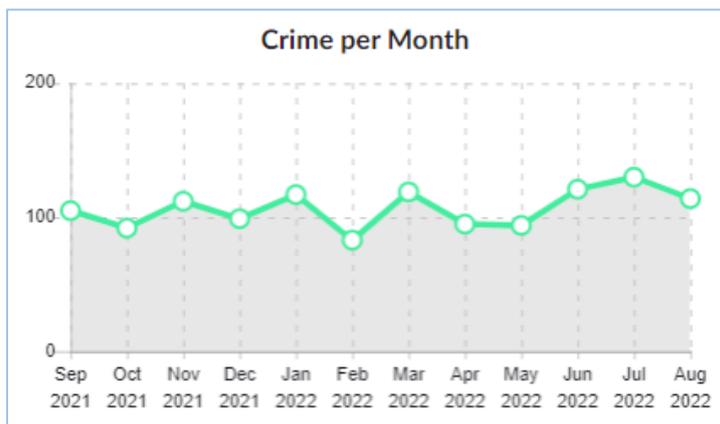


Figure 48 shows the monthly crime rate for the past 12 months for the Seaside area – which includes this centre – sourced from the East Sussex Police website. The reported crimes level for this centre is – at an average of approximately 100 per month – is elevated compared with the vast majority of centres assessed within this report.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are – at a minimum – open throughout the week during regular opening hours. However, there are also numerous take aways, restaurants, and a small number of pubs. These businesses are frequently open until 21:00 onwards, although as a large proportion of these businesses are take aways rather than restaurants, it is arguable the extent to which they contribute to the evening economy as they do not generate additional footfall.

Barriers to Business Investment

There are several significant barriers to potential investment from businesses in this centre, and these principal issues revolve around its proximity to larger retail areas at either end of Seaside. At the south western end of the street, this centre is in very close proximity – but not directly connected to – Eastbourne town centre, and Admiral Retail Park is located approximately 0.9 miles north east of the town centre.

These two retail locations provide a lot of local competition that may deter businesses from choosing to establish themselves within this centre. Admiral Retail park is better set up and located to accommodate shoppers arriving by car due to its more out-of-town location close to major arterial routes and a large provision of on site parking, and the town centre is better placed to attract pedestrians due to its more central location and higher concentration of shops.

New Development & Investment Proposals

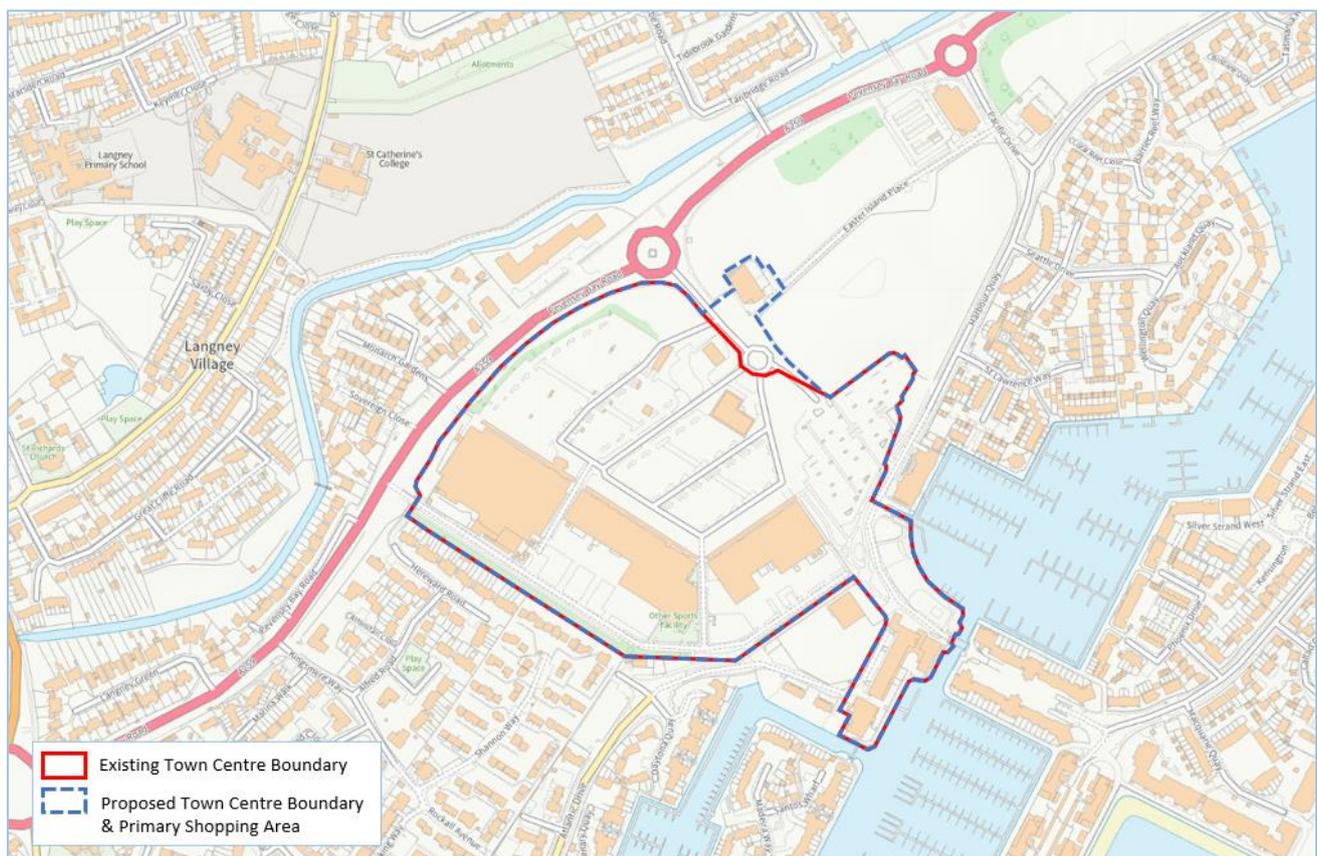
There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Sovereign Harbour Retail Park

Introduction/ Context

Sovereign Harbour Retail Park is approximately 2.4 miles north east of Eastbourne Town Centre, and is defined as a District Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4. This centre entirely comprises the shopping centre and surrounding car parks, as depicted in the map and boundary of the centre below, and contains 19 units across c. 237,000 sq ft, exclusive of the waterfront area, which is not covered by goad. This waterfront area contains an additional 26 units, the majority of which are bars/ restaurants.

Figure 49 – Sovereign Harbour Retail Park (With annotated proposed changes to boundary)



This centre is located on the edge of a suburban location, although the area directly around the centre is dominated by the presence of the large Pevensey Bay Road (A259) which bounds the retail park along its western border.

Directly to the north of the centre is a large, cleared site with Pacific House (c. 25,000 sq ft of dedicated office accommodation) in its north eastern corner, and a community centre in its south western corner. The remainder of the site is earmarked for further office development, which is expected to see an additional 94,000 sq ft floorspace delivered to complete the Sovereign Harbour Innovation Park.

Diversity of Uses & Vacancy Levels

Sovereign Harbour Retail Park is – in terms of its overall site area – a very large retail park, however much of this space is dedicated to on-site parking, and the diversity of uses is low as a result of this park predominantly comprising a few, large units.

Whilst the split between comparison and convenience floor area is relatively even, on a unit basis there is significantly more comparison floorspace – this is due to the presence of a very large (91,000 sq ft) Asda, whereas the average comparison unit size is c. 10,000 sq ft. These nine comparison units comprise a mix of uses including sports stores, furniture stores and clothing.

Only two of the units within the retail park are vacant, however due to the layout of the park and the reliance on larger units, these vacancies are very prevalent predominantly due to one (of nine) double-fronted, 32,000 sq ft store in the main centre being vacant. Vacancies also comprise the third-largest floorspace apportionment within the park.

Figure 50 –Sovereign Harbour Retail Park (Experian GOAD data)

| Use Categories | Units (Count) | Units (%) | Floorspace (sqft) | Floorspace (%) |
|-------------------------------|---------------|-----------|-------------------|----------------|
| Comparison | 9 | 47% | 90,400 | 38% |
| Convenience | 2 | 11% | 92,700 | 39% |
| Retail Services | 4 | 21% | 4,200 | 2% |
| Leisure | 2 | 11% | 15,900 | 7% |
| Financial & Business Services | 0 | 0% | 0 | 0% |
| Vacant | 2 | 11% | 33,600 | 14% |

Figure 51 – Sovereign Harbour Retail Park: Waterfront Area (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 0 | 0% |
| Convenience | 1 | 4% |
| Retail Services | 2 | 8% |
| Leisure | 12 | 46% |
| Financial & Business Services | 4 | 15% |
| Vacant | 7 | 27% |

Figure 50 summarises the GOAD statistics for the main retail park, and the above analysis is based on this information. However, the Waterfront Centre (in the eastern extension to the boundary) is excluded from the GOAD analysis. This additional retail centre contains a further 28 units, which have been summarised in figure 51⁸:

When considered alongside Sovereign Harbour Retail Park, this additional retail area supplements that provision well, with a significant proportion of leisure in the form of restaurants and bars.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Sovereign Harbour Retail Park are at c. £19.10 psf. This is similar to the majority of Eastbourne centres assessed in this report, and indicates that the centre is relatively healthy and performing well from a commercial perspective.

Retailer Representation & Demand

This is a large shopping centre comprising predominantly large units, meaning the vast majority of these units are multiples. PROMIS analysis does not cover this specific centre, and as such we have conducted our own analysis, which has been set out in figure 52 below.

Figure 52 – Retail Provision: Sovereign Harbour Retail Park (C&W Site Visit Data)

| Retail Provision - Site Visit September 2022 | | | |
|--|---|-------------|-----------------------|
| Key Fashion Multiples | Key Non-Fashion Multiples | Food Stores | Key Café/ Restaurants |
| Next TK Maxx | Timpson Boots Sports Direct Matalan Harvey's/ Bensons for Beds Wilko | Asda | |

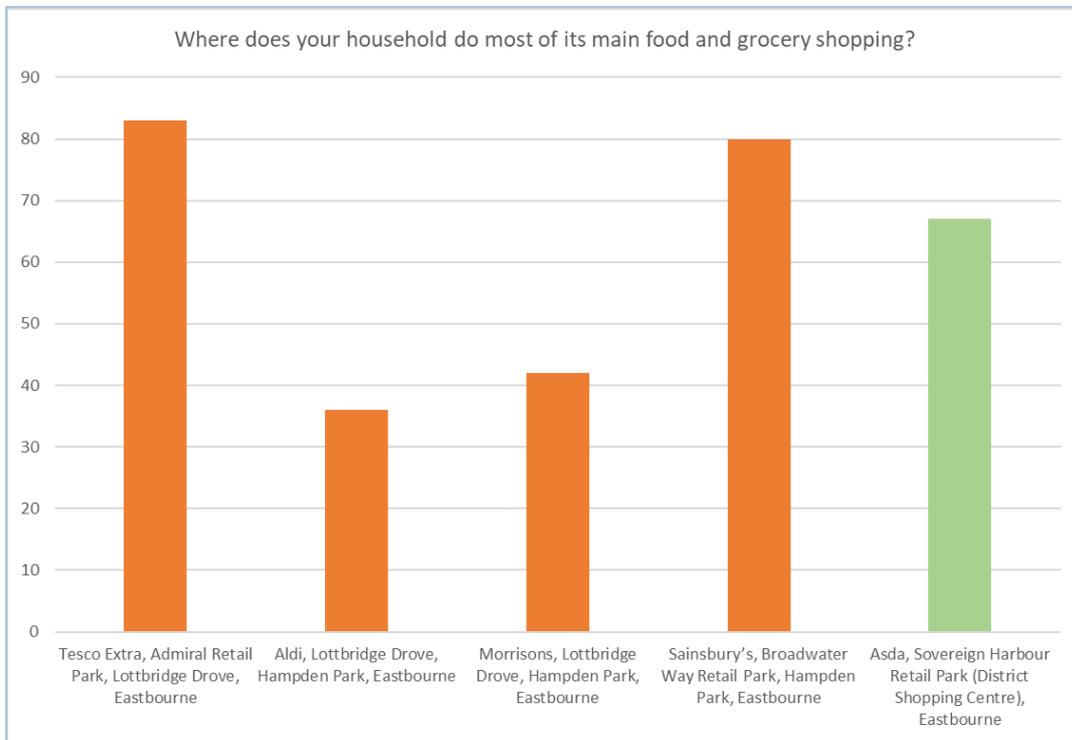
There are no independent businesses within the shopping centre itself, however the Waterfront Centre does contain a number of small independent (or small chain) leisure businesses.

⁸ N.B: This table includes first floor uses

Customers' Experience & Behaviour

Several themes can be drawn from the results of the household survey in relation to this centre. The following table (figure 53) shows the most frequently cited retail locations in Eastbourne, in response to the question “where does your household do most of its main food and grocery shopping?”. Asda within the centre has been highlighted in green. For the avoidance of doubt, the table indicates the total number of respondents (not the percentage market share).

Figure 53 – Responses to: “Where does your household do most of its main food and grocery shopping?”



This indicates that Asda at Sovereign Harbour is the third most popular destination for main food and grocery shopping in the Eastbourne area. The foodstore principally serves the needs of residents in catchment area zones 11 and 12 (i.e. the hinterland surrounding Sovereign Harbour and extending to the east of Eastbourne Borough).

Of those respondents who stated that their household most often visits Sovereign Harbour for shopping and services (a limited sample of 23 respondents), the following information can be gleaned from their answers:

- The shopping and services visits to Sovereign Harbour don't take place that frequently: 13 respondents (58.5%) said they visited once a week, with only two visiting more frequently than this, and the remaining 34% visit once a fortnight or less frequently.
- 76% of journeys to Sovereign Harbour are normally by car, either as the main driver or a passenger, and of these journeys:
 - o 52% responded that they don't tend to link this trip with another activity;
 - o 32% do, however, and this is typically either combined with a leisure activity or non-food shopping.

In terms of what these visitors liked about the centre, the majority of respondents (56%) suggested that it is easy to park. When asked what could be improved, the following answers were provided:

- The centre needs more and/ or better shops (one respondent)
- Fewer empty shops (one respondent)
- Improved or an increase in the amount of leisure, entertainment and culture provision within the centre.

Accessibility

Accessibility to this centre is very good for car users, with direct access from the main road and lots of parking. There is also a bus stop directly outside the centre on the A259 that provides access as far as Hastings in addition to Eastbourne

town centre. Pedestrian access is possible but not advisable – on our visit there was no pavement from which to access the centre from the south.

As mentioned above, the Waterfront Centre is segmented from the main road by the main retail park; visibility towards this retail area is low and access is unclear.

Environmental Quality

This centre is an outdoor retail park in a car-dominant location. There is lots of parking (almost 40% of the overall site area) and the centre is bound on its main western edge by the very large Pevensey Bay Road (A259), both of which combine to severely detract from the overall environment of the park; something that is further exacerbated by the design of the retail which are in an industrial shed-style format.

Towards the waterfront has a significantly better environment: These retail units face the water, are located on a predominantly pedestrianised towpath, and the leisure uses have large outdoor spaces. This area is very segmented from the main retail park as it sits behind some of the large retail units, and as such it is not able to contribute positively to the wider centre, but rather remains in isolation an attractive centre.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the centre was that it is safe.

Figure 54 – Monthly Crime Rate: Sovereign Harbour



Figure 54 shows the monthly crime rate for the past 12 months for the Sovereign Harbour area – which includes this centre – sourced from the East Sussex Police website. This is significantly below the majority of the centres assessed within this report and indicate that our analysis regarding the safety of this centre is accurate and it is generally safe.

Opening Hours & the Evening Economy

The main Sovereign Harbour retail park contains an Asda Superstore that is open from 07:00 to midnight Monday to Friday, and 22:00 and 16:00 on Saturdays and Sundays respectively. The remainder of the stores within the retail park are open from 09:00 until between 18:00 and 21:00.

Given the presence of a significant amount of leisure within the Waterfront Centre, there is more provision that contributes to the evening economy, with the restaurants and bars here generally closing after 21:00.

Barriers to Business Investment

The principal barrier within the main shopping centre is the fact that the units within the centre are generally very large, and therefore the types of tenant capable of taking the space is restricted to larger, more established businesses due to the increased rental burden associated with letting such a large floor area.

New Development & Investment Proposals

No recent development or investment has taken place in Sovereign Harbour Retail Park or the Waterfront Centre.

Outline Planning Permission was granted in 2014 for 150 dwellings, Community Use (c. 8,600 sqft), Employment and Office Uses (up to c. 160,000 sqft), and additional Commercial and Employment Uses of unspecified size, on eight sites around the Harbour. One of these sites (Site 4) is within the designated centre and has outline planning permission as part of this larger permission for c. 35,000 sqft of commercial and employment space and c. 145,000 sqft of D1 space. Our understanding, based on Council advice, is that this could be changed to retail/ leisure at ground floor, with residential above.

Whilst not directly within the centre, a scheme that has the potential to significantly positively influence the centre is the development of Sovereign Harbour Innovation Park; this is a 5.5 acre development site being delivered by Sea Change Sussex. The first phase of this development – Pacific House – is a 25,000 sq ft office block that completed in September 2014, and the remainder of the site has the capacity for c. 120,000 sq ft of additional space, although this is yet to commence.

Although this proposal is at very early stages and therefore has no associated planning permission, Sovereign Harbour Boatyard (SO15) to the west of the designated centre has been identified in the LAA as potentially being capable of accommodating c. 21,500 sq ft of retail/ leisure space, with 20 residential units above.

Rodmill

Introduction/ Context

Rodmill is a small centre comprising nine retail units in a short row of shops along Framfield Way. This centre was classified as a Local Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4, meaning it caters primarily for the day to day needs of the nearby area or those passing by. This level of retail provision remains unchanged at the date of this assessment.

Figure 55 – Rodmill



The centre is approximately 1.2 miles north of Eastbourne Town Centre, and is one road away from both the Eastbourne District General Hospital and East Sussex College Eastbourne, making it the nearest retail centre/ shops for users of the hospital and students of the college.

Diversity of Uses & Vacancy Levels

The level of diversity within this centre is low, although this is simply a reflection of its small size and in fact the centre provides an appropriate breadth of uses for its size. There is a Co-op mini supermarket, a bakery, a post office/ newsagent, two takeaways, as well as a hairdresser, flower shop and betting shop. The majority of these businesses are independent, with the exception of the Co-op and betting shop.

Figure 56 – Rodmill (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 1 | 11% |
| Convenience | 2 | 22% |
| Retail Services | 1 | 11% |
| Leisure | 4 | 44% |
| Financial & Business Services | 1 | 11% |
| Vacant | 0 | 0% |

There are no vacancies within this centre, and this has remained the case since at least 2018.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Rodmill are at c. £20.58 psf. This is broadly aligned with other Eastbourne centres analysed within this report. Whilst this generally indicates the centre is strong, the caveat with this centre is that the size of the centre reduces the opportunity for new businesses to locate here, thus potentially pushing rents up when there is availability. However, given the other statistics provided regarding this centre – principally its consistent lack of vacant space – it is reasonable to conclude that in this location the strength of the centre, at least at this level of provision, rather than limited supply, is what is keeping rents high.

Retailer Representation & Demand

The Rodmill town centre has nine retail units, of which two are national multiples: Betfred betting shop and Co-op mini supermarket. Beyond these units, the remaining businesses are all independents and include a convenience store and post office, a barbers, a bakery, a café, a take away fish and chips restaurant, a financial services business and a florists.

Customers' Experience & Behaviour

Due to the small size of Rodmill centre, it is not captured in much detail by the household survey; the only response where it is cited relates to the question regarding where shoppers do most of their top up food and convenience goods shopping (with the Co-op having nine respondents or 0.6% of the total survey respondents to this question). Seven of these respondents were situated in Zones 8 or 9, both of which have boundaries in close proximity to this centre, meaning it is likely serving customers that are predominantly local to the centre.

Accessibility

This centre is very local, but does have some customer only off-street parking as well as some additional spaces on-street, which will allow users to access the centre from further afield than just the local residential area. Given its proximity to the hospital and College, it is likely that this centre serves users of these facilities on foot, however given the low-density housing and main roads that surround the centre, it is unlikely pedestrians from further afield are using these shops.

Environmental Quality

This is a very small shopping parade that predominantly serves the local housing nearby. The shops are located on an elevated pedestrianised route above a small road which is a positive. The centre is tucked away in a quiet side road and so is not overly busy, however there are a number of large roads nearby.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the centre was that it is safe.

Figure 57 – Monthly Crime Rate: Rodmill



Figure 57 shows the monthly crime rate for the past 12 months for the Rodmill area; this crime rate fluctuates between c. 12 instances of crime reported per month up to c. 38 instances, which is at the lower end of reported crimes within the centres in this study. As such we are content that this verifies our perception that the centre is generally safe.

Opening Hours & the Evening Economy

There is virtually no evening economy in this location beyond the Co-op, which closes at 22:00 daily, the two takeaways – Marine Fish & Chips and Uncle Sam’s – which are open until 21:00 and 22:00 respectively, and the Betfred betting shop, which is open until 21:00.

The remainder of the units all keep regular opening hours throughout the week.

Barriers to Business Investment

We have noted several factors from our site visit that may present issues for any new business looking to set up in this location:

- The centre itself is clearly predominantly serving a very local customer base, which puts a cap on both the number of prospective customers, and also the types of use that will be appropriate in this location.
- Based on the fact that this is a small, local centre, Rodmill likely already has adequate provision of convenience/grocery uses in the form of the Co-op, meaning a competitor store would likely not choose to move to this location.
- There are only nine units, and furthermore these are all occupied and rarely see tenants vacate, meaning it would be difficult for businesses to move to this location even if they wanted to.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

St Anthony's (Beatty Road)

Introduction/ Context

St Anthony's (Beatty Road) is defined as a Local Shopping Centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4, and is surrounded by predominantly semidetached houses and residential streets. The centre comprises nine retail units.

Figure 58 – St Anthony's (Beatty Road)



It is located approximately 2 miles north east of Eastbourne town centre, but its nearest retail centres are Seaside (Seaford Road to Channel View Road – detailed below) and Sovereign Harbour Retail Park. Admiral Retail Park is a closer shopping area of scale than Sovereign Harbour, but is not included within this study as a town centre.

Diversity of Uses & Vacancy Levels

The diversity of this centre is limited by its size and its location. The level of diversity is appropriate for the community it is serving – it has a Co-op mini supermarket, bakery, newsagent, a dentists, a health and beauty shop, and two estate agents and café/ fast food vendors. The centre has no vacancies, and this has been the case since at least 2019.

Figure 59 – St Anthony’s (Beatty Road) (C&W Site Visit Data)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 1 | 11% |
| Convenience | 2 | 22% |
| Retail Services | 1 | 11% |
| Leisure | 4 | 44% |
| Financial & Business Services | 1 | 11% |
| Vacant | 0 | 0% |

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for St Anthony’s (Beatty Road) are at c. £20.58 psf. This is at the upper end of Eastbourne centres analysed within this report, excluding the Town Centre. Whilst this generally indicates the centre is strong, the caveat with this centre is that its small size reduces the opportunity for new businesses to locate here, thus potentially pushing rents up when there is availability as there is greater competition for fewer available units.

However, given the other statistics provided regarding this centre – principally its consistent lack of vacant space – it is reasonable to conclude that in this location it is more the strength of the centre, at least at this level of provision, than limited supply, keeping rents high.

Retailer Representation & Demand

St Anthony’s (Beatty Road) centre has nine retail units, of which one, the Co-op is a national multiple retail business. Beyond this retailer, the remaining businesses are all independents, including two café/ take aways, two estate agents, a bakery, two health and beauty services, and a convenience store.

Customers’ Experience & Behaviour

Due to the small size of the St Anthony’s (Beatty Road) centre, it is not captured by the household survey in statistically meaningful amounts. This confirms the conclusion that this centre is only serving the local population.

Accessibility

This centre is very local, but does have some customer only off-street parking. However it has no on street parking nearby, and at the time of our visit the car park was very full, limiting access to the centre by car. Given the low-density housing and that surrounds the centre, it is unlikely pedestrians from further afield than local residents are using these shops.

There is a bus stop directly outside the centre served by the 5A and Loop bus routes, providing access to Eastbourne Town Centre, through to Pevensy Bay, as well as other centres within Eastbourne such as Hampden Park.

Environmental Quality

This is a very small shopping route within a suburban housing area, with small amounts of green space nearby. The frontage of the centre is dominated by the off street parking, which sits in several rows between the shops and the main street. There is very little street furniture beyond the bus stop.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 60 – Monthly Crime Rate: St Anthony’s and Langney Point

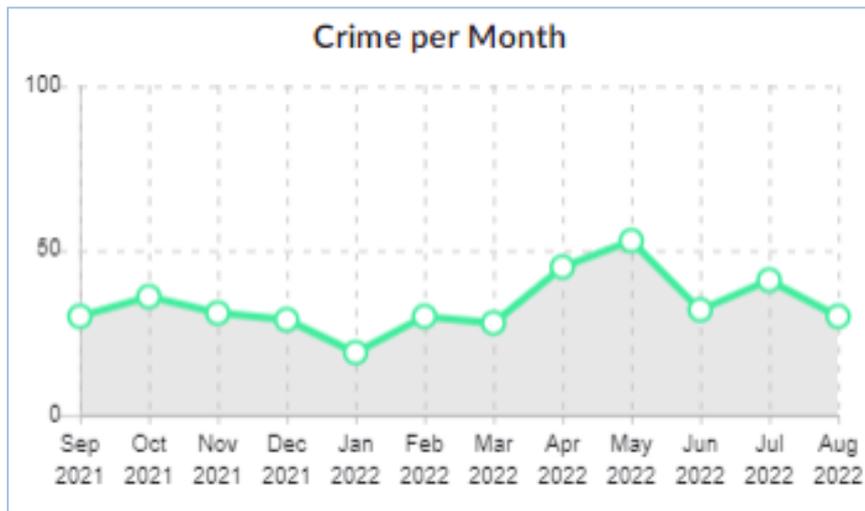


Figure 60 shows the monthly crime rate for the past 12 months for the St Anthony’s and Langney Point area – which includes this centre – sourced from the East Sussex Police website. The monthly crime statistics verify our conclusion that this is a generally safe centre as for the most part the monthly crime rates are similar to those in other centres within this study.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are open throughout the week during regular opening hours.

The Co-op mini supermarket is open from 7:00 until 22:00 every day of the week, including weekends. The only leisure use that could reasonably contribute to the evening economy in this location is the Sovereign Fish Bar, which is open for lunch from 11:30 until 14:00 and for dinner from 16:30 until 21:00.

Barriers to Business Investment

This centre is local-focused and so there is a limit to the number of customers that can be accessed. There are two very large retail centres nearby which likely limit the catchment of this centre. There are no vacancies, and all the same tenants have been in place since at least 2019, reducing opportunities for new businesses to move here in its current format.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Seaside (Seaford Road to Channel View Road)

Introduction/ Context

Seaside (Seaford Road to Channel View Road) is a local shopping centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4. It is formed along Seaside, a main road that runs south west to north east from the edge of Eastbourne town centre and onwards to Langney Roundabout. Whilst there is sporadic retail provision along Seaside both before and after this centre, the centre has the highest concentration of retail along this main road away from the centre Seaside (Langney Road to Springfield Road) assessed above.

The surrounding area is predominantly residential, although some notable non-residential attractions are present nearby, such as Eastbourne United Football Club and Princes Park.

On our visit we noted the Public House excluded from the corner of the terrace of shops between Windermere Crescent and Churchdale Road has been redeveloped as residential with retail at ground floor, and this retail is trading as a Co-op.

Figure 61 – Seaside (Seaford Road to Channel View Road)



Diversity of Uses & Vacancy Levels

As this centre is not covered by GOAD, we have relied on our site visits to provide an up-to-date audit of trading businesses within this centre. As such, this analysis will be undertaken on a per-unit basis instead of a floor area basis. However, larger shops (such as the Tesco and Clearwell Mobility units) are two shop fronts combined and have been counted as such, which we consider to be an appropriate proxy for undertaking this analysis on a floor area basis.

Figure 62 – Seaside (Seaford Road to Channel View Road)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 5 | 26% |
| Convenience | 6 | 32% |
| Retail Services | 1 | 5% |
| Leisure | 4 | 21% |
| Financial & Business Services | 0 | 0% |
| Vacant | 3 | 16% |

There is a relatively even provision within this centre across comparison, convenience and leisure. In terms of convenience, there is a reasonable level of variance given the small size of the centre, with two mini-supermarkets, a convenience store/ newsagents, a butcher and a delicatessen. The comparison uses are not as varied – there are two (across three stores) shops dedicated to selling mobility scooters, a home security store and a furniture store. As with the majority of the smaller centres within this study the leisure uses are not varied, and all fall within either the café or fast food & takeaway category.

On the date of our visit, three units were vacant, although one restaurant unit appeared to be undergoing refurbishment ahead of a new business moving in, a further vacant unit was the post office, and the final vacant unit was previously another convenience shop opposite the Co-op, and which is currently being marketed to new tenants. Furthermore, whilst counted as an operational leisure use within this section due to the unit being fully furnished upon our inspection, it is our understanding that Seaside Fish & Chips is also no longer operating, which would bring the vacancy rate up to 21% of all units. This is higher than the PROMIS 200 retail centre average vacancy rate of 19.1% of town centre units.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Seaside (Seaford Road to Channel View Road) are at c. £20.50 psf. This is similar to the majority of Eastbourne centres assessed in this report, and indicates that the centre is relatively healthy and performing well from a commercial perspective.

Retailer Representation & Demand

The Seaside (Seaford Road to Channel View Road) centre has 19 retail units, of which three are currently vacant.

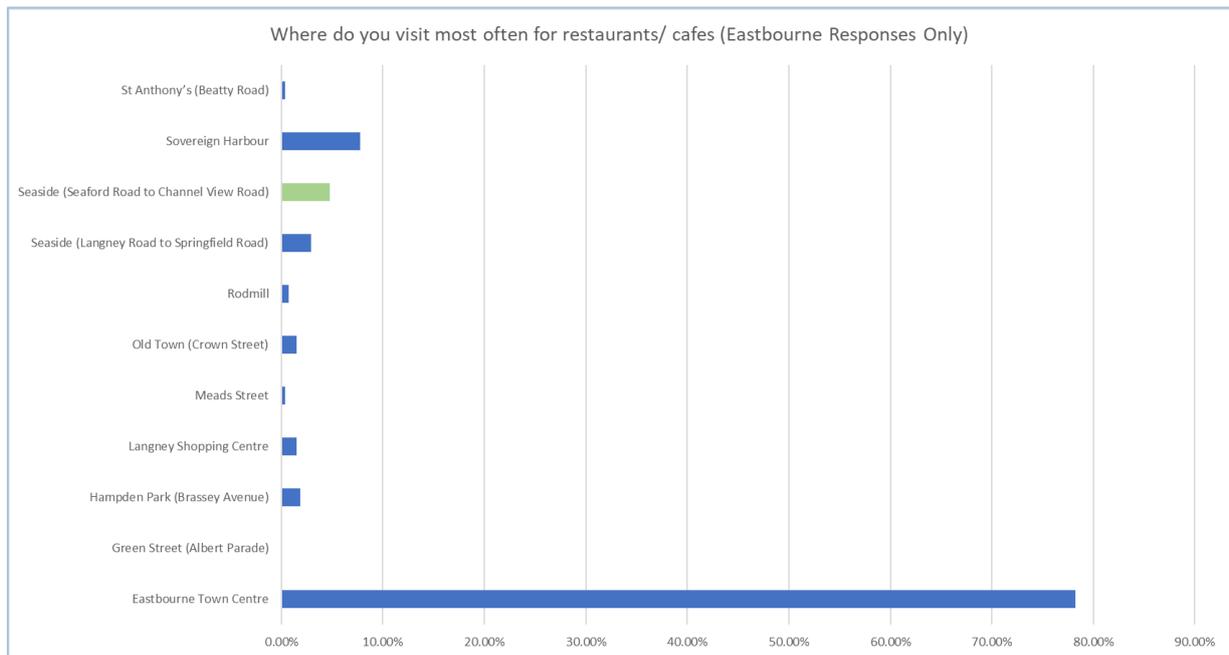
Regarding the tenanted units, two are major national retailers in Tesco and Co-op and a further tenant, Clearwell Mobility, is a large multiple. The remaining units are let to small, local businesses.

Customers' Experience & Behaviour

The household survey paints a picture of a centre that is not a primary shopping location for either food and grocery shopping, or general shopping and services, with only 6 (0.4%) and 5 (0.3%) respondents respectively identifying this centre as the main location for these types of shopping trip.

The number of respondents who complete small scale top-up shops for food and convenience goods in this location is slightly higher at 18 (1.2% of total respondents), which aligns with the size and local catchment of these shops.

Figure 63 – Responses to: “Where do you visit most often for restaurants/ cafes?” (Eastbourne Responses Only)



Interestingly, 13 respondents (1.38%) consider this centre to be their primary location for restaurants and cafes. Whilst this is a low proportion of all respondents, when only Eastbourne centres are included, this centre is the third-most cited, as demonstrated within Figure 63, in which Seaside (Seaford to Channel View Road) has been highlighted in green.

Accessibility

This centre predominantly serves the local area, and only has limited on street parking, with the exception of ten customer parking spaces on the Co-op site. Much of the on-street space was being used at the time of our visit, limiting accessibility. Several bus routes serve this centre, providing access to Eastbourne Town Centre and onwards to both Admiral, Sovereign Harbour Retail Park and Langney Shopping Centre.

Environmental Quality

This centre sits on a relatively major thoroughfare into and out of Eastbourne, although at the time of our visit it was not very busy meaning the potential negative influence from traffic was dampened. The centre itself is quite short at approximately 0.1 miles in length, and so the one protected crossing point appeared adequate and well positioned. Shop fronts were broadly well maintained and the wide pavement provides a degree of separation from traffic, and whilst a lack of planting or street furniture is a negative, there is a lot of green space nearby.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 64 – Monthly Crime Rate: Roselands and Bridgemere

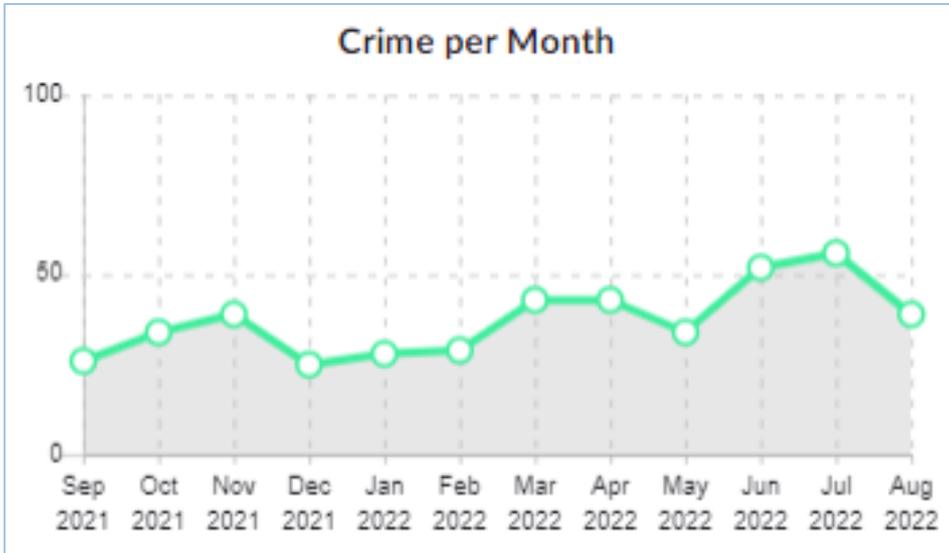


Figure 64 shows the monthly crime rate for the past 12 months for the Roselands and Bridgemere area – which includes this centre – sourced from the East Sussex Police website. The monthly crime statistics, which are broadly aligned with the majority of centres assessed within this report, verify our conclusion that this is a generally safe centre.

Opening Hours & the Evening Economy

Most of this centre’s shops and services are open throughout the week during regular opening hours.

The Co-op mini supermarket is open from 7:00 until 22:00 every day of the week including weekends, and the Tesco Express is open an hour longer each day in both the morning and evening.

There are two leisure uses that we would expect to contribute to the evening economy in this location. One take-away, the Seaside Grill, is open from 17:00 until 23:00 Sunday – Thursday, and until midnight on Friday and Saturday. The other is Mr India restaurant and take-away, which is open from 17:00 until 22:30 every day.

Barriers to Business Investment

Given the relatively new development of a residential block with Co-op within the ground floor retail unit, in addition to the presence of a Tesco Express also situated within this centre, it is reasonable to conclude that further large convenience retailers are unlikely to consider this a viable location. This centre is also very close to several large retail parks that will provide further competition.

There are vacancies in the centre, so there is space available for new businesses should they wish to move to this location.

New Development & Investment Proposals

There has been a redevelopment of some importance to this town centre, which is the demolition of the previous pub and replacement with a four storey building comprising ground floor retail and nine flats on the upper floors. Planning permission for this scheme was granted in 2011, and we understand the Co-op was open and trading by 2015.

There have been no other developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

The Broadway (Hampden Park)

Introduction/ Context

The Broadway (Hampden Park) is a local shopping centre as defined by the Eastbourne Core Strategy Local Plan (2013) Policy D4. It is set within an almost exclusively residential location, surrounded as it is by predominantly low-density housing. This centre as shown in figure 65 comprises twelve retail units, however on our site visit we noted the development of a new Co-op food store on the site of the former public house depicted to the north of the centre boundary.

Figure 65 – The Broadway (Hampden Park)



The nearest competing retail centre is Hampden Park (Brassey Avenue) which is analysed within this report, and which is situated approximately 0.5 miles east of this centre.

Diversity of Uses & Vacancy Levels

As GOAD plans are not available, we have undertaken a unit count by use category when on site. As with other centres where this is the case, where an individual shop trades from several shop units, these have been counted separately as a proxy for the additional floor area that they are occupying.

Secondly, two of the units within this centre have been identified as “other” and so are not included within this table. These units are a single South Coast Wellbeing and Training centre.

Figure 66 – The Broadway (Hampden Park)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 1 | 10% |
| Convenience | 3 | 30% |
| Retail Services | 1 | 10% |
| Leisure | 5 | 50% |
| Financial & Business Services | 0 | 0% |
| Vacant | 0 | 0% |

As with the majority of the smaller, local shopping centres assessed within this report, there is a limit to the level of diversity that is possible given the low number of retail units. The majority of these uses are leisure, however as with many smaller centres these have been exclusively categorised within fast food & takeaway, with the exception of one café.

Three of the four units counted within the convenience category in this analysis are one Premier convenience store that occupies three shopfronts;

On the date of our site visit there were no vacancies within this centre, although a number of changes have taken place in the last ten years:

- Change of use from a vacant pub, and let to the current Co-op in July 2014
- The Premier unit was vacant for an extended period prior to the lease being signed in October 2019
- Unit 20 was vacant for an extended period prior to New China – the current tenants – signing a lease in November 2018.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for The Broadway (Hampden Park) are at c. £16.50 psf. This is lower than all but three centres within this report, indicating this centre is not considered desirable to prospective tenants relative to other Eastbourne centres.

Retailer Representation & Demand

The Broadway (Hampden Park) centre comprises ten retail units, of which two, the Co-op and the Premier Convenience Store are retail multiples. Beyond these two retailers, the remaining businesses are all small, local independents.

Customers' Experience & Behaviour

Due to the small size of Broadway (Hampden Park) centre and its presence near several larger centres, it is not captured in much detail by the household survey; the only question where the centre is captured in notable (albeit still low) numbers relates to where shoppers do most of their top up food and convenience goods shopping. The Co-op and Premier Convenience Store combined have seven – or 0.5% of the total – survey respondents to this question.

Accessibility

Accessibility to this centre is relatively low. There is very restricted on street parking within the centre, although this space was relatively unused at the time of our visit. If all used, there is some possibility of parking on street away from the centre on the surrounding residential streets.

There is a bus stop directly outside of the centre that is served by the 1A and Loop buses, which provide services into the town centre and out again to near Stone Cross on both routes. There is a large customer car park outside the Co-op.

Environmental Quality

The environmental quality of this centre is relatively low; the Broadway itself is predominantly a small, poorly surfaced loop road around the retail provision. The pedestrian paving is of similar quality to the road surface. The retail units themselves are in some instances well-maintained, but generally look old and tired, as do the buildings themselves.

Whilst the Co-op we have included is significantly newer than the remainder of the centre, this shop still suffers from similar issues. The frontage of the store is compromised by the large amount of poorly-surfaced car parking space with little else to enhance the overall environment beyond a small amount of grass and trees bordering the car park.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 67 – Monthly Crime Rate: Hampden Park

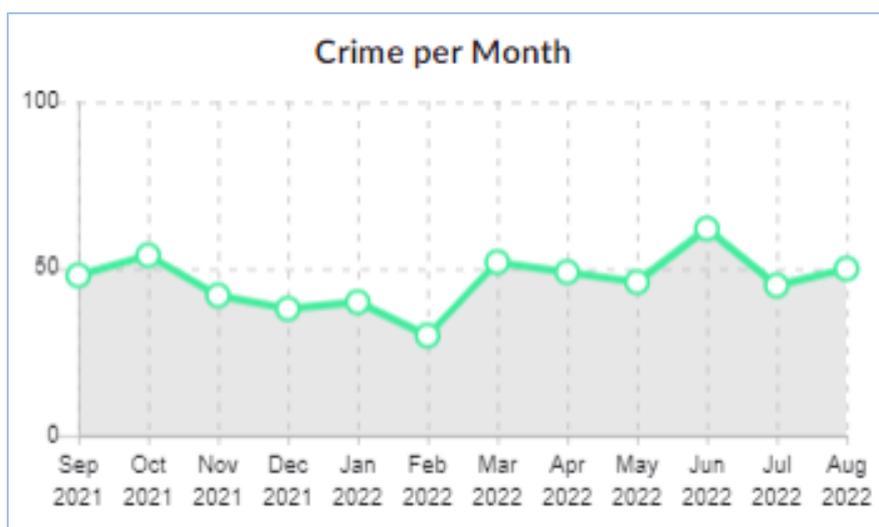


Figure 67 shows the monthly crime rate for the past 12 months for the Hampden Park area – which includes this centre – sourced from the East Sussex Police website. The monthly crime statistics, which are broadly aligned with the majority of centres assessed within this report, verify our conclusion that this is a generally safe centre.

Opening Hours & the Evening Economy

The Co-op and premier supermarket/ convenience stores are open 6:30 – 22:00 and 8:00 – 23:00 every day respectively. In terms of other uses that can contribute to the evening economy, there are a number of take-away shops that close between 21:00 and 23:30 every day including weekends.

Barriers to Business Investment

The main barriers to business investment in this location will likely revolve around the small size of this centre and the proportionately small catchment area, and the low quality of the built environment surrounding the centre. Additionally, there is a lack of available space for new tenants to rent should they wish to move to this location, and there is a large business that sells a wide range of goods in the Co-op that will be difficult to out-compete.

New Development & Investment Proposals

The most recent development in this centre is the Co-op we have proposed should be included within the town centre boundary. This was a change of use application submitted in 2013 proposing to change the existing public house into a supermarket with car parking in front of the store. There have been no developments of scale in this centre since this development completed, and it is our understanding that there are no proposals for additional investment or development in the near future.

Queens Parade (Hampden Park)

Introduction/ Context

Queens Parade (Hampden Park) is a local centre as defined by the Eastbourne Core Strategy Local Plan (2013) Policy D4 situated approximately 0.15 miles north east of Hampden Park railway station. It is in close proximity to one other town centre analysed within this report, Hampden Park (Brassey Avenue), in addition to a further major out of town retail park, Hampden Retail Park.

Figure 68 – Queens Parade (Hampden Park)



The centre itself comprises ten retail units and some off-street parking. It is bound to the east by the Hydneye, and to the south by Mountfield Roundabout.

Diversity of Uses & Vacancy Levels

As with many of the smaller local centres assessed within this report, the low level of retail provision in this location means diversity is limited simply by the number of units within the centre. This centre has been assessed on a unit by unit basis rather than on a floor area basis as it is not covered by GOAD.

Figure 69 – Queens Parade (Hampden Park)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 0 | 0% |
| Convenience | 4 | 40% |
| Retail Services | 3 | 30% |
| Leisure | 2 | 20% |
| Financial & Business Services | 0 | 0% |
| Vacant | 1 | 10% |

Whilst only one of these units is listed as vacant within this assessment, at the time of our visit every unit with the exception of Morrisons (which lets three units) and a very small hair salon appeared to be shut, in most instances these shops had their shutters closed. These units had reasonably well maintained shop fronts and no letting signs outside and so it was difficult in this instance to conclude these shops were in fact no longer trading.

On the basis of our visit it is difficult to conclude that this is a diverse, flourishing centre.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Queens Parade (Hampden Park) are at c. £19.30 psf. This is similar to the majority of Eastbourne centres assessed in this report, however in this instance we do not consider this to be truly reflective of the health of this centre specifically on the basis of our site visits. The areas around this centre – namely Hampden Retail Park and Hampden Park (Brassey Avenue) – are generally performing well, and likely contribute to the rental figure for this centre, thus elevating the rental assumption beyond an achievable rate for this centre specifically.

Retail Representation & Demand

This centre comprises ten retail units, of which only the Morrisons is a national multiple retail business. The remainder of the tenants are small, local businesses, although it is important to note as above that the vast majority of these businesses were shuttered when we visited during normal operating hours, and a further unit is vacant.

Customers' Experience & Behaviour

Due to the small size of Queens Parade (Hampden Park), and the presence nearby of several significantly larger centres, this location does not appear in the household survey responses with any frequency.

This aligns with our conclusions that this is a centre aimed at serving localised needs albeit one which is struggling, in part due to competition from other nearby centres or retail parks.

Accessibility

Accessibility to this centre is good, it is in close proximity to a rail station, a bus stop with a variety of routes, and road access, albeit with parking limited to the c. 20 off-street parking spaces outside the retail parade.

Environmental Quality

The environmental quality of this site is very low. It sits facing directly onto a main road and a large roundabout, and as highlighted above many of the units were shuttered at the time of our visit, during the day. The retail parade itself is in a reasonable state of repair and the shop fronts are well maintained, but pavements and the parking area at the front of the site are poorly-maintained.

Perception of Safety

At the time of our visit the centre was busy, predominantly as a result of people passing through with children leaving school and thus our perception of safety was that this was a safe centre.

Figure 70 – Monthly Crime Rate: Hampden Park



In order to verify this, we have provided crime figures for the centre. Figure 70 shows the monthly crime rate for the past 12 months for the Hampden Park area – which includes this centre – sourced from the East Sussex Police website. The monthly crime statistics, which are broadly aligned with the majority of centres assessed within this report, verify our conclusion that this is a generally safe centre.

Opening Hours & the Evening Economy

The Morrisons Daily is open from 6:00 to 22:00. The only other shop that was clearly open at the time of our visit was Scott & Anna’s Barbers, which is open 9:00 – 18:00 most days.

Barriers to Business Investment

The main issues for this centre regarding opportunities for business investment result from the significant pressure from the retail centres and large retail parks nearby. There is a variety of large shops including a very large Morrisons, an Aldi, and a number of other large comparison retailers.

Furthermore, as described above this is not an attractive setting, which in particular combined with its situation will likely make it an unappealing location in which to start a business.

New Development & Investment Proposals

There have been no developments of scale within this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Of particular importance for this centre however is the development of several large supermarkets outside but in very close proximity to the centre. The Aldi situated to the south of this centre opened in 2016, and the Morrisons superstore opposite Aldi was completed prior to 2015.

Old Town (Victoria Drive)

Introduction/ Context

Old Town (Victoria Drive) is a small, local centre as defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4. The centre comprises only five shops on Victoria Drive, in the Old Town area in the north west of Eastbourne, approximately 1.35 miles from the town centre. The nearest larger retail centres to Victoria Drive are Green Street (Albert Parade) c. 0.2 miles south of this centre and Old Town (Crown Street), a further c. 0.6 miles south east beyond Green Street.

Figure 71 – Old Town (Victoria Drive)



Diversity of Uses & Vacancy Levels

The level of diversity in this centre is always going to be low due to the small number of retail units. However, in spite of this small provision of retail, there is in fact a fair spread of uses, with a convenience store, newsagents, pharmacy, medical (podiatry) centre and hairdressers.

Figure 72 – Old Town (Victoria Drive)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 1 | 25% |
| Convenience | 2 | 50% |
| Retail Services | 1 | 25% |
| Leisure | 0 | 0% |
| Financial & Business Services | 0 | 0% |
| Vacant | 0 | 0% |

There are no vacancies in this centre, and have been none since at least 2016.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre. Due to the very small size of this centre and the infrequency with which tenants let space, the level of information available to Costar is so limited it is unable to provide an estimate of the rental performance in this location.

The nearest centre to this is Green Street (Albert Parade), where Costar Estimates rents at c. £19.00 psf. We consider it appropriate to apply a reduction to this level to reflect this centre’s distance from Green Street as the main retail parade in the area. As such, we have applied a 25% discount to this figure, resulting in a rent figure of £14.25 psf. We consider this analysis and final rent figure to reflect the secondary nature of this centre.

Retailer Representation & Demand

Old Town (Victoria Drive) centre has four retail units. Two of these units are let to smaller regional multiples in Kamsons Pharmacy and Premier Convenience Stores, and the remainder of the units are occupied by small local businesses.

Customers’ Experience & Behaviour

Due to the small size of Old Town (Victoria Drive), and the presence nearby of larger centre(s) with more provision of all types, this location does not appear in the household survey responses with any frequency. This aligns with our conclusions that this is a centre that has a very localised catchment.

Accessibility

There is no allocated parking at this centre, and directly in front of the retail parade there are parking restrictions that stop parking at all times, although just north on Victoria Drive there is a small amount of on street parking. Given the small, local nature of much of the retail in this location, and the presence of larger centres with additional parking nearby, the likelihood is that much of the access to this centre is on foot from a very small catchment area.

There is a zebra crossing directly outside the centre, allowing easy access to the retail parade.

Environmental Quality

The environmental quality of this centre is fair. The shops and parade are well maintained, and the pavement in front of the shops is very wide. However, it is on a relatively busy main road, and this combined with little street furniture create few opportunities to remain within the centre when not visiting the shops.

Perception of Safety

This is a very small centre, and there were similarly very few users of the centre or pedestrians, meaning we identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day.

We have sought to verify this with Sussex Police crime statistics for the Old Town area, as there is no information available that relates directly to this centre and this is the closest area statistics are collected for.

Figure 73 – Monthly Crime Rate: Old Town



A graph of these statistics for the last 12 months on a monthly basis has been provided in figure 73. This crime rate fluctuates between c. 8 instances of crime reported per month up to c. 18 instances, which is at the lower end of reported crimes within the centres in this study. As such we are content that these statistics verify our perception that the centre is generally safe.

Opening Hours & the Evening Economy

There is very little in the way of an evening economy in this location. The convenience store and newsagents are open daily from 5:00 until 20:00 and 7:00 until 22:00 respectively. The remaining shops keep normal retail hours.

Barriers to Business Investment

This centre is in very close proximity to Green Street (Albert Parade), which has a much higher diversity of uses across a larger centre, including two supermarkets, which likely limits the overall viability of several uses in this location, most notably supermarkets and leisure.

Additionally, there are no vacancies and have not been any opportunities to let space here for a number of years, restricting possibilities to establish a business here.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Grand Hotel Buildings (Meads)

Introduction/ Context

Grand Hotel Buildings (Meads) is a linear retail parade along Compton Street, approximately 0.6 miles south west of the centre of Eastbourne Town Centre. It is situated in one of Eastbourne’s foremost cultural centres, in close proximity to – most notably – both the Towner Art Gallery and Devonshire Park Theatre. The centre comprises 13 retail units within the rear of the Grand Hotel building, and the Eastbourne Core Strategy Local Plan (2013) Policy D4 defines it as a local centre.

Figure 74 – Grand Hotel Buildings (Meads)



Diversity of Uses & Vacancy Levels

The majority of uses within this centre are comparison; this comprises a mix of high-end shops such as jewellers, art galleries and sales, and premium gift shops. As with the comparison uses, the convenience uses are high-end independents such as delicatessens. The single leisure use is a small café.

Figure 75 – Grand Hotel Buildings (Meads)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 6 | 46% |
| Convenience | 3 | 23% |
| Retail Services | 1 | 8% |
| Leisure | 1 | 8% |
| Financial & Business Services | 0 | 0% |
| Vacant | 2 | 15% |

There are two vacancies within this centre as at the date of our site visit, and based on our research it appears that there has historically been a consistent vacancy rate at a similar level.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents at the Grand Hotel Buildings centre are at c. £19.40 psf. This is similar to the majority of Eastbourne centres assessed in this report, and indicates that the centre is relatively healthy and performing well from a commercial perspective.

Retailer Representation & Demand

The Grand Hotel Buildings centre comprises entirely small local businesses, with the exception of the two vacant units.

Customers' Experience & Behaviour

Due to the small size of the Grand Hotel Buildings centre, the presence nearby of a larger centre (Eastbourne Town Centre) that contains significantly more retail provision of all types, and given the specific nature of the retail offering in this location, comprising predominantly premium businesses, this location does not appear in the household survey responses with any frequency.

Accessibility

This centre is a short walk from Eastbourne Town Centre and has a small amount of on street parking. The 3 and 4 buses stop directly outside the retail parade, providing services from Meads, through Eastbourne Town Centre and to Hampden Park, and between Meads and Old Town respectively.

Environmental Quality

The environmental quality of this centre is generally very high. The Grand Hotel is a very impressive building architecturally, and the shops sitting on the retail parade within the building have generally high quality facades that are well-maintained, including a number of the units having matching awnings. The road is quiet, the pavement is wide, and there is some on street planting enhancing the environment further.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the centre was that it is safe.

Figure 76 – Monthly Crime Rate: Grand Hotel Buildings (Meads)

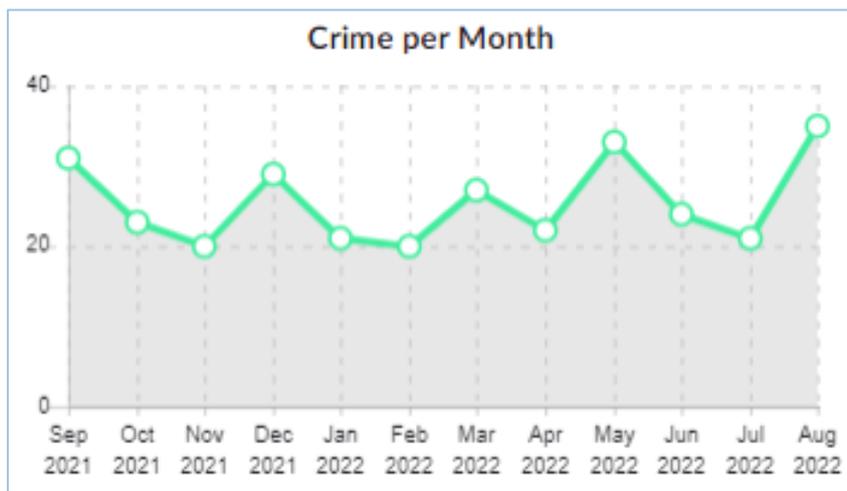


Figure 76 shows the monthly crime rate for the past 12 months for the Lower Meads area. The monthly crime statistics, which are broadly aligned with the majority of centres assessed within this report, verify our conclusion that this is a generally safe centre.

Opening Hours & the Evening Economy

Most of this centre's shops and services are open throughout the week during regular opening hours. There is almost no evening economy in this centre beyond these hours.

Barriers to Business Investment

Given this centre is very close to the principal shopping centre in the region – Eastbourne Town Centre – there is a significant amount of competition for customers nearby, which effectively relegates this centre to being “secondary”, which will likely deter some prospective businesses from this location.

The “unique selling point” offered by this location to draw customers is a premium offering from the retailers that is appropriate given both the aesthetic setting of the centre as well as its situation near both a premium hotel and several cultural institutions. This premium offering may restrict the number of businesses that may consider this to be an appropriate location.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

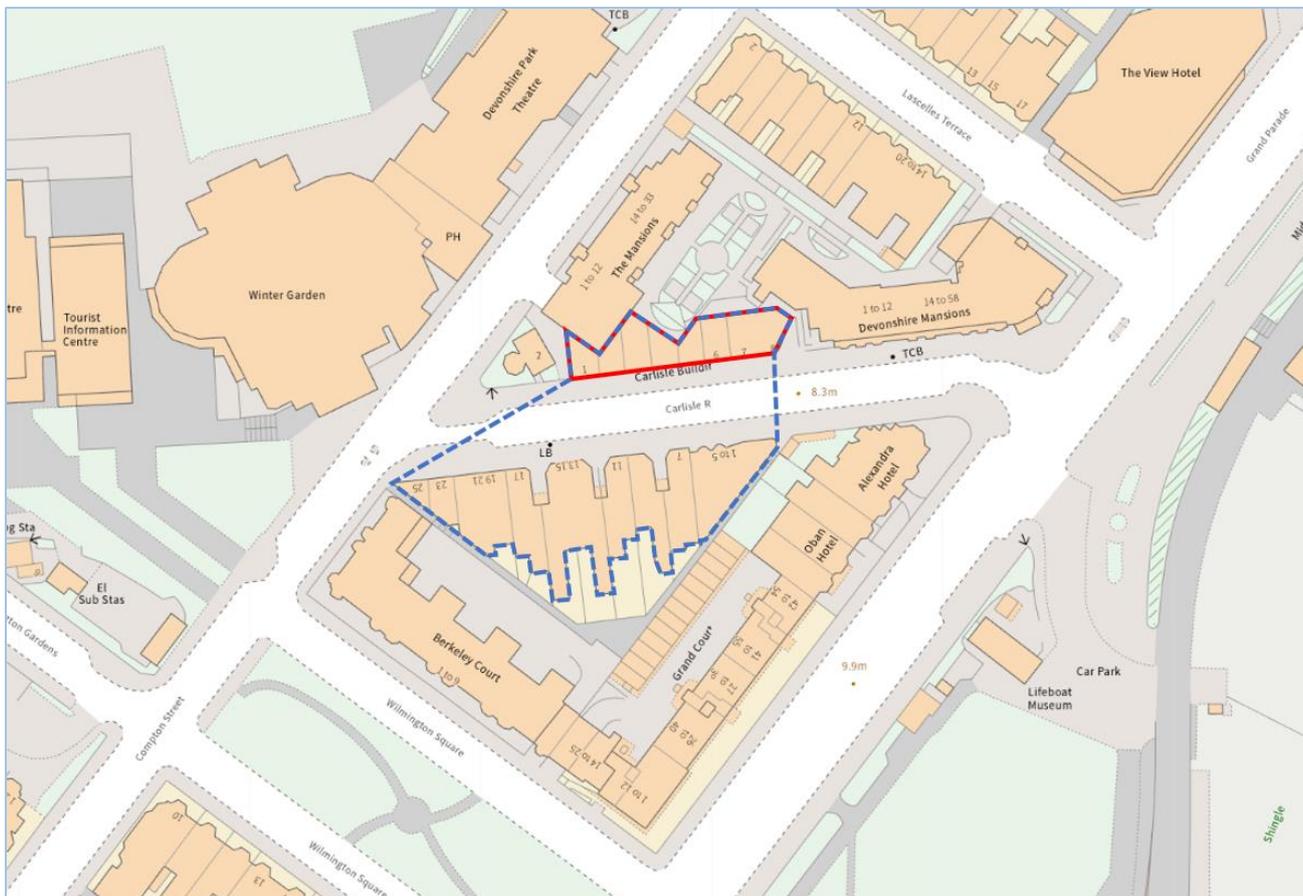
There is an outstanding planning application just outside the centre for a temporary observation wheel – the Western Wheel – and accompanying trampoline facilities to be constructed on an annual basis on Western Lawns. News reports suggest this observation wheel saw a large influx of users, which likely increased the footfall around this centre.

Carlisle Road (Meads)

Introduction/ Context

Carlisle Road (Meads) is a short retail parade along Carlisle Road between the seafront and Eastbourne Theatre, approximately 0.5 miles south of Eastbourne Town Centre, it is defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4 as a local centre.

Figure 77 – Carlisle Road (Meads) With Annotated Proposed Changes to Boundary



Carlisle Road is situated in one of Eastbourne’s foremost cultural centres, directly alongside both the Towner Art Gallery and Devonshire Park Theatre. We recommend a change in boundary as depicted in figure 77 as there is an equal amount of retail/ leisure opposite the existing town centre boundary that was not previously included. The centre’s existing boundary comprises seven retail units, and when the parade of shops opposite is included, there is a total of 17 retail units.

Diversity of Uses & Vacancy Levels

The summary table below includes both the existing and proposed retail parades and – as this centre is not available on GOAD – is undertaken on a per unit rather than a floor area basis, however the majority of units are relatively similar in size meaning undertaking the analysis on this basis will provide similar results.

Figure 78 – Carlisle Road (Meads)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 3 | 18% |
| Convenience | 3 | 18% |
| Retail Services | 3 | 18% |
| Leisure | 8 | 47% |
| Financial & Business Services | 0 | 0% |
| Vacant | 0 | 0% |

The existing centre comprises seven units including a café, restaurant, a beauticians, furniture shop, designer clothes shop, greengrocers and a newsagents. The additional retail parade we propose including comprises six further restaurants, cafes and takeaways across eight units, and one further business – a care home office – across the remaining two units.

There are no vacancies within either boundary allocation, and historically when businesses have vacated space in this centre they have been quickly replaced, meaning vacancy rates have consistently remained very low.

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Carlisle Road (Meads) are at c. £20.50 psf. This is at the upper end of the average rent across the majority of Eastbourne centres assessed in this report, and indicates that the centre is healthy and performing well from a commercial perspective.

Retailer Representation & Demand

As with the Grand Hotel Buildings centre assessed above, this centre comprises entirely independent businesses, although in this instance these are predominantly cafes and restaurants.

Customers’ Experience & Behaviour

Due to the small size of the Carlisle Road (Meads) centre, the presence nearby of a larger centre (Eastbourne Town Centre) that contains significantly more retail provision of all types, this location does not appear in the household survey responses with any frequency.

Accessibility

This centre is a short walk from Eastbourne Town Centre and has a small amount of on street parking. The 3 and 4 buses stop directly outside the retail parade, providing services from Meads, through Eastbourne Town Centre and to Hampden Park, and between Meads and Old Town respectively.

Environmental Quality

This centre contains a number of high quality, well maintained attractive period retail properties just outside of the Eastbourne Town Centre boundary. There are period appropriate street lights which are a subtle environmental enhancement to the street.

The street itself is quiet with minimal road traffic, and has views of the sea towards its south eastern end. Several of the businesses have outdoor seating which was well used on the date of our visit. Other street furniture allowing people to remain in the area when not within shops is limited, but there is public green space by the waterfront.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a very safe centre as it was quiet but well used on our visit.

Figure 79 – Monthly Crime Rate: Town Centre (Eastbourne)

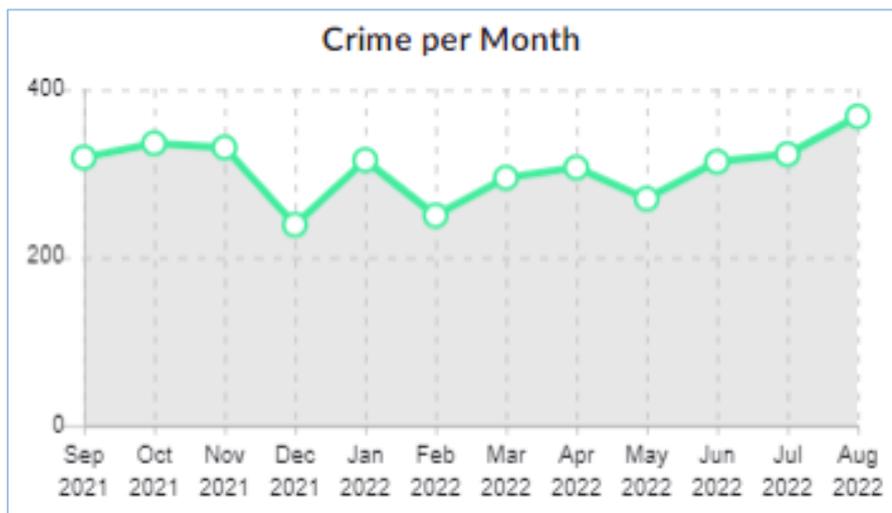


Figure 79 shows the monthly crime rate for the past 12 months for the Town Centre (Eastbourne) area – which includes this centre – sourced from the East Sussex Police website.

We would note that this is likely unrepresentative of this centre specifically as it is on the outer boundary of the Town Centre, in a less busy area. For example, note the significant drop off in monthly crimes two roads west in the Lower Meads area in Figure 76 within our assessment of the Grand Hotel Buildings centre, above.

Opening Hours & the Evening Economy

A significant proportion of the properties in this centre are leisure, and these uses typically close between 21:00 and 22:00, thus contributing to the evening economy in isolation as leisure businesses in their own right, and also by serving the local cultural institutions, keeping people visiting those locations in the centre. The non-leisure uses within this centre are open throughout the week during regular opening hours.

Barriers to Business Investment

Given this centre is very close to the principal shopping centre in the region – Eastbourne Town Centre – there is a significant amount of competition for customers nearby. The “unique selling point” offered by this location to draw customers is the concentration of high quality leisure uses serving in particular the cultural centre around the Theatres and Towner Gallery. This likely limits the types of appropriate businesses for this location.

Clearly the other main consideration is the low vacancy rate and rapid turnaround when units become available, suggesting a competitive letting environment that will make it difficult for businesses to move to this centre.

Additionally much like the Grand Hotel centre above, and as made clear by the household survey, this is effectively a secondary centre, which will likely limit the number of prospective customers in the location.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, although a small residential development was undertaken to the rear of the retail units in 2015 resulting in 4 additional flats, but whilst retaining the majority of the floor area of the retail unit. It is our understanding that there are no proposals for additional investment or development in the near future.

St Anthony's (Winston Crescent, Including Lidl)

Introduction/ Context

St Anthony's (Winston Crescent, Including Lidl), referred to hereinafter as St Anthony's or the centre, is defined within the Eastbourne Core Strategy Local Plan (2013) Policy D4 as a local centre, that comprises twelve retail units.

The majority of the centre is situated on a small crescent away from Seaside/ St Anthony's Avenue, which is a main road running south west to north east outwards from Eastbourne town centre. This crescent is exclusively used for either vehicular access or parking for the centre, or access to the Tollgate Community Junior School behind the centre.

The remainder of the centre is a single Lidl with a large, dedicated off-street car park to the north of the crescent.

Diversity of Uses & Vacancy Levels

The majority of shops within this centre are smaller, independent businesses, with the exception of a One Stop convenience store that occupies two units, and the Lidl Supermarket.

The majority of the remaining units are relatively varied for a small centre, including several cafes, a post office, two health and beauty services, a car parts shop, a vape shop and a dry cleaners.

There are currently no vacant units in this centre, and there have not been in at least ten years, although in that time one unit has been vacated and re-let.

Figure 80 – St Anthony's (Winston Crescent)

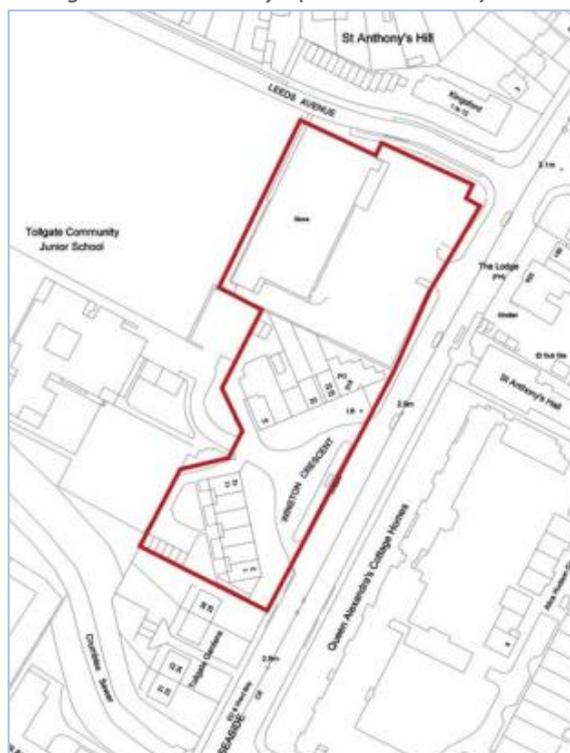


Figure 81 – St Anthony's (Winston Crescent, Including Lidl)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 0 | 0% |
| Convenience | 3 | 25% |
| Retail Services | 6 | 50% |
| Leisure | 2 | 17% |
| Financial & Business Services | 1 | 8% |
| Vacant | 0 | 0% |

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Carlisle Road (Meads) are at c. £19.30 psf. This is similar to the majority of Eastbourne centres assessed in this report, and indicates that the centre is relatively healthy and performing well from a commercial perspective.

Retailer Representation & Demand

St Anthony's (Winston Crescent) centre comprises twelve retail units. One of the retailers operating from this centre, Lidl, is a large multiple food store, and a further one – One Stop – is a smaller multiple convenience retailer. The remaining operators in this centre are predominantly local independent businesses.

Customers' Experience & Behaviour

The household survey paints a picture of a centre that is used by a small proportion of the population of Eastbourne as the principal location at which to do their main food and grocery shop, specifically at the Lidl, which 25 respondents or 1.7% of the total respondents use for their main shop. Beyond groceries/ convenience shopping, very few respondents cite St Anthony's as being their primary shopping location.

Accessibility

This centre is easily accessible by car due to its proximity to a main road. However at the time of our visit, the on-street parking within the crescent was almost full; should this be full, there is limited local on street parking elsewhere, and the parking outside of the Lidl is customer-only, significantly reducing the ease of access.

There is a bus stop directly outside the centre, which is served by the 1 and 5 buses. Walking is likely difficult due to the large roads surrounding the centre and the suburban/ industrial composition of the local area.

Environmental Quality

The environmental quality of this centre is compromised by its situation on a main road and next to a very large industrial estate/ retail park. The Lidl is quite modern, but as with the crescent the front of the store is dominated by hard standing/ parking.

Perception of Safety

The area surrounding the centre was quite busy with pedestrians, people waiting at the bus stop, and people waiting in their cars in the car park, so it felt busy and not particularly unsafe. However, on our visit we were approached several times by individuals while trying to conduct our health checks.

Figure 82 – Monthly Crime Rate: St Anthony's and Langney Point



Figure 82 shows the monthly crime rate for the past 12 months for the St Anthony's and Langney Point area, which does not show an abnormally high level of crime compared with the other centres of a similar size assessed within this report.

Opening Hours & the Evening Economy

The majority of the businesses in this centre are open throughout the week during regular opening hours. The Lidl is open from 8:00 until 22:00 during the week and Saturdays, the Post Office is open until 18:00 every day but Sunday, and the One Stop is open 6:00 until 22:00 daily.

Barriers to Business Investment

The main issues for this centre regarding opportunities for business investment result from the significant pressure from the retail centres and large retail parks nearby. There is a variety of large shops including a very large Tesco and a number of large comparison retailers.

Furthermore, as described above this is not an attractive setting, which in particular combined with its proximity to large retailers will likely make it a challenging location in which to start a business.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

Cavendish Place (Town Centre)

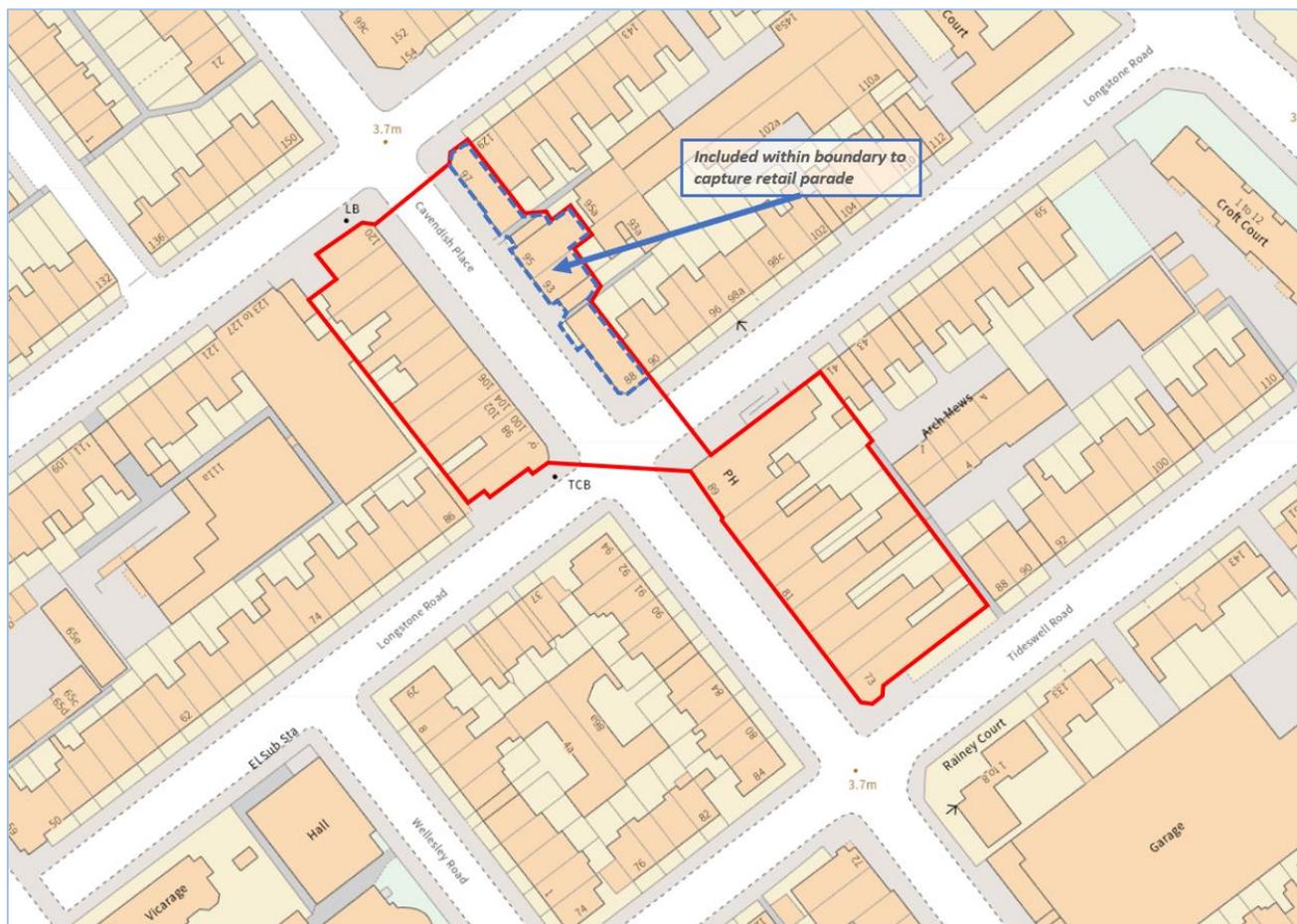
Introduction/ Context

Cavendish Place is defined as a local centre within the Eastbourne Core Strategy Local Plan (2013) Policy D4. It currently sits within the boundary of the Eastbourne Town Centre.

The centre comprises two separate boundaries, surrounding the western retail between Ashford Road and Longstone Road, and the eastern retail between Longstone Road and Tideswell Road. As there is retail on both sides of the road between Ashford and Longstone roads, we consider it appropriate for the western side of the road on this block to be included within this centre, which has been depicted in figure 83.

The previous boundary contained 20 shops, and our recommended boundary changes add a further four units. Whilst this centre is within the boundary of Eastbourne Town Centre, it is clearly a distinct centre in its own right as there is clear separation created by several residential roads between it and Eastbourne’s retail provision.

Figure 83 – Cavendish Place (Town Centre)



Diversity of Uses & Vacancy Levels

This centre’s provision is relatively diverse given its small size and proximity to larger centres. It contains a relatively even mix of comparison, convenience, retail services and leisure uses, with those shops generally clearly set up to serve the local community rather than to attract customers from Eastbourne town centre; the units are small, the retailers are predominantly independent.

The vacancy rate has been assessed on a per-unit basis, and is lower than the PROMIS 200 centre average vacancy rate.

Figure 84 – Cavendish Place (Town Centre)

| Use Categories | Units (Count) | Units (%) |
|-------------------------------|---------------|-----------|
| Comparison | 5 | 21% |
| Convenience | 3 | 13% |
| Retail Services | 6 | 25% |
| Leisure | 5 | 21% |
| Financial & Business Services | 3 | 13% |
| Vacant | 2 | 8% |

Commercial Rents

Coupled with the other town centre performance metrics included within this report, the level of rent which occupiers are prepared to pay for commercial space in a centre is a good indication of the strength of that centre.

Based on Costar data, market rents for Cavendish Place (Town Centre) are at c. £18.00 psf. This is lower than the average rents within this report, which generally sit between £19.00 and £21.00 psf, indicating this centre slightly less desirable to prospective tenants relative to other Eastbourne centres.

Retailer Representation & Demand

Cavendish Place (Town Centre) centre contains 20 retail units. All the retailers in this centre are small, independent businesses and there are no national multiples.

Customers' Experience & Behaviour

Due to the small size of Cavendish Place (Town Centre) and the presence nearby of a large centre (Eastbourne Town Centre) that contains significantly more retail provision of all types, this location does not appear in the household survey responses with any frequency.

Accessibility

The accessibility to this centre is high due to its very central location. It is accessible by car – albeit there is only on-street parking nearby, on foot, and a bus service runs through from the town centre.

Environmental Quality

This centre's retail units are mostly maintained to a fair standard, but generally look quite tired. There is little greenery on the street, and a number of businesses had their bins on the pavement which significantly detracts from the overall perception of the centre. The pavement is quite narrow and the road, whilst not excessively busy at the time of our visit, has a significant influence on the experience of walking along the street as a result of this narrow pavement.

Perception of Safety

We identified no significant adverse issues with regards to safety or security during our inspections, which were conducted during the day, and our perception of the town centre was that this is a safe centre.

Figure 85 – Monthly Crime Rate: Cavendish Place (Town Centre)

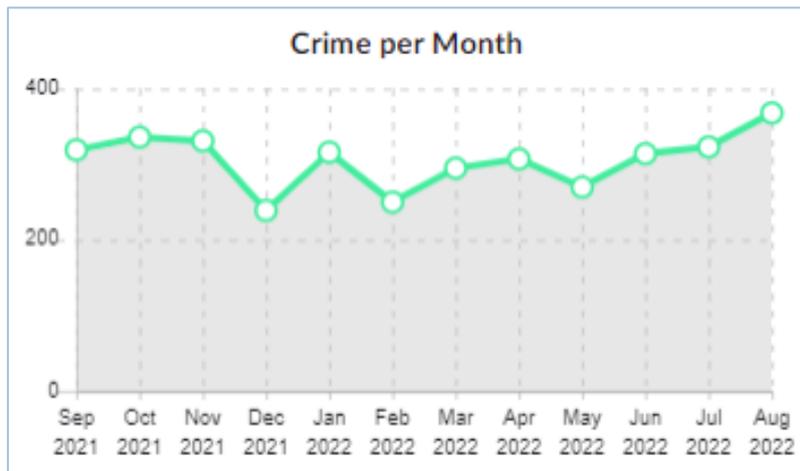


Figure 85 shows the monthly crime rate for the past 12 months for the Town Centre (Eastbourne) area – which includes this centre – sourced from the East Sussex Police website.

We would note that this is likely unrepresentative of this centre specifically as it is on the outer boundary of the Town Centre, in a less busy area. The street itself is clear and open, predominantly bound by residential on the town centre edge, and at the time of our visit was quite quiet, unlike the town centre which contains a significantly higher concentration of people.

Opening Hours & the Evening Economy

The majority of the businesses in this centre are open throughout the week during regular opening hours. There are also numerous takeaways that are open late (22:00 – later) throughout the week, and a pub that closes daily at 23:00, and at midnight on Saturdays.

Barriers to Business Investment

The low vacancy rate in the centre means there are few opportunities for new businesses to move here, and there is virtually no opportunity to develop new space due to the residential surrounds. Additionally, this is very much a local centre and therefore it mostly serves the nearby residential streets – this limits the number of potential customers and creates a theoretical cap to the amount of space that can be supported in this location. Finally, and likely most importantly, the centre’s close proximity to Eastbourne Town Centre means there is a significant amount of comparison retail and large convenience retail within a short walking distance of this centre.

New Development & Investment Proposals

There have been no developments of scale in this centre in at least the last ten years, and it is our understanding that there are no proposals for additional investment or development in the near future.

5. RETAIL NEEDS: APPROACH & BASELINE EVIDENCE

In this section, we outline our approach to retail capacity forecasting. We then set out the baseline assumptions and forecasts underpinning the assessment of new retail (convenience and comparison goods) floorspace capacity in Eastbourne Borough over the plan period.

Approach

Our assessment uses an Excel-based retail capacity model, applying the most up-to-date baseline evidence available including a new household telephone survey conducted by NEMS Market Research in March/April 2022.

This Study has been prepared in parallel with the [Lewes District Retail and Leisure Study 2022] as part of a joint commission from Lewes and Eastbourne Councils. It has therefore been possible, and more cost-effective, to design a household telephone survey covering the catchment area of the shopping destinations in both Lewes District and Eastbourne Borough.

Accordingly, and consistent with good retail planning practice, we forecast the expenditure-based capacity for new retail floorspace as follows:

- define an appropriate catchment area for Eastbourne Borough (and Lewes District), sub-divided into 15 zones based on postcode sectors;
- calculate the total amount of convenience and comparison goods expenditure available within each of the 15 zones comprising the catchment area, at the base and forecasting years (as defined below);
- allocate the available expenditure to the Borough's shopping destinations based on the results of the 2022 household telephone survey to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission and/or under construction) in the Borough's shopping destinations and assess their likely turnover contribution to future sales; and
- compare the estimated sales in the Borough's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional convenience and/or comparison goods floorspace (after allowing for any committed developments).

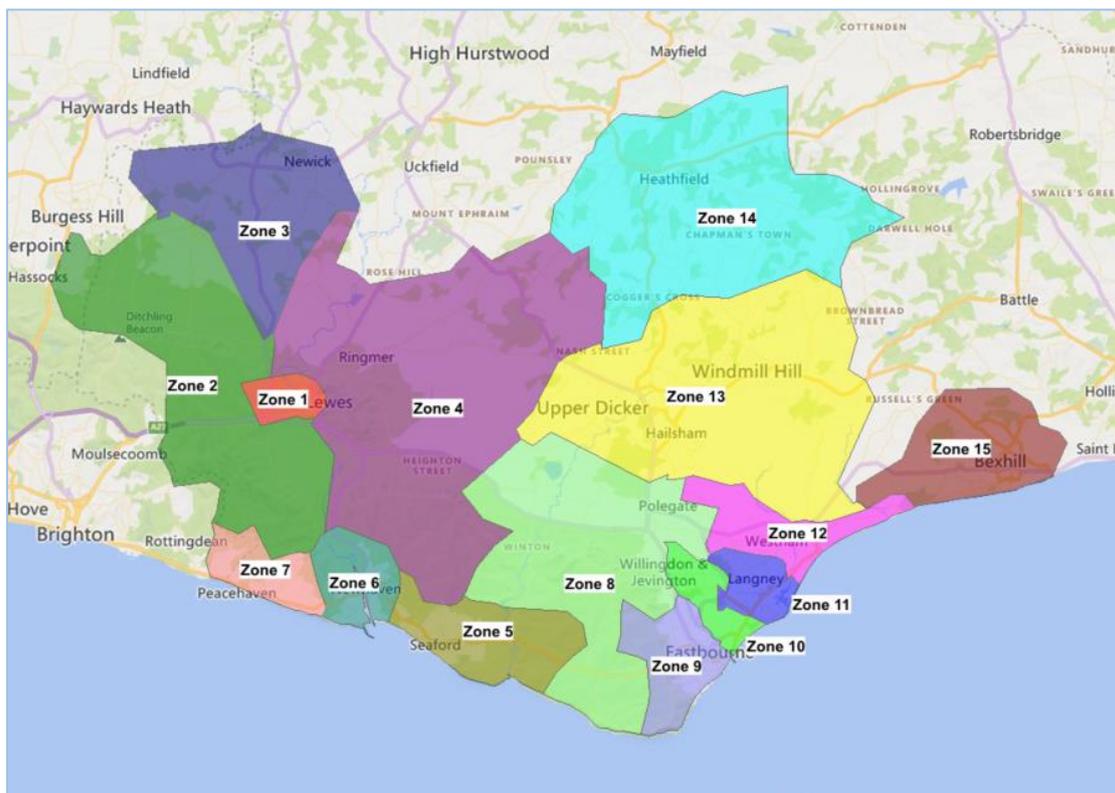
We set out below further details relating to the scope and format of the quantitative retail needs assessment.

Catchment Area

For this Study (and the [Lewes District Retail and Leisure Study 2022] being prepared in parallel) we have defined a realistic and sufficiently wide catchment area from where the main centres and other shopping destinations 'capture' a substantial proportion of their turnover.

The catchment area has been separated into 15 zones, as shown in Figure 86 below. A larger map is included at Appendix i.

Figure 86 – Map of the catchment area



The catchment area zones are based on postcode geography and extend beyond the administrative boundaries of Lewes District and Eastbourne Borough to reflect shopping patterns and expenditure flows. Our starting point for defining this catchment area was the Lewes District Shopping and Town Centres Study 2012 and the Eastbourne Borough Shopping Assessment 2010. The catchment areas used in those studies overlapped and we consolidated some zones (where appropriate) to define a total of 15 zones for this Study.

The catchment area sets the sampling framework for the new household telephone survey, which provides a baseline picture of the market shares and turnovers of the Borough’s shopping destinations in 2022. More information on the household telephone survey is included in the Baseline Evidence (Household Telephone Survey of Shopping Patterns) section on pp. 88.

Shopping Destinations and Scenarios Modelled

The shopping destinations in Eastbourne Borough modelled are:

- Eastbourne Town Centre;
- District Shopping Centres in Eastbourne Borough (as a group);
- Local & Neighbourhood Shopping Centres in Eastbourne Borough (as a group); and
- Non-central stores in Eastbourne Borough (as a group).

We assess the ‘baseline’ scenario for new retail floorspace in the Borough, in which we assume that the 2022 pattern of market shares of convenience and comparison goods expenditure in each of the Borough’s shopping destinations – as indicated by the new household telephone survey – remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace (or ‘lost’ retail floorspace e.g. through redevelopment and/or change of use to non-retail), either within or outside the Borough, would not change the market shares of expenditure attracted from the catchment area. This ‘constant market share’ approach is widely used and accepted for strategic retail capacity forecasting.

Whilst we have prepared capacity forecasts for both convenience and comparison goods floorspace in Eastbourne Town Centre and the District Shopping Centres, as well as for Non-central stores in Eastbourne Borough, we have prepared forecasts for convenience goods floorspace only in the Local & Neighbourhood Shopping Centres. This is because these centres are not ‘main’ destinations for comparison goods expenditure and thus do not feature notably in the results of

the household telephone survey. As such, there is a lack of reliable data on the market shares of comparison goods expenditure which they attract. The absence of capacity forecasts for comparison goods floorspace in these smaller centres is, in our view, of little consequence for the emerging Local Plan.

Base and Forecasting Years

We have used 2022 as the base year for our retail capacity forecasts. The model therefore provides estimates of current sales in each of the Borough's shopping destinations as at 2022.

As agreed with the Council, we have prepared capacity forecasts at 2025, 2030, 2035 and 2040 (so as to cover the forthcoming plan period).

Limitations of Retail Capacity Forecasting

It is important to note that the retail capacity forecasts serve only as a guide for future planning policies, development strategies and/or decisions on planning applications. They are not prescriptive and the further ahead the forecasting year, the less certain the forecasts. Accordingly, the Council should be aware that capacity forecasts beyond five years should be treated with a degree of caution, as they are based on various assumptions and forecasts that can and will change. Forecasting accuracy, even over the next five years, is further uncertain due to challenging macro-economic conditions.

We would also note that some of the Borough's existing centres are relatively small and are not main destinations for shopping, and thus do not feature notably in the results of the household telephone survey. As such, whilst we have sought to prepare retail capacity forecasts for the smaller centres, the inevitable lack of 'full' market share data is a limitation.

Format of the Retail Capacity Tables

In the remainder of this section, all references to Tables are those comprising our up-to-date assessment of new retail floorspace capacity set out at Appendix ii:

- Tables 1 to 5 show the population and expenditure forecasts for the catchment area;
- Tables 6A to 13A are the tables for Eastbourne Town Centre. Tables 6A and 7A indicate the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the 2022 household telephone survey. Table 8A provides an overview of the pattern of market shares for Eastbourne Town Centre. Table 9A is the product of Tables 5A and 7A, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10A sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11A accounts for the sales capacity of existing main foodstores and other convenience goods shops in the Town Centre, and Table 12A sets out any committed retail developments and their expected sales levels (for both convenience and comparison goods). Table 13A brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Eastbourne Town Centre. It also shows the overall market shares of catchment area expenditure on convenience and comparison goods attracted by the Town Centre.
- Tables 14A to 22A are the tables for District Shopping Centres in Eastbourne Borough. These tables follow the same arrangement as the tables for Eastbourne Town Centre; however, an additional table is included (Table 20A) indicating 'benchmark' comparison goods sales in the existing retail warehouses and foodstores.
- The arrangement for Local & Neighbourhood Shopping Centres in Eastbourne Borough (comprising Tables 23A to 28A) is slightly different given we have prepared forecasts for convenience goods floorspace only. Tables 23A and 24A indicate the survey-derived pattern of market shares of expenditure attracted from the catchment area. Table 25A shows forecast convenience goods sales, on a zone-by-zone basis and overall. Table 26A sets out the sales capacity of existing main foodstores and other convenience goods shops, and Table 27A accounts for any committed retail developments. Table 28A brings together the expenditure attracted, existing floorspace and any commitments to arrive at the capacity forecasts for the Local & Neighbourhood Shopping Centres (as a group).
- Tables 29A to 37A relate to Non-central stores in Eastbourne Borough. These tables follow the same arrangement as the tables for the District Shopping Centres described above.

Baseline Evidence

Household Telephone Survey of Shopping Patterns

As set out above, we designed and commissioned a new household telephone survey of shopping patterns in the catchment area – the results of which are included at Appendix iii. It covered the area shown on the map at Appendix i which was divided into the 15 catchment zones identified.

A total of 1,500 telephone interviews were conducted by NEMS in March/April 2022. These interviews were distributed across the 15 catchment zones (with 100 interviews undertaken in each zone).

The survey asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods) shopping. The survey also asked questions about households' shopping habits for 8 different sub-categories of comparison goods shopping (these sub-categories are closely matched with the widely recognised retail expenditure categories to ensure compatibility with the retail capacity model). We combined the results of Questions 15 to 22 of the household telephone survey to provide weighted average market shares of all comparison goods expenditure attracted to each of the Borough's shopping destinations, using weights according to the amount of expenditure on each of these 8 sub-categories of comparison goods shopping. These are set out in Table 4 (bottom row) of the model at Appendix ii.

Market Share Adjustments

The household telephone survey provides a detailed picture of where households in each of the 15 catchment zones do 'most of' their shopping for convenience goods and the 8 different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical within the limitations of the sample to accurately quantify how much households spend on convenience goods and the various categories of comparison goods, and where and how often. Shopping patterns are too dynamic and unpredictable. Therefore, the results of the household telephone survey do not directly indicate actual expenditure flows but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations.

However, like all such surveys, this means that its results cannot be applied uncritically in the model. Thus for example, such surveys (undertaken by ourselves and by other consultants) often tend to over-emphasise shopping in larger centres and stores, and under-represent it in small centres. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres.

It is also sometimes the case, in our experience, that convenience goods shopping is under-represented in those larger centres which are principally comparison goods shopping destinations.

It can therefore be necessary to make market share adjustments, or 'correction' factors, so as to transfer expenditure in the model from one or more locations to others, to balance (or calibrate) the model and make it represent reality more accurately based on our professional judgements. This is not uncommon and has been necessary in the case of convenience goods shopping in Eastbourne Town Centre.

To that end, we consider using of the convenience goods market shares from the household telephone survey without correction would generate an unrealistically low sales density (of about £5,300 per sqm net in 2022) for the Town Centre, considering its size and line-up of convenience goods shops and stores including Sainsbury's, M&S Foodhall and two Tesco Express stores. We have therefore increased the survey-indicated market shares by the correction factor of 120% (i.e. we have increased them by 20% from the no-change default factor of 100%) resulting in a more realistic average sales density of about £6,500 per sqm net in 2022. This compares with an estimated 'benchmark' convenience goods sales density of £7,637 per sqm net (as indicated in Table 11A at Appendix [x]), with any under-trading likely to be attributable to the significant choice of main foodstores elsewhere in the Borough as opposed to deficiencies with existing provision in Eastbourne Town Centre.

We further assess that a comparison goods market share adjustment is necessary in respect of District Shopping Centres in Eastbourne Borough. Noting the limitations of household telephone surveys and capacity forecasting in smaller centres, we have increased the survey-indicated comparison goods market shares by the correction factor of 200%. This results in an average sales density in the District Shopping Centres of about £4,396 per sqm net in 2022, which we consider is more realistic (relative to the survey-derived comparison goods sales density of £2,158 per sqm net).

Catchment Population

The starting point for the population forecasts is a report, dated March 2022, commissioned from Precisely (formerly Pitney Bowes) on the current and projected future population of each catchment zone. The report is based on 2011 Census and mid-year population estimates derived from Office of National Statistics (ONS) data.

The result is that, for the catchment area as a whole, the population is expected to increase from 355,545 in 2022 to 400,272 by 2040 (representing an increase of about 12.5%).

Per Capita Expenditure

The report commissioned from Precisely sets out estimated average per capita expenditure on convenience and comparison goods in each catchment zone. The estimates and forecasts included within the report take account of differences in average per capita expenditure on comparison and convenience goods from zone to zone; and are therefore expected to be more reliable than relying on national forecasts.

We have applied these estimates and forecasts of per capita expenditure on both comparison and convenience goods, including expenditure on Special Forms of Trading (SFT), within the top half of Table 2 at Appendix ii.

Special Forms of Trading

We have made deductions from the per capita expenditure figures supplied by Precisely to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.

We have applied an SFT deduction of 7% for convenience goods expenditure in 2022, increasing to 8.5% by 2040. Our SFT deductions for comparison goods expenditure are much greater; from 22.5% in 2022 to 30% by the end of the forecasting period.

These deductions are based on our professional judgements at this moment in time. Whilst the total volume of online retail sales is greater than the percentages assumed within the model, it is necessary to recognise that, with the growth of multi-channel retailing, physical stores can function as showrooms and a source of stock for online-based sales. Therefore, not all online retail sales are 'lost' from the turnover of physical stores and our SFT deductions seek to account for this.

Total Available Expenditure in the Catchment Area

The combined effect of the forecast growth in population and per capita expenditure (after deducting expenditure on SFT) is that we expect total catchment area expenditure on convenience goods to increase by about £30.8m (approximately 4%) over the period 2022 to 2040; as set out in Table 3 of the model.

For comparison goods, we expect total catchment area expenditure to increase by about £431m (approximately 33%) over the period 2022 to 2040. This compares with growth in the total catchment area population of around 12.5% over the period. Thus, only a relatively small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are particularly insensitive to population growth assumptions, principally because:

- Any population growth is likely to be only a small proportion of total catchment area population (and its available expenditure); and
- The expenditure arising from any population growth is likely to be attracted by a number of shopping destinations (as shopping patterns vary greatly), therefore having only a small effect on capacity forecasts in any individual centre.

The comparison goods floorspace capacity forecasts are much more sensitive to the assumptions about growth in per capita expenditure, however, especially in the later part of the forecasting period. This underlines the need to review the capacity forecasts at regular intervals over that period.

Visitor Expenditure

We have made allowances for visitor expenditure in Eastbourne Town Centre. Reflecting its role as a popular seaside/tourist destination, we assume the Town Centre is likely to attract some of its convenience and comparison goods sales from outside the catchment area (3% and 5% respectively).

We have made no such allowance for the other shopping destinations modelled, given that they are unlikely to secure substantial expenditure from outside the wide catchment area.

Existing Shop Floorspace

The existing shop floorspace in the Borough's shopping destinations is sourced from the most recent Experian Goad surveys (insofar as available). With regards to the smaller centres and some of the Non-central stores in Eastbourne Borough, floorspace data has been derived from Edozo Maps and our own desktop investigations.

Non-central stores in Eastbourne Borough are principally concentrated along Lottbridge Drove between Admiral Retail Park (to the south) and Hampden Park (to the north), close to the junction with the A22. The retail offer in these locations generally comprises 'bulky' comparison goods shopping and food/non-food superstores.

Committed Shop Floorspace

We have included in the model any substantial retail floorspace expected to come forward, or be released for non-retail uses, in the Borough.

Such commitments are limited to the change of use proposals at 82-86 Terminus Road in Eastbourne Town Centre (planning application ref. 190612), as identified in Table 12A of the model, with the resulting loss of retail floorspace accounted for in Table 13A.

We are aware that a planning application (ref. 220849) has been registered for a new Aldi foodstore at Sovereign Harbour; however, the capacity model does not account for this on the basis it does not represent a commitment.

Growth in Sales Densities

We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary. Our judgements in this respect take into consideration Precisely's Retail Expenditure Guide 2021/22 and Experian's Retail Planner Briefing Note.

We have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period.

6. RETAIL NEEDS: FORECASTS

Introduction

In this section, we set out and discuss the implications of the retail capacity forecasts for Eastbourne Borough over the period to 2040. We have prepared forecasts for the following shopping destinations:

- Eastbourne Town Centre;
- District Shopping Centres in Eastbourne Borough (as a group);
- Local & Neighbourhood Shopping Centres in Eastbourne Borough (as a group); and
- Non-central stores in Eastbourne Borough (as a group).

In setting out our forecasts, we distinguish between convenience goods and comparison goods, defined as follows:

- **Convenience goods:** Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.
- **Comparison goods:** Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

As outlined in section 5, our forecasts represent the 'baseline' scenario for new retail floorspace, in which we assume that the 2022 pattern of market shares of convenience and comparison goods expenditure (as indicated by the new household telephone survey) remains unchanged throughout the forecasting period – notwithstanding the potential impact of any new or replacement retail development and/or any existing shop floorspace 'lost' to alternative uses.

Convenience Goods Floorspace

Our forecasts in respect of the need for new convenience goods floorspace in the Borough are summarised in Figure 87 below.

Before we comment on the capacity forecasts, we would note that the forecasts are on the assumption that, where existing foodstores and other convenience goods floorspace is shown in the model to be trading above average benchmark levels, the sales density will fall to that benchmark level from 2025 onwards. In reality, however, some stores may continue to trade above (or below) average benchmark levels.

The forecasts are also on the assumption that potential new convenience goods floorspace would be delivered in the form of a new foodstore(s) trading at a 'generic' average sales density of £11,500 per sqm net. Some operators would trade above this level whilst other foodstores (and convenience goods shops) would trade below. Therefore, the format in which new convenience goods floorspace is provided will affect the amount of such floorspace that can be supported in terms of expenditure-based capacity.

Figure 87 – Summary of capacity forecasts: convenience goods (sqm net sales area)

| | 2025 | 2030 | 2035 | 2040 | Table number (Appendix ii) |
|--|---------------|-------------|------------|------------|-------------------------------|
| Eastbourne Town Centre | -800 | -650 | -550 | -550 | 13A |
| District Shopping Centres in Eastbourne Borough | -700 | -400 | -300 | -250 | 22A |
| Local & Neighbourhood Shopping Centres in Eastbourne Borough | 350 | 450 | 500 | 500 | 28A |
| Non-central stores in Eastbourne Borough | 0 | 400 | 600 | 700 | 37A |
| Combined forecasts for Eastbourne Borough | -1,150 | -200 | 250 | 400 | |

Notes:

- a) *The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.*
- b) *Forecasts rounded to the nearest 50 sqm net.*

Figure 87 shows that there will be a limited theoretical over-supply of convenience goods floorspace in both Eastbourne Town Centre and the Borough’s District Shopping Centres from 2025 onwards.

The other shopping destinations modelled have limited capacity for additional convenience goods floorspace. Local & Neighbourhood Shopping Centres in Eastbourne Borough should be able to support a combined total of approximately 350 sqm net sales area in 2025, rising to about 500 sqm net sales area by the end of the plan period; while Non-central stores in Eastbourne Borough have the potential to support about 700 sqm net sales area by 2040.

The overall (i.e. combined) capacity forecasts identified above are the sum of our individual forecasts for the Borough’s shopping destinations, rising from ‘negative’ capacity in 2025 to about 400 sqm net sales area by the end of the plan period.

On this basis, there should be no requirement for the new Local Plan to allocate sites for new convenience goods floorspace. Rather, where limited expenditure-based capacity has been identified – noting that any capacity forecast as ‘non-central’ should be directed to town centres first in accordance with the sequential approach – this could support the improvement and/or replacement of existing foodstore provision. Alternatively, there is potential for some of the forecast capacity to be met organically through changes of use and/or repurposing.

Comparison Goods Floorspace

Our ‘baseline’ capacity forecasts for comparison goods floorspace in the Borough are summarised in Figure 88 below. These assume that any new comparison goods floorspace would trade at a ‘generic’ average sales density of £5,000 per sqm net (grown from 2022 in line with forecast growth in expenditure).

Figure 88 – Summary of capacity forecasts: comparison goods (sqm net sales area)

| | 2025 | 2030 | 2035 | 2040 | Table number (Appendix ii) |
|--|---------------|---------------|---------------|---------------|-------------------------------|
| Eastbourne Town Centre | -200 | -950 | -1,450 | -2,250 | 13A |
| District Shopping Centres in Eastbourne Borough | -3,350 | -3,650 | -3,850 | -4,150 | 22A |
| Non-central stores in Eastbourne Borough | -1,200 | -1,600 | -1,850 | -2,200 | 37A |
| Combined forecasts for Eastbourne Borough | -4,750 | -6,200 | -7,150 | -8,600 | |

Notes:

- a) *The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.*
- b) *Forecasts rounded to the nearest 50 sqm net.*
- c) *Local & Neighbourhood Shopping Centres in Eastbourne Borough not modelled.*

The capacity forecasts indicate that, after allowing for existing comparison goods floorspace to become more efficient by 2% per annum, there will be a theoretical over-supply of such floorspace across Eastbourne Borough from 2025 onwards. It should be noted that this substantial ‘over-supply’ is additional to the quantum of existing vacant shop floorspace in the main centres identified in section 4 of this report.

Forecast over-supply is not uncommon for town centres in the face of slower growth in per capita comparison goods expenditure and the increasing volume of retail sales attributed to the internet, which is contributing towards reduced floorspace demand as retailers ‘right-size’ their store portfolios (as considered previously in section 3 of this report).

Indeed, planning permissions monitoring data provided by EBC (current as at 1st April 2022) highlights a trend of retail floorspace⁹ across the Borough – in excess of 3,000 sqm net – being released for alternative uses. Although it is likely that a proportion of this retail floorspace ‘to be lost’ would have been vacant or in a retail service use (i.e. not comparison goods floorspace), the data serves to indicate the increasing emphasis on and opportunities for rationalising and/or repurposing comparison goods floorspace in Eastbourne Borough¹⁰. The effects have informed our review of the Borough’s town centre boundaries and primary shopping areas in section 8 below. However, it is important to recognise that retail (notably comparison goods floorspace) over-supply and contraction does not necessarily justify the contraction of town centre boundaries. This is because main town centre uses, and Class E uses, (the distribution of which inform the definition of town centre boundaries) encompass a range of non-retail uses including commercial, business, leisure, community and service uses.

The retail capacity findings further point to the appropriateness of a more flexible policy response (for example, when controlling the proportion of retail uses within a centre and/or shopping frontage) as we consider in section 9 of this report.

⁹ Classified as ‘A1’ retail which is Class E(a) in the current Use Classes Order.

¹⁰ The ‘Windfall Assessment’ associated with the Council’s Land Availability Assessment (October 2022) predicts that, based on past trends for change of use from retail to residential, there could be a loss of around 16,500 sqm of retail floorspace over the period to 2039, with over half of this future loss focused on Eastbourne Town Centre.

7. COMMERCIAL LEISURE NEEDS ASSESSMENT

Introduction

Leisure uses and activities are an important part of successful town centres and can play a major role in attracting visitors, extending dwell times, and supporting the evening economy. Most leisure uses are therefore defined as main town centre uses in NPPF terms (although not all are included within Class E of the Use Classes Order, with the some being classified as 'sui generis' uses).

In this section, we identify the current supply of key leisure facilities in the Borough (by type and location) and assess whether there are any deficiencies or 'gaps' in the existing commercial leisure offer – with a particular focus on:

- i. eating and drinking out (i.e. food and beverage uses) comprising;
 - a. food and drink for consumption (mostly) on the premises – Class E(b)
 - b. public houses, wine bars or drinking establishments – sui generis
 - c. drinking establishments with expanded food provision – sui generis
 - d. hot food takeaways – sui generis
- ii. cinemas – sui generis;
- iii. bingo / casino facilities – sui generis;
- iv. ten-pin bowling – Class E(d);
- v. trampoline parks – Class E(d); and
- vi. gyms and health & fitness facilities – Class E(d).

The analysis follows our review of the leisure market context and trends at section 3 of this report in addition to our healthcheck assessments of the Borough's centres at section 4.

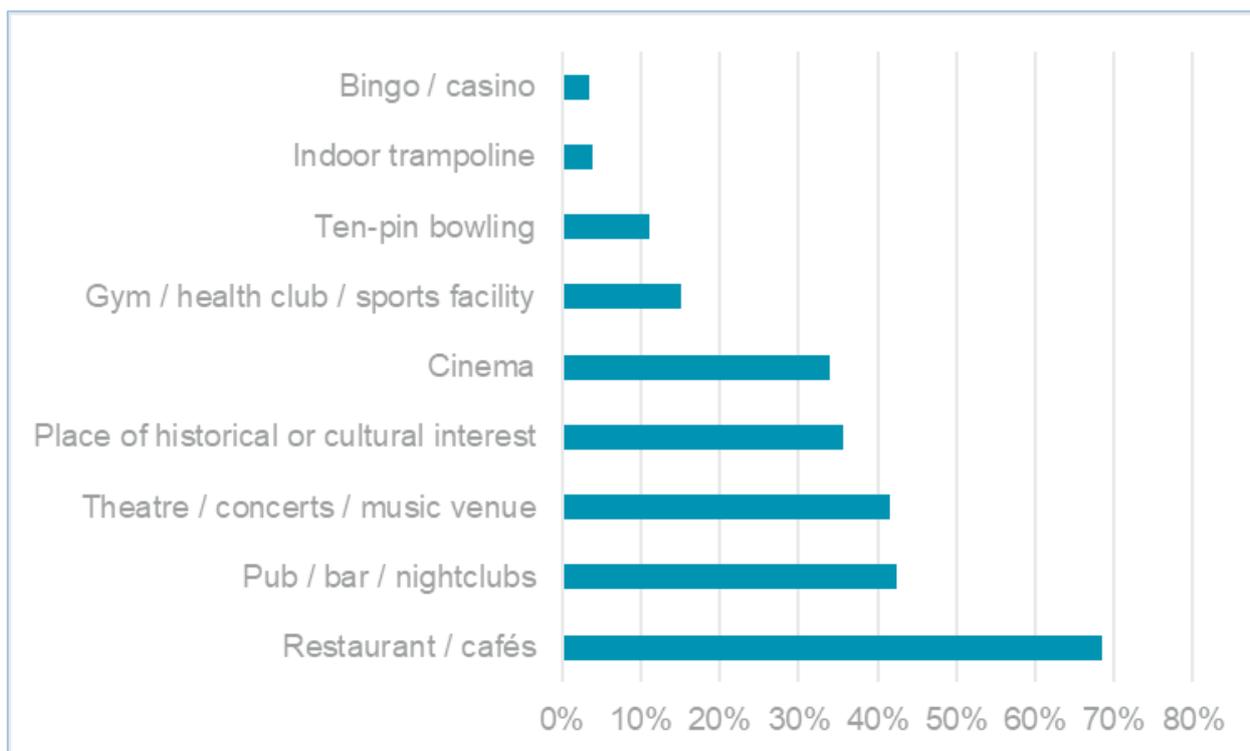
It should be noted that forecasting the need for commercial leisure provision is more problematic than for retailing. This is due to the unpredictable and highly elastic nature of leisure trips (and associated spending) in addition to a lack of reliable performance data. Consequently, there is no robust method for assessing commercial leisure needs in quantitative terms. Our review is therefore based on high level qualitative analysis informed by the following:

- the results of the 2022 household telephone survey;
- Experian Goad surveys; and
- desktop research and our own site inspections during [September and October 2022].

Participation Levels

Figure 89 below shows the level of participation in different types of leisure-based activities by respondents to the household telephone survey which, as described in section 5 of this report, is based on a catchment area comprising 15 zones (as shown on the map included at Appendix i).

Figure 89 – Participation in leisure-based activities across the catchment area



Source: Question 24 of household telephone survey (Appendix iii).

Notes: The 'Restaurant / cafes' response category does not explicitly include hot food takeaways although clearly some restaurants and cafes will offer a takeaway service.

As shown in Figure 89, the most popular activity relates to eating and drinking out, with almost 70% of respondents visiting restaurant/ cafes and over 42% visiting pub/ bar/ nightclubs. The Easting Out and Drinking Out subsection of this report below considers respondents' frequency of visits to such facilities and the most popular destinations in (and outside) Eastbourne Borough.

The 'theatre / concerts / music venue' category accounts for the next highest level of participation (almost 42% of respondents), followed by places of historical or cultural interest (about 36%), reflecting the area's range of arts, culture and live entertainment experiences. These are not commercial leisure facilities but are clearly important and complementary attractions, with Eastbourne Town Centre securing the highest (13.6%) catchment area market share of visits to galleries, museums and other places of historical or cultural interest . Eastbourne's theatres and concert venues – in particular Congress Theatre, Devonshire Park Theatre and Royal Hippodrome Theatre – are also popular attractions amongst catchment area residents and visitors from further afield.

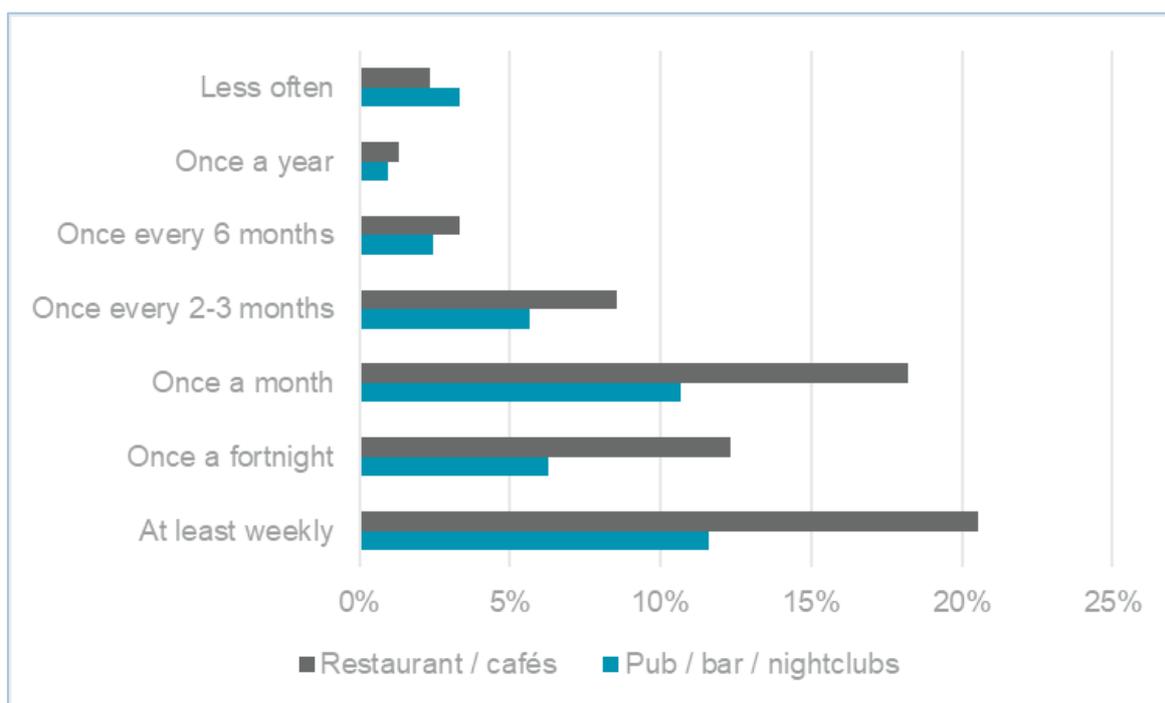
Just over a third of respondents to the household telephone survey visit the cinema. The Cinema subsection on page 99 looks at this type of activity in more detail, including the frequency of visits and existing provision in Eastbourne and the surrounding area. Participation in other types of leisure-based activities is much lower, including visits to a gym / health club / sports facility (15%) and ten-pin bowling (11%).

Eating and Drinking Out

A good quality and choice of food and beverage (F&B) uses can help to support a centre's retail function and complement the wider offer by generating footfall and extending dwell times into the evening.

As identified in Figure 89 above, eating out (i.e. restaurant/ cafes) and, to a lesser extent, drinking out (i.e. pub/ bar/ nightclubs) command the highest participation levels in leisure-based activities across the catchment area. Figure 90 below sets out the frequency of visits.

Figure 90 – Frequency of visits to 'eating and drinking out' facilities



Source: Question 24 of household telephone survey (Appendix iii).

More than one in five respondents visit restaurants and cafes at least weekly, while almost a third (in addition) eat out fortnightly or once a month. Drinking out appears to be a less frequent activity although, of those who do visit the pub/ bar/ nightclubs, most suggested that they visit at least weekly.

On the face of it, such trips and spending should support the potential to enhance the scale and choice of F&B uses in Eastbourne Borough. However, the level of growth will be subject to market conditions and demand.

To that end, a number of major chains (particularly in the 'casual dining' sector e.g. Carluccio's, Jamie Oliver, Prezzo) downsized pre-pandemic against a backdrop of increased competition and discounting, rising costs, and a tightening of consumer spending in the light of economic uncertainty. Many operators expanded too quickly into increasingly marginal locations and thus the market became saturated and unsustainable.

The pandemic and (more recently) the cost-of-living crisis has resulted in further challenges to the F&B sector, which, after the 'bounce-back' in spending on eating and drinking out that followed the relaxing of lockdowns and other restrictions, will need to cater for changing consumer demands to remain relevant and viable. This considers the shift in demand for experience-based activities (such as bars offering an additional entertainment element e.g. darts, bowling or golf) as identified in section 3 and the potential role of 'pop-up' restaurants and/or street food traders, such as those focused along the seafront section of Terminus Road as part of the Council's pedestrianised 'Food Street' initiative.

Figure 91 provides a breakdown of existing F&B outlets in Eastbourne Town Centre, which is the Borough's principal destination for eating and drinking out.

Figure 91 – Existing Food & Beverage Provision, Eastbourne Town Centre

| | Number of outlets | Percentage of F&B outlets | Percentage of Town Centre outlets | UK average (%) |
|-------------------------|-------------------|---------------------------|-----------------------------------|----------------|
| Cafes & Restaurants | 112 | 68.3% | 14.3% | 9.6% |
| Fast Food & Takeaways | 29 | 17.7% | 3.7% | 5.9% |
| Drinking Establishments | 21 | 12.8% | 2.7% | 4.7% |
| Nightclubs | 2 | 1.2% | 0.3% | 0.2% |
| Total | 164 | 100% | 20.9% | 20.4% |

Source: Experian Goad (Accessed September 2022 for Eastbourne Town Centre).

Notes: 783 outlets (or units) in Eastbourne Town Centre in total.

Eastbourne Town Centre has a reasonable F&B offer considering its size and dual function as a visitor destination, characterised by a mix of independent and chain operators. The number of cafes, restaurants and drinking establishments has increased since 2017 from 85 to 133, reflecting the growth of this sector. In particular, The Beacon shopping centre extension in 2018 has improved the choice of F&B options available. Although excluded from the Experian Goad analysis (Figure 91) the street food and other temporary traders, notably on Food Street / Victoria Place, are an important asset for the wider town centre experience and economy, offering a broad mix of catering themes and helping to create a more distinguished offer.

The overall F&B offer is dominated by cafes and restaurants (68.3% of the total number of F&B outlets) which, as a proportion of the total number of units in the Town Centre (14.3%), is well about the national average (9.6%). The next greatest sub-category is fast food and takeaways, while drinking establishments (including bars and public houses) account for just 2.7% of the total number of units in the Town Centre. This is below the national average of 4.7% and suggests the centre is potentially under-represented considering its role.

The F&B offer in the Borough’s smaller centres is relatively limited, including in the District Shopping Centres with the notable exception of Sovereign Harbour which, at The Waterfront, comprises a strong line-up of local independent restaurants and bars such as Seamors, 4 Seasons, Thai Marina, Ganges (Indian cuisine) and Pablo’s (Italian and Mediterranean cuisine).

Respondents to the household telephone survey were asked where they visit most often for the purpose of eating and drinking out. We summarise below the Borough’s market shares for pub/ bar/ nightclubs (Figure 92) and restaurant/ cafes (Figure 93) respectively.

Figure 92 – Pub/ bar/ nightclubs catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Eastbourne Town Centre | 22.7% |
| Old Town (Crown Street) District Shopping Centre | 1.9% |
| Seaside District Shopping Centre | 1.0% |
| Sovereign Harbour District Shopping Centre | 0.7% |
| Seaside Local Shopping Centre | 0.5% |

Source: Question 25 of household telephone survey (Appendix iii).

Notes: The Borough’s centres with a market share below 0.5% excluded from the analysis.

The analysis set out in Figure 92 above confirms that Eastbourne Town Centre is by far the Borough’s principal destination for drinking out. The survey research further demonstrates that the Town Centre is a popular destination for visitors from the across the wide catchment area, attracting an overall market share of about 23% (including market shares of between 40-70% from zones 9, 10, 11 and 12 which broadly reflect the extent of the Eastbourne Borough ‘urban’ area as shown on the catchment area map at Appendix [x]).

Provision of drinking establishments elsewhere in the Borough is relatively modest and this is reflected in the market shares. Where catchment area market shares have been identified, those destinations largely cater for more localised catchments (relative to Eastbourne Town Centre).

Whilst not shown in the table above, the survey-indicated market shares suggest that Eastbourne’s main competing destinations for drinking out include Lewes Town Centre (7.8%), Brighton Town Centre (7.3%), Bexhill-on-Sea (6.8%) and Seaford Town Centre (6.7%).

Figure 93 – Restaurant/ cafes catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Eastbourne Town Centre | 24.9% |
| Sovereign Harbour District Shopping Centre | 2.2% |
| Hampden Park (Brassey Avenue) District Shopping Centre | 0.8% |
| Old Town (Crown Street) District Shopping Centre | 0.8% |
| Langney District Shopping Centre | 0.7% |
| Seaside District Shopping Centre | 0.7% |
| Seaside Local Shopping Centre | 1.1% |

Source: Question 26 of household telephone survey (Appendix iii).

Notes: Hot food takeaways not explicitly captured in the market share analysis although clearly some restaurants and cafes will offer a takeaway service. The Borough’s centres with a market share below 0.5% excluded from the analysis.

Figure 93 above shows that Eastbourne Town Centre attracts a 25% catchment area market share in respect of restaurant/ cafes, slightly higher than the ‘drinking out’ market share of 22.7% observed previously. Given its line-up of local independent restaurants and bars, Sovereign Harbour is the Borough’s next most popular destination for eating out with a 2.2% catchment area market share.

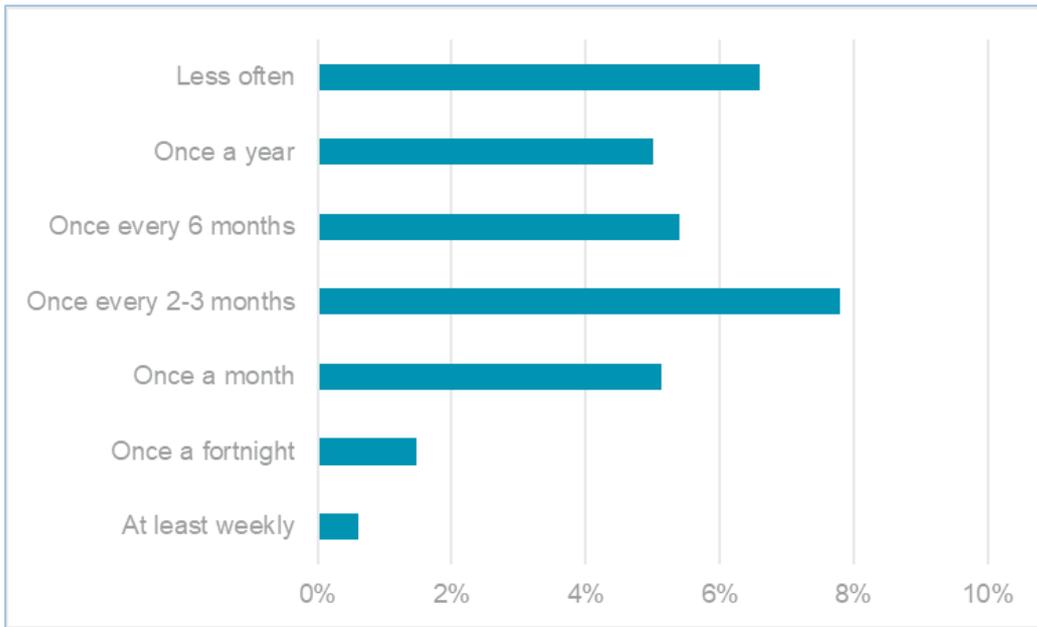
The main competing destinations for eating out (as indicated by the household telephone survey) are Bexhill-on-Sea, with a catchment area market share of 10.3%, Lewes Town Centre (8.9%) and Brighton Town Centre (8.8%).

Cinema

As set out in section 3 of this report, the cinema sector was heavily affected by the pandemic-induced closures and social distancing measures, which led to some large cinema operators facing financial hardship.

Figure 94 below reveals how often respondents to the household telephone survey visit the cinema. It confirms that most cinema users visit once every 2-3 months (about 8%). Just over 7% visit at least once a month; however, 17% visit no more than once every 6 months on average. Bearing in mind that 66% of respondents 'never' visit the cinema, these findings suggest relatively low levels of participation across the catchment area.

Figure 94 – Frequency of visits to: Cinema



Source: Question 24 of household telephone survey (Appendix iii).

Eastbourne Borough’s only existing cinema is the 8-screen Cineworld in Eastbourne Town Centre, which relocated from Sovereign Harbour to anchor the Arndale Centre (now The Beacon shopping centre) extension in 2018. This is the most popular cinema destination in the catchment area, securing an overall 39.7% market share, as shown in Figure 95 below. The main competing cinemas include the Lewes Depot 3-screen cinema and the Cineworld at Brighton Marina to the west; and to the north of the catchment area, Picture House Cinema in Uckfield and the Hailsham Pavilion Theatre & Cinema.

Figure 95 – Cinema catchment area market shares

| Destination | Catchment Area % market share |
|---|-------------------------------|
| Cineworld, The Beacon, Eastbourne Town Centre | 39.7% |
| Depot, Pinwell Road, Lewes | 17.4% |
| Cineworld, Marina Square, Brighton Marina | 14.7% |
| Picture House Cinema, High Street, Uckfield | 8.7% |
| Hailsham Pavilion Theatre & Cinema, George Street, Hailsham | 6.9% |
| Elsewhere outside the Borough | 9.2% |
| (Don't know / varies) | 3.4% |

Source: Question 22 of household telephone survey (Appendix iii).

We are not aware of any cinema requirements in Eastbourne Borough and note that the former Cineworld at Sovereign Harbour is the subject of change of use proposals to a Class E(a) retail warehouse with external garden centre (to be occupied by B&M).

Bingo / Casino

The gaming and gambling sector has been faced with falling admissions and therefore closures in the past ten years or so, driven by the indoor smoking ban and a shift to online-based platforms. To that end, almost 97% of respondents to the household telephone survey indicated that they 'never' visit bingo/ casino facilities.

Figure 96 below shows catchment area respondents' frequency of visits to the bingo/ casino. Illustrating low participation in these types of leisure-based activities, only around 0.7% of respondents indicated that they visit such facilities once a month or more.

Figure 96– Frequency of visits to: Bingo / casino



Source: Question 24 of household telephone survey (Appendix iii).

The Borough's main destination for this type of activity is Leo Leisure Bingo Club in Eastbourne Town Centre, which attracts a catchment area market share of about 27% as shown in Figure 97 below. A market share of 6.4% is secured by other facilities in Eastbourne.

Overall, Eastbourne Borough retains approximately a third of bingo/ casino participation within the catchment area. The main competing destination is Buzz Bingo in Brighton.

Figure 97 – Bingo/ casino catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Leo Leisure Bingo Club, Eastbourne Town Centre | 26.9% |
| Other facilities in Eastbourne [1] | 6.4% |
| Buzz Bingo, Brighton | 26.1% |
| Bingo At The Deluxe, Hastings | 6.4% |
| Elsewhere outside the Borough | 23.9% |
| (Don't know / varies) | 10.3% |

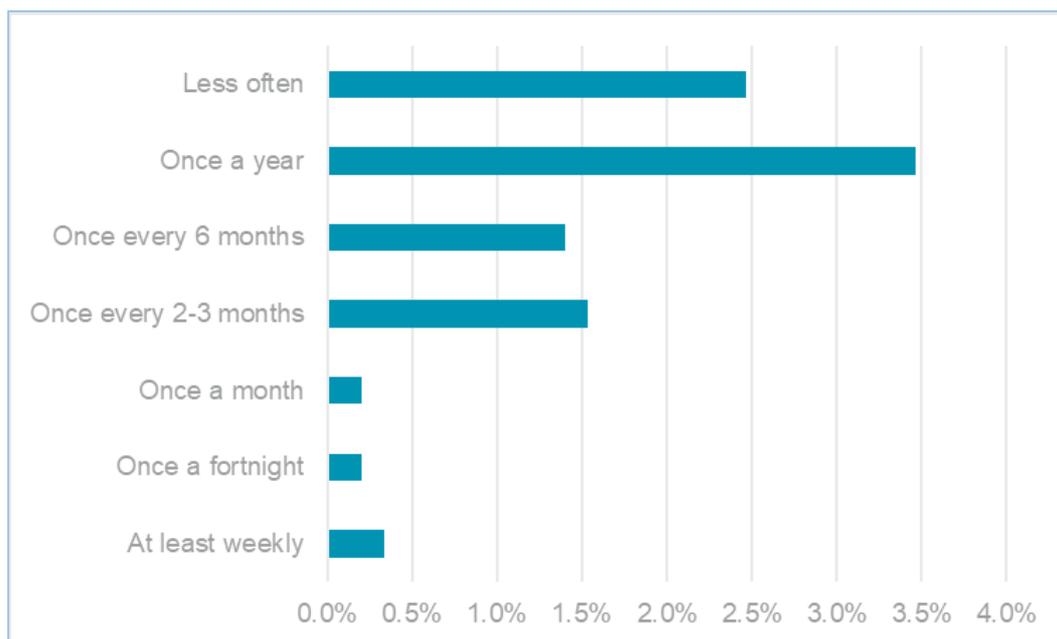
Source: Question 29 of household telephone survey (Appendix iii).

Notes: [1] Destination(s) not given in the household telephone survey.

Ten-Pin Bowling

Ten-pin bowling is a long-established commercial leisure activity, particularly for families and social groups. Like cinemas, however, such facilities were heavily affected by the pandemic-induced trading restrictions and tend to attract occasional (or less frequent) visits as shown in Figure 98 below. Some 89% of respondents to the household telephone survey indicated that they 'never' go ten-pin bowling.

Figure 98 – Frequency of visits to: Ten-pin bowling



Source: Question 24 of household telephone survey (Appendix iii).

Tenpin at Hampden Park is the Borough's main commercial ten-pin bowling attraction. It is also the most popular facility within the catchment area according to the household telephone survey, retaining a 37.2% market share as shown in Figure 99 below. The main competing ten-pin bowling facility is Brighton Marina's Hollywood Bowl.

Figure 99– Ten-pin bowling catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Tenpin, Broadwater Way, Hampden Park, Eastbourne | 37.2% |
| Other facilities in Eastbourne [1] | 12.4% |
| Eastbourne Indoor Bowling Club, Hampden Park, Eastbourne | 1.6% |
| Hollywood Bowl, Marina Square, Brighton Marina | 32.4% |
| Elsewhere outside the Borough | 10.1% |
| (Don't know / varies) | 6.3% |

Source: Question 30 of household telephone survey (Appendix iii).

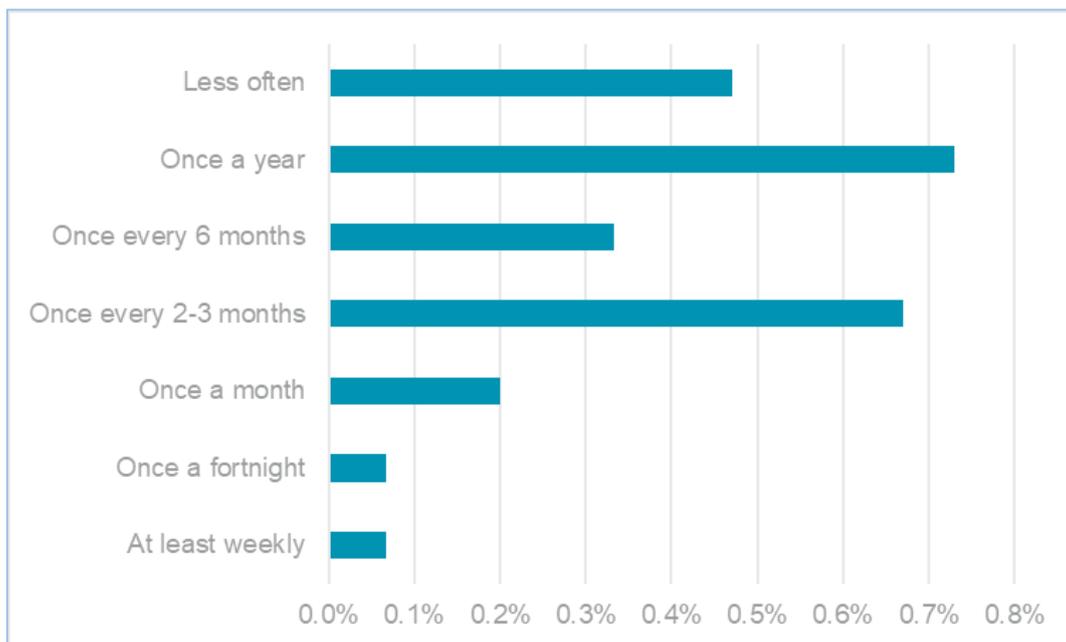
Notes: [1] Destination(s) not given in the household telephone survey.

Indoor Trampoline

Trampoline parks have been one of the fastest growing sport and leisure trends in the past ten years, catering particularly well for younger age groups and therefore attracting families and groups. Like ten-pin bowling, however, trampolining tends to be an occasional leisure experience.

Confirming this, Figure 100 below shows how often “jumpers” visit indoor trampoline facilities based on the results of the household telephone survey. Around 96% of respondents indicated that they ‘never’ visit such facilities.

Figure 100 – Frequency of visits to: Indoor trampoline



Source: Question 24 of household telephone survey (Appendix iii).

The most popular trampoline parks are located outside the Borough, on industrial estates, in Heathfield (Urban Jump) and Peacehaven (Sky High) as shown in Figure 101 below. Facilities in Eastbourne attract a relatively limited catchment area market share.

Figure 101 – Indoor trampoline catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Facilities in Eastbourne [1] | 6.3% |
| Urban Jump, Ghyll Road Industrial Estate, Heathfield | 36.6% |
| Sky High Trampoline Park, Meridian Industrial Estate, Peacehaven | 25.4% |
| Elsewhere outside the Borough (Don't know / varies) | 13.7% 18.0% |

Source: Question 31 of household telephone survey (Appendix iii).

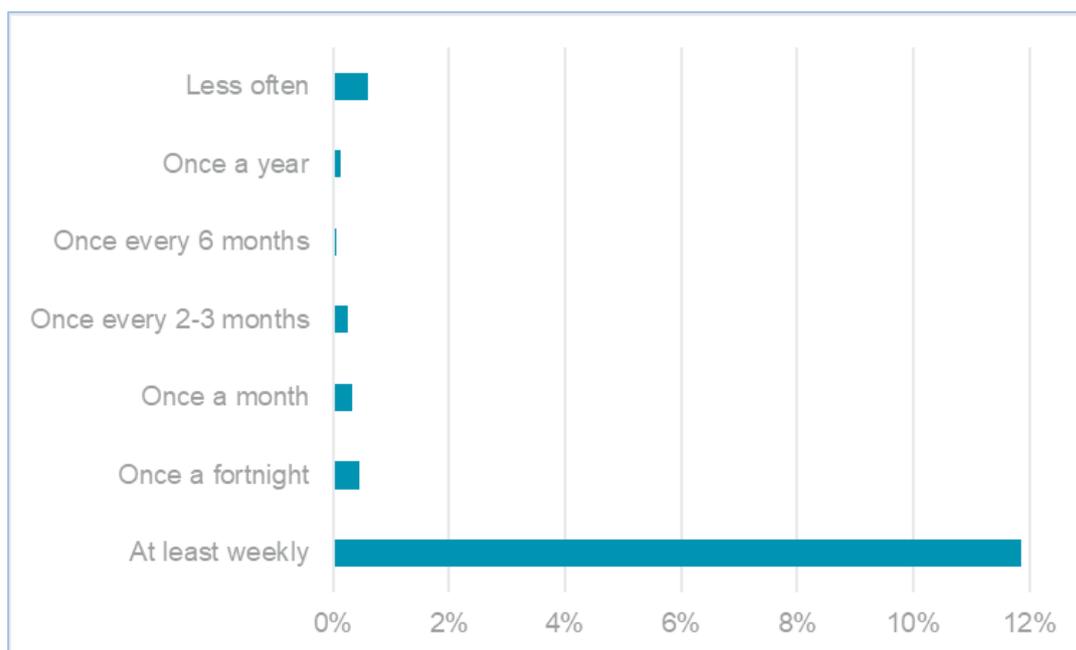
Notes: [1] Destination(s) not given in the household telephone survey.

Gym / Health Club / Sports Facility

Notwithstanding the impact of the pandemic on this sector, gyms and health & fitness facilities can make an important contribution towards town centre footfall and activity. The budget operators offering flexible and discounted subscriptions have experienced the most significant growth in recent years, while female-only gyms are growing in popularity, yet all operators are faced with increasing competition from 'at home' digital fitness platforms and equipment.

Whilst 85% of respondents to the household telephone survey do not visit gyms and health & fitness facilities, Figure 102 below shows that around 12% visit at least weekly.

Figure 102 – Frequency of visits to: Gym / health club / sports facility



Source: Question 24 of household telephone survey (Appendix iii).

Figure 103 below identifies some of the main public and private gyms and health & fitness facilities in the Borough, together with the survey-indicated market share of such facilities (insofar as available based on the results of the household telephone survey). It shows an overall retention level of 40.7% with David Lloyd at Hampden Park being the most popular (14.1%) followed by Bannatyne Health Club off the A22 (5.2%) and The Gym Group at Sovereign Harbour (4.7%).

The analysis indicates that existing gyms and health & fitness facilities in Eastbourne Town Centre secure very limited market shares.

Figure 103 – Gym/ health club/ sports facility catchment area market shares

| Destination | Catchment Area % market share |
|--|-------------------------------|
| Anytime Fitness, Langney Road, Eastbourne Town Centre | - |
| Original Gyms, South Street, Eastbourne Town Centre | 0.8% |
| Bannatyne Health Club, Edward Road, Eastbourne | 5.2% |
| Boss Gym, Brampton Road, Eastbourne | 0.8% |
| Cavendish Sports Centre, Eldon Road, Eastbourne | - |
| David Lloyd, Broadwater Way, Hampden Park, Eastbourne | 14.1% |
| Hampden Park Sports Club, Brodrick Road, Eastbourne | 0.8% |
| Performance Fitness, Maple Road, Eastbourne | 0.9% |
| Shinewater Sports Centre, Milfoil Drive, Langney, Eastbourne | - |
| Snap Fitness, Langney Shopping Centre, Eastbourne | - |
| Sovereign Centre, Royal Parade, Eastbourne | 4.5% |
| The Gym Group, Sovereign Harbour, Eastbourne | 4.7% |
| Elsewhere in Eastbourne (not specified) | 8.9% |

Source: Question 32 of household telephone survey (Appendix iii).

Summary and Accommodating Commercial Leisure Needs

The commercial leisure sector is dynamic and changing rapidly. As highlighted earlier, there is no robust method for assessing commercial leisure needs in quantitative terms owing to the unpredictable nature of leisure trips and a lack of reliable performance data.

This section has therefore reviewed the Borough’s commercial leisure needs in qualitative terms, supported by the results of the household telephone survey and other sources of data.

Having assessed the current supply of key leisure facilities across Eastbourne Borough, including regard for survey-indicated participation rates and the main destinations, we set out below any deficiencies in the commercial leisure offer and advise whether any new provision should be planned for.

Dealing first with **F&B provision**, eating and drinking out is the most popular leisure-based activity in the catchment area, with almost 70% of respondents to the household telephone survey visiting restaurant/ cafes and over 42% visiting pub/ bar/ nightclubs.

Eastbourne Town Centre is the main destination for such activities, which is unsurprising given its size and status as a seaside/tourist destination and noting the growth in F&B provision over the past five years which, in part, can be attributed to the opening of Cineworld as part of The Beacon shopping centre extension. We would also highlight that levels of satisfaction with the Town Centre’s existing F&B offer appear to be high, with 0% (zero) survey respondents identifying ‘more or better cafes/ restaurants/ pubs’ as an area for improvement to encourage them to visit more often

The scale of any growth in F&B provision will largely be dependent on market demand. However, we would assess that the Town Centre’s existing vacant units and/or larger units in need of reconfiguration and modernisation – or indeed redevelopment – provide sufficient opportunities for any future needs to be met. These could include the voids within The Beacon (our healthcheck assessment identifies a vacancy rate of 17% within the shopping centre and surrounds) and the ground floors of both the former Debenhams department store (understood to be a potential ‘strategic site’ local plan allocation for redevelopment of circa 120 flats plus ground floor commercial space) and the former TJ Hughes department store (currently the subject of a ‘resolution to grant’ planning application for residential-led redevelopment with flexible Class E floorspace at ground floor level¹¹).

¹¹ Application ref. 220633.

Given its location characteristics and dual function, as a popular visitor destination as well as serving local needs, Eastbourne Town Centre is well suited to capitalising on many of the retail, consumer and place trends identified in section 3 of this report. Consumers and town centre users are looking for more experiences and, in this respect, the importance of specialist, experience-driven catering options cannot be underestimated. Good examples in the Town Centre include Food Street / Victoria Place and Grove Road (Little Chelsea) which are underpinned by independent and largely local businesses, including temporary pop-ups, rather than the middle market 'casual dining' chains that (as previously observed) have been struggling and downsizing in many locations across the UK. The strength of these specialist F&B clusters is a major asset for the Town Centre to build on, not least because they serve to improve the sense of place and independence and bring many other benefits to the wider town centre economy at a time when all centres need to be more multi-purpose in their offer, use and experience.

Therefore, as well as continuing to promote and invest in concepts such as the pedestrianised 'Food Street' along Eastbourne's seafront, EBC should plan positively and flexibly for F&B uses in the Borough's centres in accordance with the sequential approach. The demand for new F&B uses in the Borough's smaller centres is likely to be limited: existing units are likely to meet any future needs, as and when suitable units become available.

The Borough's **cinema** offer is limited to the 8-screen Cineworld in Eastbourne Town Centre, which is the most popular cinema destination across the catchment area. Its main competing facilities are the Lewes Depot 3-screen cinema and the Cineworld at Brighton Marina, with further neighbourhood-style provision in Uckfield (Picture House Cinema) and Hailsham (Hailsham Pavilion Theatre & Cinema). Noting also that the former Cineworld at Sovereign Harbour is the subject of retail warehouse proposals, we consider there is no need for EBC to plan for any additional cinema provision in the Borough.

We reach the same conclusion in respect of bingo/ casino and ten-pin bowling facilities. Consumer demand for bingo/ casino has fallen considerably in recent years and the survey research has indicated low participation in this type of leisure-based activity. Whilst the Borough's main destination – Leo Leisure Bingo Club – appears to attract a reasonable catchment area market share, we assess there is no qualitative need for additional provision.

In terms of future needs for **ten-pin bowling**, we consider Tenpin at Hampden Park – together with other such facilities in Eastbourne – satisfies the demand for this type of activity. This is based on relatively low and infrequent participation levels but an otherwise reasonable level of retention (Eastbourne's ten-pin bowling venues secure a 51% total market share from across the catchment area).

There is currently no identified need for **trampoline parks**. Existing participation rates are low. That said, usage is dominated by facilities outside Eastbourne Borough (at Heathfield and Peacehaven respectively) and this would suggest scope for additional provision in Eastbourne, subject to market demand and the availability of premises that can meet operational requirements. Those requirements often dictate that town centres are not optimal locations for trampoline parks; hence they are generally situated out-of-centre (for example) on industrial estates. Nevertheless, should proposals come forward for a new indoor trampoline facility in or on the edge of the Borough's centres, they have the potential to complement and enhance the range of leisure-based experiences available.

We further assess that Eastbourne Borough is reasonably well served by **gyms and health & fitness facilities** which, by their nature, tend to serve relatively localised catchments. Existing provision is largely focused outside the Town Centre, which has a limited choice of gyms.

In the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the Borough's centres in accordance with the sequential approach to strengthen their diversity of uses and overall vitality. Larger format uses should be encouraged in Eastbourne Town Centre in particular, commensurate with its position in the retail hierarchy and to improve its role as the Borough's main evening and night-time economy destination. These are more likely to come forward as part of mixed-use schemes (as opposed to standalone formats) for commercial viability reasons.

Non-commercial leisure uses and activities are an important element of the all-round leisure offer and our assessment has identified that trips to theatres and concert venues, and places of historical or cultural interest (e.g. galleries, museums), are the most popular leisure-based activities after eating and drinking out. To that end, Eastbourne's theatres are particularly strong attractions in or close to the Town Centre, while Eastbourne Town Centre (according to the survey research) is the top destination for visiting places of historical or cultural interest amongst catchment area residents.

8. TOWN CENTRE BOUNDARIES & PRIMARY SHOPPING AREAS

Introduction

In this section, we review the town centre boundaries and primary shopping areas for the following centres in Eastbourne Borough:

- Eastbourne Town Centre;
- the District Shopping Centres of;
 - o Green Street (Albert Parade)
 - o Hampden Park (Brassey Avenue)
 - o Langney Shopping Centre
 - o Meads Street
 - o Old Town (Crown Street)
 - o Seaside (Langney Road to Springfield Road and adjacent to St James' Road)
 - o Sovereign Harbour

We also set out the potential for consideration of Article 4 Directions to remove national permitted development rights, specifically relating to change from Class E uses to residential.

Town Centre Boundaries

Annex 2 (Glossary) of the NPPF defines a 'town centre' as:

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

The NPPF requires local plans to define the extent of town centres (paragraph 86b) and to keep town centre boundaries under review (paragraph 86d) so that meeting anticipated needs for retail, leisure, office and other main town centre uses – looking at least ten years ahead – is not compromised by limited availability of suitable sites.

Sections [6] and [7] of this report contain up-to-date assessments of the need for retail and leisure development in the Borough. We have identified very limited capacity for additional convenience goods floorspace over the plan period (up to about 400 sqm net sales area across the Borough) and substantial 'negative' capacity for comparison goods floorspace. We have also identified limited demand for new leisure development, with F&B likely to comprise the main growth sector, and have assessed that vacant and/or under-utilised units should help to accommodate any residual future growth. Yet, recognising that main town centre uses are not limited to retail and leisure development, it is appropriate to consider extending some of the town centre boundaries to better reflect the distribution of such uses.

To that end, our review necessarily takes account of the implications of recent planning reforms. These comprise the Use Classes Order including the 'new' Class E; and the permitted development right (PDR) effective since August 2021 allowing the conversion of Class E uses to residential. Class E encompasses many – but not all – main town centre uses as well as some non-main town centre uses (e.g. clinics, health centres, creches). Whilst the NPPF makes no provision for this change to the Use Classes Order, Class E reflects the Government's intention to support the adaptation of town centres and, therefore, our review considers whether it is appropriate and justified to revise any boundaries to account for this broader range of uses.

Meanwhile, the new PDR introduced in 2021 allows for the change of use from Class E uses to residential (extending a right that had previously been restricted to offices). It is subject to maximum size requirements (up to 1,500 square metres), the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'Prior Approval' for the change of use must be sought from the local planning authority. Restrictions on this right apply for listed buildings¹², as well as in areas that are covered by Article 4 Directions.

In this context, our review provides an evidence base to inform the town centre boundaries for the emerging Local Plan Policies Map. It is intended to update the boundaries identified on the Eastbourne Policies Map (adopted February 2013) for the Town Centre; and in Appendix C of the Eastbourne Core Strategy for the District Shopping Centres.

Thus, using the existing development plan boundaries as our starting point, we carried out town centre inspections during [September and October 2022] in conjunction with our survey work for the healthcheck audits. Factors relevant to the town centre boundary reviews include:

- the location and nature of existing uses within and at the edges of each centre;
- the location of vacant units and their potential for re-use; and
- each centre's built form and other physical barriers (such as main roads or railway lines).

Our proposed town centre boundaries are included at Appendix iv. The following provides an overview of the changes recommended for each centre:

- Eastbourne Town Centre: we recommend contracting the town centre boundary north of the railway line (excluding the site allocation¹³) to reflect the increasingly residential character of this area; contracting the boundary to the east so as to exclude the designated Neighbourhood Shopping Centre (Cavendish Place) and surrounding residential; and contracting the boundary to the southwest so as to exclude the designated Neighbourhood Shopping Centre (Meads – Carlisle Road) and surrounding residential.
- Green Street (Albert Parade): we recommend combining the existing (several) boundaries into one town centre boundary, plus including within the boundary the Sainsbury's Local and the new Victoria Medical Centre to the west of Victoria Drive.
- Hampden Park (Brassey Avenue): we recommend extending the town centre boundary to include Hampden Park Community Hall, Health Centre and Library to the north.
- Langney Shopping Centre: we recommend contracting the town centre boundary [on land to the west which has been built out for residential].
- Meads Street: the only recommended change is combining the existing (several) boundaries into one town centre boundary.
- Old Town (Crown Street): we recommend extending the town centre boundary to include both the public house (The Rainbow) to the northeast and the public house (The Lamb) and other commercial uses to the southwest along High Street; and we also recommend contracting the town centre boundary to the northwest where shops have been converted to residential along Ocklynge Road.
- Seaside (Langney Road to Springfield Road and adjacent to St James' Road): we recommend combining the existing (several) boundaries into one town centre boundary, plus including within the boundary the concentration of shops and other commercial uses to the south.
- Sovereign Harbour: we recommend extending the town centre boundary to include Sovereign Harbour Community Centre to the north.

Primary Shopping Areas

Annex 2 (Glossary) of the NPPF defines a 'primary shopping area' as *where retail development is concentrated*.

¹² Although the right does, otherwise, apply in conservation areas.

¹³ Land adjoining the Railway Station and the Enterprise Centre (site ref. TO55) – Eastbourne Land Availability Assessment 2022.

The extent of a centre's primary shopping area determines whether a site or building should be considered in-centre (i.e. within the primary shopping area), edge-of-centre or out-of-centre; and is therefore key to the application of the sequential and impact tests set out in the NPPF.

Edge-of-centre is defined as:

For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

Out-of-centre is a location which is not in or on the edge of a centre.

There is no longer a national policy requirement to define primary and/or secondary shopping frontages¹⁴. Paragraph 002 of the PPG does state that local planning authorities may, where appropriate, wish to define frontages *where their use can be justified in supporting the vitality and viability of particular centres*. However, we consider that the definition and application of primary and secondary frontages is now outdated – not least since the changes to the Use Classes Order¹⁵ introduced in September 2020 – and too inflexible. In our view, frontage policies can constrain the delivery of a mix of non-retail uses and activities that, as well as helping to support retail, can add significantly to the overall health and attractiveness of town centres in a manner that Class E generally provides for.

Moreover, in the light of the introduction of Class E and the new PDR allowing changes of use from Class E uses to residential without the need for planning permission (albeit subject to 'Prior Approval' and the need to satisfy certain criteria), the relevance of defining a primary shopping area (PSA) is becoming less apparent, in our view, other than for its important role in both the sequential and impact tests. This is further underlined by the findings of this Study, which show very limited capacity for convenience goods floorspace and substantial 'negative' capacity for comparison goods floorspace, as well as a significant reduction in retailer demand.

In this context, with the exception of Eastbourne Town Centre, we consider that the existing centres are relatively small and do not lend themselves to the identification of a PSA that is different to the wider town centre boundary. As such, for the District Shopping Centres, we would recommend that the PSA extends to the same area as the town centre boundary shown in Appendix iv.

Our proposed PSA for Eastbourne Town Centre is also shown in Appendix iv and combines the existing primary and secondary areas (on the basis national policy no longer requires secondary shopping frontages/areas to be defined). We further recommend extending the PSA to include Enterprise Shopping Centre to the north; the additional shops and services on Grove Road (including Tesco Express); and the additional shops and services on Langney Road (including Iceland).

Article 4 Directions

As highlighted above, a new PDR was introduced in 2021 allowing for the change of use from Class E uses to residential (subject to certain restrictions and Prior Approval from the local planning authority). Paragraph 53 of the NPPF allows for the use of Article 4 Directions to remove this PDR where appropriate and *'necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre).'*

As part of the definition of the PSA boundaries, EBC may wish to consider the need to apply for Article 4 Directions where the loss of town centre shops and other commercial uses to residential has the potential to seriously undermine the vitality and viability of the centre(s) over the next five years and beyond.

¹⁴ Prior to the latest NPPF (July 2021), national policy defined primary shopping areas as areas *where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage)*.

¹⁵ Including the 'new' Class E encompassing retail, commercial, business and service uses.

We have already observed in section 6 the trend of retail floorspace being lost to alternative uses including residential although, based on our inspections carried out in preparation of this Study, we have not identified an unacceptable adverse impact on any primary shopping area and/or town centre. In fact, it is considered that new residential uses in or close to the centres will help to generate new trips, footfall and spend for the benefit of existing shops and businesses, as well as supporting new provision. It also remains to be seen, on a practical level, the extent to which further changes of use to residential (e.g. within former shop units) will be feasible and/or attractive to private investors.

Ultimately, however, maintaining suitable accommodation for Class E businesses within the key shopping / commercial areas of the Borough's centres will be necessary to ensure their future vitality and viability. In terms of the evidence which EBC may wish to explore in determining whether Article 4 Directions are necessary and justified, this could include:

- Location of key retailers and shopping areas (i.e. those which are important drivers of activity and help to sustain other, smaller shops and businesses);
- Areas with low or no evidence of shop vacancies (this being an indicator of the demand for commercial uses and thus areas that should be afforded protection);
- Evidence of important growth sectors (e.g. F&B);
- Changes in footfall (areas where footfall levels are increasing or being maintained provides an indication of commercial performance);
- Class E versus residential values (areas where residential values could be higher than for Class E uses are likely to come under more pressure from PDR); and
- Housing supply and the role of town centre locations in meeting identified needs.

It should be noted that the Government's position on PDR and Article 4 Directions could change in the near future, subject to what comes forward under the future planning reforms including the new NPPF prospectus.

9. SUMMARY & POLICY RECOMMENDATIONS

Introduction

This Study has been prepared by Cushman & Wakefield and CPW Planning and provides the evidence base to assist EBC with its work on the emerging Local Plan, and to support the development management function of the local planning authority.

We summarise below the key findings and conclusions before making a series of policy recommendations.

Study Findings and Conclusions

Health & Function of the Main Centres

Eastbourne Town Centre

Eastbourne Town Centre is the principal focus for shopping, leisure and business activity within the Borough Council area. It contains a large amount of high street retail provision, as well as a variety of leisure uses. As well as being one of the principal retail and leisure destinations for the region, it is also a major seaside town with a significant number of hotels, in particular along the seafront.

As a result of its size, it houses several distinct shopping areas within its boundaries, all of which combine to create a diverse town centre. There is also variance in the environmental quality of the centre within these areas however, for example:

- The Beacon Shopping Centre and its surrounds benefit from the relatively recent redevelopment of the centre itself, the pedestrianisation of the roads surrounding it, and also improvements to its built environment.
- The section of Terminus Road between the former Debenhams building to the seafront is also pedestrianised and regularly hosts markets that boost footfall significantly.
- The area around Eastbourne Station is generally well maintained with fair environmental quality, however this is slightly compromised by the presence of several large roads.
- Little Chelsea comprises two attractive, historic streets that are generally quieter than the remainder of the centre.

Retail rents in Eastbourne Town Centre – specifically around the Beacon – are significantly higher than all other Eastbourne centres assessed within this report, demonstrating the relative strength of Eastbourne’s prime retail area.

Whilst the retail, leisure and hospitality in Eastbourne are all relatively strong, for a town of its size and stature it has a small amount of office provision, with only a small number of private and public sector entities having a presence in the region, and limited demand for new office space.

This paints a picture of a town centre that is generally very healthy; one that serves both its year-round population as well as its high number of visitors adequately.

Green Street (Albert Parade)

Green Street (Albert Parade) is approximately 1.3 miles north west of Eastbourne Town Centre. It has a predominantly local retail-led function, and is the principal service location for its surrounding area. The centre is relatively balanced in terms of its diversity of uses.

The environmental quality of this centre is generally good. It is tree-lined, clean, and has a small park and public toilet at its northern end. The street comprises predominantly attractive red brick buildings with generally well-maintained shop fronts.

The centre has strong rental figures compared with many of the centres assessed within this document, and this coupled with the lack of vacancies, good mix of retailers and strong footfall combine to suggest a centre that is very healthy and serves its local population well.

Hampden Park (Brassey Avenue)

Hampden Park (Brassey Avenue) is situated approximately 2.0 miles north of Eastbourne Town Centre, and is concentrated around a large Tesco Superstore plus a high street.

The environmental quality of this centre is relatively low, due to the combination of a railway level crossing on the eastern boundary which backs up traffic along the main road. Beyond traffic, the streetscape itself is also relatively poor quality; of particular note, pedestrian access to the Tesco from Brassey Avenue is via an alleyway surrounded by dead frontages and bin stores.

Whilst only two of the units (6%) are listed as vacant, a further six were shuttered on our visit which again further lowers the vibrancy of the centre. Putting pressure on the vibrancy of this centre long-term is the very large Hampden Retail Park, which is in close proximity to this centre. This retail park houses a number of national retailers including Halfords, B&Q and Dreams Beds, in addition to being surrounded by several other large supermarkets including a Morrison's and Aldi.

Rents in the centre are relatively strong given the perceived low quality of the high street, however alongside the remainder of our analysis our conclusion is that the overall health of this centre is relatively low.

Langney Shopping Centre

Langney Shopping Centre entirely comprises the shopping centre and surrounding car parks, which are situated approximately 2.5 miles north east of Eastbourne Town Centre.

One of the main notable features of this centre is the high vacancy rate on a per-unit basis, as over a quarter of all units are vacant. This creates an impression of a lack of vitality as they are visible throughout the centre. Additionally, several tenanted units have almost completely blank frontages, further exacerbating the impression of a high level of vacancy.

Market rents are among the lowest rents of the Eastbourne centres, in part – in particular when combined with the high vacancy rates – verifying our perception of the centre as lacking vitality.

Meads Street

Meads Street is situated approximately 1.1 miles south west of Eastbourne Town Centre. It is an attractive, historic shopping street with shops that are predominantly well-maintained. The centre is diverse for its size, and whilst there are some vacancies, the vacancy rate is low relative to other town centres within Eastbourne and the UK.

This centre has rents of a similar level to the highest rents within this study away from Eastbourne Town Centre. This, combined with the low vacancy rate and high quality of the centre is symptomatic of a healthy town centre environment.

Old Town (Crown Street)

Old Town (Crown Street) is located approximately 0.6 miles north west of Eastbourne Town Centre. The centre is dominated by a large Waitrose supermarket, plus a small additional retail area focused around Crown Street to the north. Aside from the Waitrose, units within this centre are almost solely small independent businesses.

The market rents for this centre are relatively high compared with the other centres analysed, indicating it is a healthy retail environment, albeit with the caveat that the vast majority of the centre is taken up by the Waitrose, which likely skews the rental values upwards.

Seaside (Langney Road to Springfield Road)

Seaside (Langney Road to Springfield Road) is a centre formed along a main road, Seaside, that extends c. 0.3 miles north east from near the eastern edge of the Eastbourne town centre boundary. The environmental quality of this centre is mixed, as it is along a busy road and a not-insignificant proportion of the shopfronts, the buildings above them, and the pavement along the road, are not maintained to a high standard.

The vacancy rate is relatively low, but we noted a number of residential conversions at ground floor level where there would have previously been retail, which indicates that a significant reason for the low vacancy rate in this centre is due to the – presumably permanent – removal of retail units from the centre.

Rents are lower than all but two centres within this report, which coupled with our other analysis of this centre demonstrate it has a poor overall health for an Eastbourne centre.

Sovereign Harbour Retail Park

Sovereign Harbour Retail Park is approximately 2.4 miles north east of Eastbourne Town Centre, and entirely comprises the shopping centre and surrounding car parks. It is – in terms of its overall site area – a very large retail park, however much of this space is dedicated to on-site parking, and the diversity of uses is low as a result of this park predominantly comprising a few, large units.

There are no independent businesses within the shopping centre itself, however the Waterfront Centre does contain a number of small independent (or small chain) leisure businesses.

Only two of the units within the retail park are vacant, however vacancies also comprise the third-largest apportionment (on a use category basis) of floorspace within the park because of the large size of those vacant units.

Rents are similar to the majority of Eastbourne centres, indicating the centre is relatively healthy and performing well from a commercial perspective.

Rodmill

Rodmill is a small centre comprising nine retail units in a short row of shops along Framfield Way, approximately 1.2 miles north of Eastbourne Town Centre. The majority of businesses within this centre are independent, with the exception of the Co-op and betting shop. There are no vacancies within this centre, and this has remained the case since at least 2018.

Rents are broadly aligned with other Eastbourne centres, and it is reasonable to conclude that in this location the strength of the centre, at least at this level of provision, rather than limited supply, is what is keeping rents high and therefore that the centre is generally healthy.

St. Anthony's (Beatty Road)

St Anthony's is a very small shopping route within a suburban housing area, comprising nine retail units, located approximately 2 miles north east of Eastbourne town centre. The centre has no vacancies, and this has been the case since at least 2019.

Rents are at the upper end of Eastbourne centres analysed within this report, although this comes with the caveat that its small size potentially pushes rents up as there is greater competition for fewer available units.

Given the overall analysis of this centre – principally its consistent lack of vacant space – it is reasonable to conclude that in this location it is more the strength of the centre, at least at this level of provision, than limited supply, keeping rents high, and thus this is a generally healthy centre for its size.

Seaside (Seaford Road to Channel View Road)

Seaside (Seaford Road to Channel View Road) is a local shopping centre formed along Seaside, a main road that runs south west to north east from the edge of Eastbourne town centre and onwards to Langney Roundabout. This centre is very close to several large retail parks that will provide significant competition to this centre.

Its vacancy rate is 21% of all units, which is higher than the PROMIS 200 retail centre average vacancy rate of 19.1% of town centre units, although one restaurant unit appeared to be undergoing refurbishment ahead of a new business moving in.

Rents in this centre are similar to the majority of Eastbourne centres assessed in this report, indicating the centre is relatively healthy, however the vacancy rate remains a concern.

The Broadway (Hampden Park)

The Broadway (Hampden Park) is a local shopping centre within an almost exclusively residential location, comprising twelve retail units, and on the date of our site visit there were no vacancies. The environmental quality of this centre is relatively low; the Broadway itself is predominantly a small, poorly surfaced loop road around the retail provision.

We noted the development of a new Co-op food store on the site of the former public house depicted to the north of the centre boundary

Market rents are lower than all but three centres within this report, indicating this centre is not considered desirable to prospective tenants relative to other Eastbourne centres, and supports our overall conclusion that this is a struggling centre.

Queens Parade (Hampden Park)

Queens Parade (Hampden Park) is a local centre situated approximately 0.15 miles north east of Hampden Park railway station. The centre itself comprises ten retail units and some off-street parking. Whilst only one of these units is listed as vacant within this assessment, at the time of our visit every unit with the exception of Morrisons and a very small hair salon appeared to be shut.

The main issues for this centre result from the significant pressure from the retail centres and large retail parks nearby, where there are a variety of large shops including a very large Morrisons, an Aldi, and a number of other large comparison retailer providing a significant amount of competition.

Rents are similar to the majority of Eastbourne centres assessed in this report, however in this instance we do not consider this to be truly reflective of the health of this centre specifically on the basis of our site visit, and on the basis of our visit our conclusion is that this centre is not healthy and is struggling in particular as a result of the aforementioned nearby competition from larger retailers.

Old Town (Victoria Drive)

Old Town (Victoria Drive) is a small, local centre comprising only five shops on Victoria Drive in the Old Town area in the north west of Eastbourne, approximately 1.35 miles from the town centre. There are no vacancies in this centre, and have been none since at least 2016, and as such there is very little rental evidence for this centre. The persistent lack of vacancies imply this is a relatively healthy centre for its size, although this is with the caveat that the location is very secondary.

Grand Hotel Buildings (Meads)

Grand Hotel Buildings (Meads) is a linear retail parade along Compton Street, approximately 0.6 miles south west of Eastbourne Town Centre. The Grand Hotel is a very impressive building architecturally, and the shops sitting on the retail parade within the building have generally high quality facades that are well-maintained.

The centre comprises 13 retail units within the rear of the Grand Hotel building, and are let entirely to small local businesses, with the exception of the two vacant units. Rents are similar to the majority of Eastbourne centres assessed in this report, and alongside the environmental quality and relatively low vacancy rate indicates that the centre is relatively healthy and performing well from a commercial perspective.

Carlisle Road (Meads)

Carlisle Road (Meads) is a short retail parade along Carlisle Road comprising seven retail units, and when the parade of shops opposite – that we have proposed to include within an updated boundary – is included, there is a total of 17 units.

There are no vacancies within our proposed boundary allocation, and historically when businesses have vacated space in this centre they have been quickly replaced, meaning vacancy rates have consistently remained very low.

This centre contains a number of high quality, well maintained attractive period retail properties just outside of the Eastbourne Town Centre boundary. There are period appropriate street lights which are a subtle environmental enhancement to the street.

Rents are at the upper end of the typical rent spectrum for the majority of Eastbourne centres assessed in this report, and coupled with other analysis of this centre clearly indicates it is healthy and performing well from a commercial perspective.

St. Anthony's (Winston Crescent, Including Lidl)

St Anthony's (Winston Crescent, Including Lidl) comprises twelve retail units and is situated on a small crescent away from a main road running south west to north east outwards from Eastbourne town centre. The remainder of the centre is a single Lidl with a large, dedicated off-street car park to the north of the crescent. There are currently no vacant units.

Market rents are similar to the majority of Eastbourne centres assessed in this report, indicating the centre is relatively healthy and performing well from a commercial perspective.

Cavendish Place (Town Centre)

Cavendish Place currently sits within the boundary of Eastbourne Town Centre, although it is evidently a distinct centre in its own right as there is clear separation created by several residential roads between it and Eastbourne's retail provision.

The street itself is clear and open, predominantly bound by residential on its western town centre edge. It contains a relatively even mix of comparison, convenience, retail services and leisure uses, with those shops generally clearly set up to serve the local community rather than to attract customers from Eastbourne town centre; all are small, independent businesses and there are no national multiples.

Rents are lower than the average within this report, indicating this centre slightly less desirable to prospective tenants relative to other Eastbourne centres.

Retail Capacity Forecasts & Implications

Our capacity forecasts represent the ‘baseline’ scenario for new retail floorspace in Eastbourne Borough, in which we assume that the 2022 survey-derived pattern of market shares of convenience and comparison goods expenditure, in each of the Borough’s shopping destinations, remains unchanged throughout the forecasting period.

The table below shows our individual capacity forecasts for convenience goods floorspace in the shopping destinations modelled, together with our overall (i.e. combined) forecasts for the Borough, which rise from ‘negative’ capacity in 2025 to about 400 sqm net sales area by the end of the plan period (albeit such longer term forecasts should be treated with a degree of caution). Where limited expenditure-based capacity has been identified, the sequential approach should be applied, with such capacity having the potential to support the improvement and/or replacement of existing foodstore provision; or change of use proposals for small convenience goods shops.

Figure 104 – Summary of capacity forecasts: convenience goods (sqm net sales area)

| | 2025 | 2030 | 2035 | 2040 | Table number (Appendix [x]) |
|--|--------|------|------|------|--------------------------------|
| Eastbourne Town Centre | -800 | -650 | -550 | -550 | 13A |
| District Shopping Centres in Eastbourne Borough | -700 | -400 | -300 | -250 | 22A |
| Local & Neighbourhood Shopping Centres in Eastbourne Borough | 350 | 450 | 500 | 500 | 28A |
| Non-central stores in Eastbourne Borough | 0 | 400 | 600 | 700 | 37A |
| Combined forecasts for Eastbourne Borough | -1,150 | -200 | 250 | 400 | |

Notes:

- a) *The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.*
- b) *Forecasts rounded to the nearest 50 sqm net.*

The position in respect of comparison goods floorspace is even more ‘negative’ (in capacity terms) with our forecasts, set out in the table below, indicating a substantial theoretical over-supply across Eastbourne Borough from 2025 onwards. This is broadly consistent with market trends and a reduction in retailer demand.

Figure 105 – Summary of capacity forecasts: comparison goods (sqm net sales area)

| | 2025 | 2030 | 2035 | 2040 | Table number (Appendix [x]) |
|---|--------|--------|--------|--------|--------------------------------|
| Eastbourne Town Centre | -200 | -950 | -1,450 | -2,250 | 13A |
| District Shopping Centres in Eastbourne Borough | -3,350 | -3,650 | -3,850 | -4,150 | 22A |
| Non-central stores in Eastbourne Borough | -1,200 | -1,600 | -1,850 | -2,200 | 37A |
| Combined forecasts for Eastbourne Borough | -4,750 | -6,200 | -7,150 | -8,600 | |

Notes:

- a) *The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.*
- b) *Forecasts rounded to the nearest 50 sqm net.*
- c) *Local & Neighbourhood Shopping Centres in Eastbourne Borough not modelled.*

The retail capacity forecasts serve as a guide for future planning policies and decisions on planning applications. The forecasts should be reviewed regularly in the light of actual population and (in particular) expenditure growth, the outlook for which is subject to change given macro-economic conditions.

We are aware that the Council’s Eastbourne Land Availability Assessment 2022 identifies ‘Land adjoining the Railway Station and the Enterprise Centre’ (site ref. TO55) as capable of accommodating around 5,000 sqm of retail floorspace in addition to 3,000 sqm as part of an extension to the Enterprise Centre. It is unclear whether this substantial quantum of new retail floorspace would be viable and deliverable as part of wider mixed-use development. In reality, should proposals come forward on this site allocation, these are likely to comprise Class E / flexible commercial floorspace at ground floor level. Any retail is likely to be supported in expenditure terms by attracting market share from existing retail floorspace in the Town Centre but, depending on its scale and nature, also has the potential to ‘clawback’ retail expenditure currently lost to competing shopping destinations.

Commercial Leisure Needs

This Study has set out how commercial leisure uses and activities (and non-commercial e.g. theatres, galleries, museums) play an important role in contributing to the vitality and viability of the Borough’s centres, in particular Eastbourne Town Centre as the main visitor and evening economy destination.

User satisfaction with the Town Centre’s F&B offer appears to be high and the scale of any future growth (which should be supported in principle to attract visitors and extend the hours of activity) will largely be dependent on market demand. We consider that existing vacant units and/or large units in need of reconfiguration and modernisation – or indeed redevelopment (such as the former Debenhams and TJ Hughes department stores which are earmarked for residential-led redevelopment with flexible commercial space at ground floor level) – provide sufficient opportunities for any future needs to be met. There also appears to be physical capacity to provide further F&B (and other forms of commercial leisure) at The Beacon as part of the continued ‘beyond retail’ diversification of the shopping centre.

Eastbourne Town Centre’s more specialist F&B options, including the street food traders and other local independent businesses on Food Street / Victoria Place and Grove Road (Little Chelsea), are an important asset for the wider town centre experience and economy – and should be promoted and built upon. Significantly, these serve to improve the sense of place and independence and broaden the range and quality of catering themes available, at a time when all centres need to be more distinguished and more multi-purpose in their offer, use and experience.

For the Borough’s smaller centres, existing units are likely to meet demand for new commercial leisure provision including F&B, as and when suitable units become available.

Eastbourne Town Centre’s wider commercial leisure offer includes the Cineworld multiplex cinema and Leo Leisure Bingo Club. We do not consider there is a need for EBC to plan for any additional commercial leisure development (including cinemas, bingo/ casino, ten-pin bowling, trampoline parks, and gyms and health & fitness facilities). In the longer term,

as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such proposals should be subject to the ‘town centres first’ sequential approach. Larger format uses should be focused in Eastbourne Town Centre as a priority given its position in the retail hierarchy.

Policy Recommendations

In accordance with our instructions, we critically review and consider below whether relevant policies set out in the development plan for Eastbourne Borough are fit-for-purpose, or whether any policy revisions and/or additional provisions are necessary to ensure the emerging Local Plan reflects the updated evidence base and is consistent with the NPPF. We have also undertaken a review of the Borough’s town centre boundaries and primary shopping areas.

Our review is focused on the following policies:

- *Eastbourne Borough Plan (2003) ‘Saved’ Policies:*
 - o Policy SH2 (Business Uses Outside the Retail Hierarchy)
 - o Policy SH6 (New Local Convenience Stores)
 - o Policy SH7 (District, Local and Neighbourhood Centres)
- *Eastbourne Core Strategy (2013) Policies:*
 - o Policy D4 (Shopping) including the Borough’s retail hierarchy
- *Eastbourne Town Centre Local Plan (2013) Policies:*
 - o Policy TS3 (Mixed Use Development)
 - o Policy TS4 (Primary Retail Areas)
 - o Policy TS5 (Secondary Retail Areas)
 - o Policy TS7 (Supporting the Evening and Night-time Economy)

Starting with **Policy D4**, which sets out the Council’s overarching approach to retail development in Eastbourne Borough, the policy defines a four-tier retail hierarchy:

- i. Eastbourne Town Centre;
- ii. District Shopping Centres (DSC);
- iii. Local Shopping Centres (LSC); and
- iv. Neighbourhood Shopping Centres (NSC).

As an approach, this is consistent with the NPPF (paragraph 86a) requirement that planning policies should *define a network and hierarchy of town centres*. Town centres are defined as:

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

Based on the findings of the updated evidence base, in particular the healthcheck assessments, we consider it remains appropriate to:

- identify Eastbourne Town Centre at the apex of the retail hierarchy, reflecting and promoting its role as the principal focus for comparison goods shopping, services, leisure and other commercial activity in the Borough; and
- maintain the existing network of centres within the DSC and LSC tiers of the retail hierarchy, recognising that the District Shopping Centres are generally larger and comprise a broader mix of uses and/or multiple retailer representation, and therefore tend to serve a relatively wider function.

In respect of NSCs, EBC should consider simplifying the retail hierarchy by re-classifying NSCs as ‘Local Shopping Centres’ given their broadly comparable scale and functions serving the day-to-day needs of local residents. As a minimum, we would recommend that St Anthony’s (Winston Crescent) NSC is classified as a Local Shopping Centre given its accessibility and representation by Lidl, which sets it apart from other Neighbourhood Shopping Centres and ensures it performs a main food shopping function.

Policy D4 also outlines the requirements of the sequential and impact tests set out in the NPPF, as relevant when assessing planning applications *for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan (for sequential test purposes) or for retail and leisure development outside town centres, which are not in accordance with an up-to-date local plan (for impact test purposes).*

With regards to the sequential test, Policy D4 applies the sequential approach to site selection in the following order of preference:

- Eastbourne Town Centre Primary and Secondary Shopping Areas;
- District Shopping Centres;
- Local Shopping Centres;
- Neighbourhood Shopping Centres;
- Edge-of-centres; and
- Out-of-centre sites, which are accessible by a choice of transport means.

This policy approach was the subject of a High Court Judgement¹⁶ and found to be *not unlawful*. However, the Judgement observed that the approach is *perhaps a little odd* and we would agree that conflating matters of hierarchy with the application of the sequential test can be problematic. Although matters of hierarchy (and scale and function) are clearly relevant considerations when assessing proposals for main town centre uses, such considerations generally apply to proposals in or on the edge of a centre. Moreover, the approach in Policy D4 goes beyond the requirements of the NPPF (paragraph 87) insofar as the position of each centre in the Borough’s retail hierarchy is of no relevance to the sequential test. The test only recognises ‘town centres’ which (as set out previously) include city/ town/ district/ local centres defined on the local authority’s policies map.

We therefore recommend that EBC removes the retail hierarchy tiers from new policy addressing the sequential test, instead making it clear that the preferred location for main town centres uses is the Borough’s existing centres, *then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered* in accordance with the NPPF (paragraph 87). Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale when applying the sequential test, as the NPPF (paragraph 88) requires.

New policy should, however, maintain the need to assess proposals for main town centre uses *by reference to the retail hierarchy, and, in particular, by reference to the question of whether the proposed development [is] of a scale and function that better [suits] a centre further up the hierarchy*¹⁷. We note that neither Policy D4 nor the wider development plan set out definitions of centres at each tier of the retail hierarchy, in terms of their existing (and/or intended) role and function within that hierarchy. EBC should consider this as part of the Local Plan review, to encourage proposals for main town centre uses in or on the edge of a centre to be of a type and scale appropriate to the role and function of the centre and complementary to its overall vitality and viability.

With regards to the impact test, to ensure consistency with the NPPF (paragraphs 90 and 91), new policy should make it clear that relevant applications for retail and leisure development should not have a significant adverse impact on one or more of the following considerations:

- a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

¹⁶ Judicial Review of the Eastbourne Core Strategy Policy D4: Case Number CO/3663/13 [2014] EWHC.

¹⁷ Paragraph 38 of the High Court Judgement relating to Policy D4.

Furthermore, the NPPF (paragraph 90) makes it clear that the impact test only applies to proposals over 2,500 sqm gross unless there is a different proportionate, locally set floorspace threshold. The current development plan for Eastbourne Borough does not set its own floorspace threshold for such purposes. However, in the interests of ensuring the vitality and viability of its network of centres, we recommend that EBC reconsiders this as part of the Local Plan review process to ensure the local planning authority can assess and control the impact of proposed new retail and leisure development outside the existing centres (including changes of uses and applications to extend existing facilities).

Accordingly, we consider the NPPF 'default' floorspace threshold of 2,500 sqm gross is inappropriate for Eastbourne Borough, including because this scale of development would far exceed the retail capacity forecasts for the shopping destinations modelled. This floorspace threshold is also substantial in relation to the Borough's smaller centres, where competing new development much smaller than 2,500 sqm gross could potentially have a significant adverse impact on their vitality and viability. A reduced threshold of 500 sqm gross would therefore be appropriate in relation to Class E(a) retail development proposals.

For leisure development proposals – including Class E(b) food and drink, Class E(d) indoor sport and recreation, and 'sui generis' F&B and cinemas – a locally set floorspace threshold of 500 sqm gross is also considered appropriate.

If this approach to locally set floorspace thresholds is adopted for the purpose of impact testing, then policy should make it clear that impact assessments should be proportionate to the scale and nature of retail and/or leisure development proposed, as indicated by the PPG (paragraph 017) which states:

The impact test will need to be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible. Ideally, applicants and local planning authorities should seek to agree the scope, key impacts for assessment, and level of detail required in advance of applications being submitted.

Our recommended threshold for Class E(a) retail development proposals ties in with Policy SH6, which supports new local convenience stores of no greater than 500 sqm gross outside of the Borough's existing centres, *where it can be satisfactorily demonstrated that there is a need for such a facility* (emphasis added). Need is no longer a national policy test, and therefore this provision is out-of-date. Proposals of that nature – like all retail and leisure development proposals – should be subject to the sequential test and (where necessary) the impact test; in addition to any other relevant policies of the new Local Plan.

Policies TS4 and TS5 set out the Council's policy approach for dealing with applications for non-retail uses within Eastbourne Town Centre's primary and secondary retail areas/frontages which, combined, represent the de facto 'primary shopping area' in the terms of the NPPF. Aside from the out-of-date policy references to Use Classes A1-A4, the NPPF no longer requires primary shopping areas to comprise primary and secondary frontages. This corresponds with the changes to the Use Classes Order – including Class E encompassing retail, commercial, business and service uses – which provides greater flexibility for changes of use in town centre locations. In this context, some of the wording in Policy TS4 (e.g. "Use Classes A2, A3 and A4 will only be permitted at ground floor level where it would result in no more than 25% of the overall retail frontages being in non-retail use") – and in Policy TS5 – is overly restrictive and fails to recognise that non-retail uses, such as commercial leisure, community and cultural facilities, play an important role supporting town centre vitality and viability as this Study has discussed.

Although the NPPF does not preclude planning policies from defining primary and secondary shopping frontages, we are of the view that frontage designations (and associated change of use policies) would be counter-productive and weaken the Town Centre's ability to adapt and deliver a broader range of uses to support its main retail function. Moreover, the operation of this type of policy approach would be affected by the 'new' Class E and, in any event, there is increasing emphasis at the plan-making (and decision-making) stage on qualitative-based assessment factors, focusing on (for example) the nature and character of a proposed use or development, including the level of activity associated with it, and its contribution to the frontage and the overall health of the centre.

In addition, we recommend the new Local Plan does not seek to protect larger retail units in Eastbourne Town Centre (as Policy D4 sets out i.e. "Protecting larger units – particularly in the primary shopping frontages – from subdivision or change of use"). Such protection could have unintended consequences amid the lack of high street retailers with large format requirements; and would be counter to a growing trend of larger units being reconfigured or split into smaller units for let. Former department stores are a good example of this, as highlighted in section 3 of this report.

Policy SH7 concerns retail to non-retail change of use proposals within the Borough's district, local and neighbourhood shopping centres. This policy is more flexible than the provisions of TS4 and TS5 on the basis it outlines a series of qualitative assessment criteria (as opposed to rigid % thresholds for the protection of retail frontages) which enable the decision-maker to reach a more rounded judgement on a proposal's effect on the vitality and viability of the centre. That

said, it still requires A1 retail uses to predominate within a centre which, as mentioned previously, is increasingly outdated and not entirely compatible with the changes to the Use Classes Order.

Policy SH2 supports change of use proposals from class A1, A2 or A3 uses to class B1 or D1 uses outside of the Borough's centres. Notwithstanding these use classes do not reflect the latest Use Classes Order, the policy further allows for *conversion or redevelopment to residential use where it can be demonstrated that premises have been marketed for both retail or business use without interest, at a price that reflects local market prices*. We would recommend the new Local Plan continues to support the release of 'non-central' retail and retail service premises for alternative, location-appropriate uses (including residential) in order to promote existing centres as the priority focus for retail, food and drink, and other complementary main town centre uses.

However, considering the terms of the sequential test, we would question the appropriateness of a policy approach that requires 'non-central' retail premises to be marketed (without interest) before they can be released for conversion or redevelopment to residential use. New policy should, in our view, exclude a marketing test of this nature.

Policy TS3 promotes mixed use developments and a mix of uses in Eastbourne Town Centre *with priority to retail uses, leisure and cultural uses, employment generating uses (particularly offices), residential, supporting community uses, and evening and night-time economy uses including cafes, restaurants and bars*. **Policy TS7** specifically supports the evening and night-time economy in the Town Centre.

We consider these policies (TS3 and TS7) remain broadly fit-for-purpose in the light of the updated evidence base and are consistent with the NPPF, which (at paragraph 86a) intends for town centres to *grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing)...* and (at paragraph 86b) *makes clear the range of uses permitted in such locations*.

Turning to the NPPF (paragraph 86d) requirement for planning policies to *allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead*, this Study has assessed the 'need' for new retail and commercial leisure floorspace.

Our retail capacity forecasts indicate a substantial theoretical over-supply of comparison goods floorspace across Eastbourne Borough from 2025 onwards. Although we have identified limited capacity for additional convenience goods floorspace in some of the shopping destinations modelled, the picture in respect of such floorspace 'needs' for the Borough as a whole is also negative until later in the plan period. As such – and recognising that longer-term capacity forecasts should be treated with a degree of caution – there should be no requirement to forward plan for new retail development, except for supporting the continued retail function of the primary shopping areas by promoting the delivery of complementary uses and footfall-generating attractions.

With regards to commercial leisure provision, there is no reliable method for assessing needs in quantitative terms and for this reason alone we would caution against setting floorspace requirements. Instead, Local Plan policy should be focused on supporting the enhancement of F&B provision and the evening economy in Eastbourne Town Centre through appropriate changes of use and proposals involving the reconfiguration and modernisation of vacant larger units.

A similar approach should be followed for the Borough's smaller centres, where existing units are likely to meet any future leisure (and retail) needs, as and when suitable units become available.

Town Centre Boundaries & Primary Shopping Areas

Section 8 of this report describes our recommended approach to defining town centre boundaries and primary shopping areas in the Borough, and Appendix iv sets out the changes that we propose for each centre.

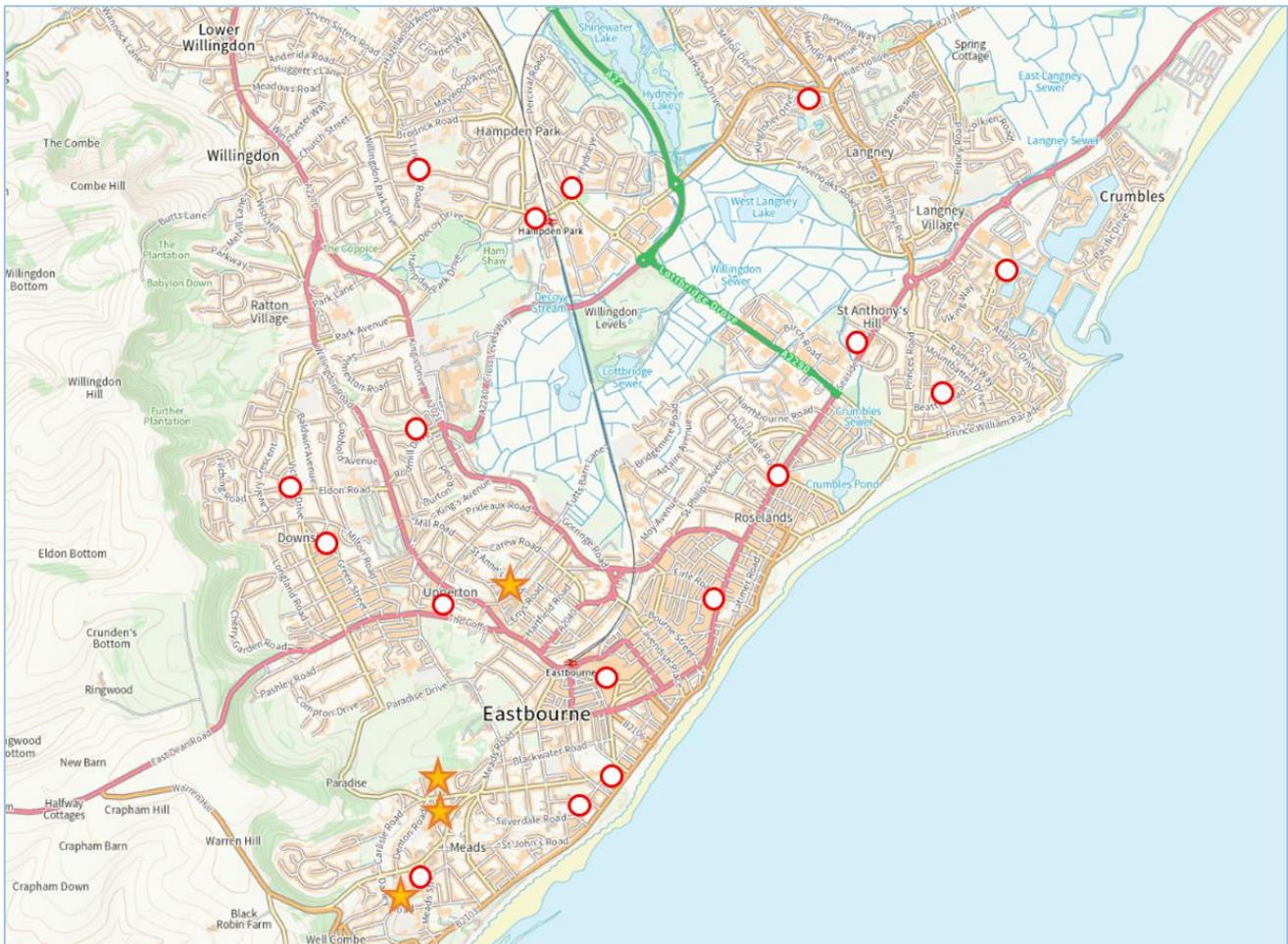
10. SCENARIO ASSESSMENTS

University of Brighton Departure from Eastbourne

This section of the report will seek to assess the impact of the University of Brighton (UoB)'s proposal to vacate their Eastbourne campus and move it to Falmer by the start of the 2024-25 academic year, which will also see the closure of the Leaf Hospital at the same time. The University currently has approximately 1,500 people in full time education at the Eastbourne Campus.

Figure 106 depicts the location of the various campus buildings and the Leaf Hospital in relation to the various town centres assessed within this report.

Figure 106 – University of Brighton Campus Location



As this map demonstrates, the campus is situated in Meads, and is only in close proximity to one of the centres assessed within the report, Meads Street. The campus is approximately 1.2 miles south west of Eastbourne Town Centre, in a location that is very different from the town centre itself, as it predominantly comprises lower-density housing, and has a far less dedicated or large retail provision.

There are two basic scenarios that one may draw from this context:

- The campus is adequately served by the Meads Street centre, meaning whilst the impact of the campus being vacated might be high within that centre directly, the overall impact for Eastbourne is somewhat lower as it is in effect insulated by its distance from the campus.
- The campus is not adequately served by the Meads Street centre (or users choose not to shop/ visit there), meaning a proportion of those students and staff visiting the campus will regularly shop/ visit elsewhere in Eastbourne, and therefore the impact of the loss of the campus will be felt elsewhere in the town.

In reality, the impact of the campus vacating Eastbourne is likely to fall somewhere between these two scenarios, with Meads Street and Eastbourne Town Centre both feeling a proportion of the impact.

It is important to note that – through the analysis contained within this report – we know that Eastbourne Town Centre has a significantly larger catchment area than its surrounding centres, as well as having a rail station and lots of parking, and thus it is reasonable to assume if students and employees of the University campus are visiting somewhere other than Meads Street, it will be the town centre. This means – regardless of which scenario listed above is correct – the impact to many of the smaller centres (except Meads Street) is unlikely to be high.

The major questions therefore surround the importance of that impact, which will change depending on where – out of the two listed centres – it is most keenly felt.

The Prospectus for Change Consultation Summary of Responses (December 2021) states that the University and associated student expenditure make a significant contribution to the Eastbourne economy, estimating that the University's withdrawal from the town would equate to a loss of c. £1.5 million in spending annually. When compared with the income of the principal industry for the town – tourism – which as of 2015 was £388 million annually. This is a relatively small loss, and one that is likely to be replaced by other investment in the town; in particular the Levelling Up Fund investments that are covered below.

However, given its small size, it is reasonable to assume loss of even a small proportion of this figure annually will have a severe impact on the Meads Street centre's ability to continue to support its current levels of retail provision viably moving forwards.

In terms of longer term impact, the Consultation Summary of Responses also states the loss of the University campus will result in a loss of future skills to the Eastbourne community. Whilst the impact on skills levels has not been quantified, this presents a potential threat to the vitality of the town longer term.

If fewer people are either receiving higher education in Eastbourne and then choosing to remain in the town, or are hailing from Eastbourne and receiving said higher education, this is likely to reduce the number of people obtaining higher paid graduate jobs, this will theoretically negatively impact expenditure levels in the town in the future.

However, the annual number of full time students at the Eastbourne campus is stated by UoB to be approximately 1,500. Even assuming a high proportion – 50% of students – hail from Eastbourne, this is significantly below 1% of the total population of Eastbourne in 2021, according to ONS data. As such, whilst the individual impact on those students who are no longer able to study at the University will likely be very high, the overall long-term economic impact to Eastbourne is unlikely to be of great significance.

The campus leaving the town may also be felt from a healthcare provision and expenditure perspective. The Summary of Responses (December 2021) noted the real concern that the closure of the Leaf Hospital would affect the long term future of the Podiatry course, and thus impact on primary and secondary care, with fewer patients being registered with local practices in Eastbourne.

If there was a significant proposed development pipeline for other NHS facilities within the town, any additional requirement caused by the need to replace this provision could prove burdensome as it would be adding to an already challenging pipeline. As such, we have checked the Eastbourne Local Plan Infrastructure Development Plan for 2014, which is the most recent available document, and which shows there are minimal healthcare development requirements for the town, with two GP surgeries needing relocation. This in theory reduces the pressure on the town should the Leaf Hospital need to be replaced either on site or elsewhere within the town.

It is of course notable that there will be an opportunity to redevelop the vacated site to mitigate the adverse impact of the University of Brighton leaving Eastbourne, however it is our understanding that as it stands the site is not allocated within any planning documents.

Impacts of Levelling Up Fund Project Delivery

The Levelling Up Fund (LUF) is a Government funding package to be invested in high value local infrastructure with the intention of building stronger and more resilient local economies and communities. Eastbourne Borough Council bid for £19.8m from the Fund, and in October 2021 the Government verified that the Council's bid was successful and the full funding amount would be provided.

Three main proposals were the basis of this bid, as follows:

- Improvements to and regeneration of Victoria Place

- Upgrades to the Towner Gallery to celebrate its centenary
- Creation of a cultural centre at Black Robin Farm.

At a high level, the stated benefits of the Levelling Up Fund investment were as follows:

- 5,155 visitor nights from overseas tourists per year,
- 8,615 visitor nights from domestic tourism per year,
- 23,250 day visits per year,
- £2.19 million tourism spend per year.

We have provided a more detailed description of the three proposals, and how these interventions will benefit the town, below.

Victoria Place

The proposal for Victoria Place is a continuation of the Eastbourne Town Centre Movement and Access Package, included pedestrian, public transport and public realm improvements along Terminus Road, Cornfield Road and Gildredge Road to support the expansion of The Beacon Shopping Centre.

Eastbourne Borough Council has allocated £7.623 million of the LUF money to a number of public realm and access improvements with the stated intention of converting Victoria Place into a vibrant, pedestrianised cultural district. Such changes will include:

- Improvements to the pedestrian experience, enhancement of the public realm, and new green energy infrastructure, with awnings, lighting and heating, with the intention of creating a more vibrant night-time economy for the town and cohesively linking the seafront to the town centre.
- Creation of 17 refurbished commercial units for new independent food and drink businesses, providing new jobs and work placement opportunities.

These proposals appear to be well-targeted towards improving some of Eastbourne's weaknesses in the town centre, many of which were identified within our town centre health check above. Namely in the "Terminus Road: Former Debenhams Building to the Seafront" character area which has high vacancy rates, is slightly aesthetically tired and so is one of the lower-quality parts of the town centre in spite of its strong location between the town centre and the Seafront.

Additionally, whilst Eastbourne Town Centre does have a good provision of leisure, much of it does not help to create a night time economy for the town as it predominantly comprises takeaways and fast food; with these interventions, this weakness for the town should be solved, increasing its appeal to both local and tourist visitors, providing a further boost to the local economy.

Towner Centenary

The proposal for the Towner Gallery will see £1.037 million LUF investment into the Towner's Centenary project. This funding will be used to:

- Create a number of public artworks across the town that will provide an arts trail connecting the Seafront, Town Centre and South Downs National Park.
- Enhance gallery facilities to support the education and outreach programmes that will engage strongly with some of Eastbourne's most disadvantaged communities.
- Undertake capital improvement works to the top floor facilities at the gallery in anticipation of significantly increased audiences throughout the year - in particular to support the hosting of Turner Prize 2023

The Towner Gallery is one of the principal cultural attractions to the town, and as highlighted above in 2023 the gallery is hosting the Turner Prize; one of the most prestigious of British art awards. Given the cultural weight of the festival across the UK as well as further afield, we would anticipate the event taking place in Eastbourne will significantly increase visits to the town. As such, the c. £1 million required to prepare the town and in particular the gallery for this event is likely to be good value for money in terms of the long-term increase in visits to, and there're expenditure within, Eastbourne.

Black Robin Farm

The Black Robin Farm LUF project will see £11.186 million spent to create a world-class culture and education centre in collaboration with the Towner Gallery at a former dairy farm in the South Downs, connecting the national park with the Town Centre and Seafront, and providing a new destination for c.100,000 visitors per year. This is a significant annual increase in the number of visitors to a town that relies heavily on its tourism industry.

In addition to the tourism aspect of the Black Robin Farm proposal, the farm will provide high quality commercial space for 16 new start-up businesses in the creative and cultural sectors, potentially helping to diversify the town's economy longer term. Linking this to a successful existing business within the town – in this case the Towner Gallery – increases the chance that the commercial space will be successful, albeit there is still risk associated with these units as the office/commercial space within the town is limited, and therefore the number of businesses looking for space in the town will be limited¹⁸, meaning finding tenants may be difficult as the market becomes more established.

Conclusion

As stated in the introduction, the Levelling Up Fund bid calculated the benefits to Eastbourne of the funded works as being:

- 5,155 visitor nights from overseas tourists per year,
- 8,615 visitor nights from domestic tourism per year,
- 23,250 day visits per year,
- £2.19 million tourism spend per year.

Whilst this is a relatively small increase in the number of visitors to the town relative to annual visitors (which was estimated at c.5 million visitors per annum in the Levelling Up Fund bid document) it is investment in the quality of both the urban environment of the town as well as the leisure/ cultural activities available within the town. Such investment will have wider-ranging impacts than just tourist visitor numbers and expenditure, for example by making Eastbourne more attractive to home buyers, or increasing the number of high-quality retailers that want to be based in the town, all of which have their own – very tangible – effects on the economic prosperity of a town/ city.

We would expect these investments to have their principal positive impacts in different parts of the town centre, in part due to where the investment is targeted towards, however with the Towner and Black Robin Farm, these positives should be further reaching than just the area surrounding the projects:

- The Victoria Place investments will likely have their main positive impacts within Eastbourne town centre as they are built environment enhancements with a very pointed purpose – namely improving the town centre retail area. Whilst the increased footfall/ number of visitors to the town may have a small impact elsewhere in Eastbourne, we would expect the majority of the benefits to be concentrated centrally.
- The Towner Centenary investments will similarly likely be mostly felt in the town centre as they generate increased visitor numbers and footfall in a relatively central location. The reason the effect might be felt outside the town centre is because the Towner Gallery is located slightly outside the Eastbourne Town Centre boundary, meaning visitors will be travelling close to nearby centres such as Grand Hotel Buildings (Meads) and Carlisle Road (Meads).
- The Black Robin Farm project is outside of Eastbourne, and west of Meads on the edge of the South Downs. Its main stipulated benefit within the LUF bid documents is that it is expected to generate 100,000 additional visitors per annum for the town through its art/ educational function and holiday homes. There is likely to be some interaction with the Town Centre by virtue of its position as the main leisure and retail space in the region, and as with the Towner Centenary works there is likely to be some influence in Grand Hotel Buildings (Meads) and Carlisle Road (Meads) due to their location near the gallery.

As stated above, it is our view that these investments are well directed towards either addressing some of the weaknesses, or building on the strengths, of Eastbourne. As such, we would expect them to contribute positively to the overall town, both as a retail and cultural destination for visitors from the town's surrounds and further afield.

¹⁸ This is covered in more detail in the Office Market section above

