Lewes District Shopping and Town Centres Study

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Prepared by

GL Hearn Limited
20 Soho Square
London W1D 3QW

T +44 (0)20 7851 4900
F +44 (0)20 7851 4910
glhearn.com

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DATE	ORIGINATORS	APPROVED
May 2012	Cathy Hall Planning Associate Director	Andrew Jackson Planning Director

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1. INTRODUCTION

1.1 GL Hearn was instructed by Lewes District Council in November 2011 to undertake a district-wide shopping and town centres study assessing the District's main shopping and smaller village/rural centres. The purpose of the study is to inform and guide retail planning and development in the District and to form a robust evidence base for the preparation of the Council's Local Development Framework Core Strategy.

1.2 Whilst commissioned by Lewes District Council, the Shopping and Town Centres Study is prepared for both the District Council and the South Downs National Park Authority.

1.3 The specification of the Shopping and Town Centres Study was set out in the Council's Brief (**Appendix 1**) and the primary purpose of the study was identified as:

a) Fully understand how the local shopping market operates in order to assess each centre's expected economic growth, or decline;

b) Assess the overall need for new floorspace for comparison, convenience and service trade shopping uses in each town centre, taking account of qualitative and quantitative factors commensurate with the promotion of the vitality and viability of the town centre. Also to identify any need for new bulky goods floorspace;

c) Identify deficiencies or gaps in the provision in each town and assess the capacity of existing centres to accommodate new development, including the need for extending the town centres and to identify centres which may need consolidation;

d) Analyse the various shopping sectors (including national multiples and independent shops) to provide information on the shopping mix that is required in any new development;

e) Identify potential sites to accommodate any needs arising, in the context of the sequential test, environmental constraints and the need for sites to be commercially viable and deliverable when required. This would include any out-of-centre sites where there are inadequate opportunities in or on the edge of an existing town centre.

f) Assess the accessibility of the town centres by transport modes other than the private car and any present or future economic implications;

g) Assess the accessibility of the town centres by private car, including car parking and any future economic implications;

h) Assess where deficiencies exist in the provision of local convenience shopping (i.e local shops and village shops) and other facilities which serve the day to day needs;

i) Identify the shopping hierarchy of the District;

j) Provide baseline statistics for the annual monitoring of shopping floorspace and to provide information for use in subsequent monitoring reports; and

k) Review and assess the policy recommendations in the 2005 Lewes Retail Study, with regard to changes in economic policy and circumstances since that time, and provide updated policy recommendations for the period 2011 to 2030 or provide justification if it is appropriate for the policy recommendations to remain the same.

1.4 To address the requirements of the Brief, our Study incorporates a comprehensive up to date review of retailing within the District utilising a specifically commissioned household telephone questionnaire survey examining the shopping patterns of the Districts residents (**Appendix 2**). This provides an evidential base to the shopping analysis and an indication of the relative roles of the Districts town centres and other shopping facilities. The household telephone survey results have been supplemented by information gathered at a retailer and town centre stakeholder meeting where representatives for each of the main Lewes centres were present.

1.5 In addition, we have also had regard to the analysis within and findings of the previous 2005 Lewes Retail Study and other relevant retail and economic strategy documents prepared by and on behalf of the District Council. The retail and town centre strategies of adjoining districts have also been examined.

1.6 Primary research and town centre surveys have been carried out by GL Hearn for the District's main shopping centres of Lewes, Seaford, Newhaven, Peacehaven (Meridian Centre) and Peacehaven (Telscombe Cliffs/South Coast Road). Visits have also been made to smaller village centres and out of centre retail facilities within the District. The quantitative and qualitative information gathered has been utilised in the preparation of health checks for the main town centres and has fed into the retail capacity and need analysis.

1.7 We would acknowledge the assistance provided by Officers at Lewes DC, Brian Harrison consultant to Lewes DC and those who attended the retailer/stakeholder event.

2. RETAIL AND TOWN CENTRE PLANNING POLICY

2.1 In this section, we provide an overview of the planning policy focused primarily upon retailing and town centres matters. These policies comprise the policy framework within which development plans are to be prepared and planning applications should be decided.

National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF) was published on 27 March 2012 and, with immediate effect replaces, the suite of existing PPGs and PPSs, including PPS4.

2.3 The NPPF provides the Government's planning policies for England, providing a national framework for the planning system only as far as it is relevant proportionate and necessary to do so. The Policy Framework must be taken into account in preparing local and neighbourhood plans and is a material consideration in planning decisions.

2.4 Achieving sustainable development is regarded by Government as the overarching purpose of the planning system. Sustainable development is seen as having three inter-related and mutually dependent dimensions:

- An economic role – a strong, responsive and competitive economy with the planning system supporting growth and innovation.
- A social role – with strong and vibrant communities provided with housing, a high quality built environment and accessible local services to meet community needs.
- An environmental role – protecting and enhancing natural, built and historic environments whilst improving upon use of scarce natural resources and addressing climate change and the need for a low carbon economy

2.5 In order to achieve sustainable development, the environmental, social and economic aspects should be jointly considered by the planning system which is seen by the Government as having an active role in guiding development to achieve sustainable solutions. In order to achieve this plans and decisions need to have regard to local circumstances in order to be responsive to and balance different and often conflicting opportunities.

2.6 The NPPF has at its heart a presumption in favour of sustainable development. The NPPF is explicit in advising that plan policies should follow this guiding principle and should set out how this presumption should be applied locally.

2.7 The extract from the NPPF (para. 14) sets out this presumption in favour of sustainable development.

14. At the heart of the National Planning Policy Framework is a **presumption in favour of sustainable development**, which should be seen as a golden thread running through both plan-making and decision-taking.

For **plan-making** this means that:

- local planning authorities should positively seek opportunities to meet the development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted.[9]

For **decision-taking** this means:[10]

- approving development proposals that accord with the development plan without delay; and
- where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted.[9]

2.8 The NPPF sets out 12 core land use planning principles that should underpin plan-making and decision-taking. These 'core planning principles' are outlined at paragraph 17 and comprise:

- Genuinely plan-led;
- Not based on scrutiny, but instead a creative exercise to enhance and improve places;
- Objectively drive and support sustainable economic development;
- Secure high quality design;
- Have regard to different roles and character of different areas;
- Support low carbon and use of renewable resources;
- Conserving and enhancing the natural environment and reducing pollution;
- Encourage the reuse of previously developed land;
- Promote mixed use developments;
- Conserve heritage assets;
- Manage growth for the fullest possible use of non-private car modes of travel; and

- Deliver sufficient community and cultural facilities and services.

2.9 With regard to retailing and town centres, the NPPF sets out at paragraph 23 that planning policies should positively promote competitive town centres and provide for the management and growth of centres over the plan period. When preparing local plans, authorities are required to take account of:

- Town centres being the heart of communities and promoting their vitality and viability;
- Define a hierarchy of centres which will be resilient to future economic changes;
- Define town centre and primary shopping area boundaries and set policies which make clear the uses which will be permitted in such locations;
- Promote competitive and diverse town centres which also reflect a centres individuality;
- Recognise the importance of markets;
- Allocate sites to meet the needs for retail, leisure, commercial, office, tourism, cultural, community and residential development. This requires an assessment of the need to expand town centres to ensure sufficient supply of sites;
- Adopt a sequential approach to site identification where there are no suitable and viable sites available;
- Set policies to consider proposals for town centre uses which cannot be accommodated in-centre;
- Recognise that and encourage residential development as a being important in ensuring the vitality of town centres;
- Plan positively to deal with town centres which are in decline.

2.10 Paragraphs 24 to 27 of the NPPF sets out the matters to be considered in the determination of planning applications for main town centre uses, including retail.

2.11 In summary: paragraph 24 sets out the principles of the sequential test; paragraph 26 covers the requirement for impact assessments; and paragraph 27 provides that where applications do not satisfy the sequential and impact tests, they should be refused.

2.12 **Sequential test** - Paragraph 24 directs local planning authorities to apply a sequential test to planning applications. In effect, this direction carries over the guidance set out in PPS4 Policy EC15.

2.13 **Impact assessment** - Paragraph 26 sets a default threshold for impact assessments being required for applications in excess of the 2,500 sqm. The impact assessment should include assessment of:

- '*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*' This carries over the requirements set out in the now-revoked PPS4 Policy EC16.1a;

- '*the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made*' This carries over the requirements set out in the now-revoked PPS4 Policies EC16.1b and 16.1d. The requirement for a longer 10 year time horizon is introduced for 'major schemes'.

2.14 The NPPF has not revoked the Practice Guidance which accompanied PPS4. This guidance therefore remains in force and provides helpful information on the more technical aspects of assessing need and the relevant considerations which should be applied when undertaking the sequential approach and assessing the retail impact of developments.

Regional Planning Policy

2.15 In July 2010, the Government put an end to regional planning and revoked the power of Regional Spatial Strategies (RSS) under Section 79(6) of the 2009 Local Democracy, Economic Development and Construction Act, with immediate effect.

2.16 However, on 10 November 2010, a decision was made by the High Court to re-establish RSSs as part of the development plan. This decision was a result of the case brought to the High Court by CALA Homes to contest the abolition of RSSs in July 2010.

2.17 Although RSSs are considered to be part of the development plan, and as such a material consideration in the determination of planning application, advice issued by the DCLG subsequently requires the intention to revoke the documents must form a material consideration. CALA Homes have since been given leave to challenge this.

2.18 The Localism Bill received Royal Assent on 15 November 2011 and prevents any further RSS from being created. A second stage of 'revocation orders' will abolish each existing RSS outside London. However, this is subject to the outcome of environmental assessments that the Department of Communities and Local Government is undertaking; consultation on this closed on 20 January 2012.

2.19 Advice produced by the Planning Inspectorate for use by its inspectors (17 November 2011) is clear in its conclusion that 'pending the consideration of the RS [Regional Strategies] environmental assessment reports and any subsequent revocation orders, the position of the Government's policy intention to revoke the existing RS outside London remains unchanged'. As such, whilst the

Localism Act 2011 is now in place, until formal revocation, the RSS remains part of the statutory development plan.

2.20 Accordingly, it is anticipated that the South East Plan (May 2009) will not in the medium to long term form part of the statutory development plan; however, given that it currently remains in force, the relevant policies are set out briefly below.

2.21 A network of strategic town centres comprising primary and secondary regional centres is identified. Whilst none are identified within LDC, Brighton and Eastbourne are designated as primary regional centres and Haywards Heath as a secondary regional centre. None of these centres fall within the category of ‘Centres for Significant Change’ where the majority of retail growth is expected to be focused. Priority is then afforded to primary and secondary regional centres.

2.22 The District lies partially within the Sussex Coast Sub-regional Strategy Area. However, there are no specific provisions relevant to the District aside from the broad aim to enable the regeneration of the coastal towns to ‘reduce intra-regional disparities and help bring the performance of the sub-regional economy up to the South East average’ (Policy SCT1).

Local Policy

2.23 The Lewes District Local Plan (March 2003), because it was adopted prior to the Planning and Compulsory Purchase Act 2004, is under paragraph 214 considered out of date. However, the saved Local Plan policies have now been categorised as being fully consistent, consistent in part or not consistent with the NPPF to ensure the relevant policies are given their due weight in the decision-making process.

2.24 The Development Plan comprises the saved policies of the Lewes District Local Plan (March 2003). As such, the relevant policies remain as they were at the time of the GVA Retail Study (2005).

2.25 However, an area of significant change at the local level since the GVA Retail Study is the existence of the South Downs National Park (‘the National Park’) designation and governing authority, which is the sole planning authority for 56% of the Lewes District. In time the South Downs National Park Authority (SDNPA) will produce a Core Strategy including policies relating to town centres, retail and economic growth. However, in advance of this coming forward, the LDC Core Strategy is being produced jointly with the SDNPA

2.26 Lewes (within the National Park), Newhaven, Peacehaven and Seaford are identified as the main shopping centres within the District. The Primary Shopping Area (PSA) for each centre is detailed on the Proposals Map.

2.27 The retail guidance is set out in policies E3 and E4 on promoting town centre vitality and viability; policies E6 and E7 on the sequential approach; and policy E8 on rural shopping provision.

2.28 In addition, to allocating the PSAs in each town, the Local Plan identifies one retail opportunity site in Lewes. The Eastgate Area (LW7) comprising the existing Waitrose store, Eastgate Centre and bus station. The allocation stipulates that the foodstore must be retained in any redevelopment.

Emerging Policy

2.29 Consultation was undertaken between September and December 2011 on the Emerging Core Strategy, which as indicated above, is being prepared jointly with the SDNPA.

2.30 Whilst the Emerging Core Strategy does not deal with retail matters in detail, it does include a proposed settlement hierarchy. All four towns within the District are identified as 'District Centres', below higher order settlements lying outwith but exerting influence on the District including Brighton and Eastbourne as 'Primary Regional Centres' and Haywards Heath as a 'Secondary Regional Centre'. In addition, Newick and Ringmer are defined in draft as 'Rural Service Centres'. Below these, the smaller settlements are classified in terms of 'Service Villages', 'Local Villages' and 'Hamlets'. Responses were sought on the appropriateness of the proposed hierarchy.

2.31 It is understood that a number of representations were received in the above consultation period which suggested the Lewes Town should be be designated a Secondary Regional Centre due to its perceived wider function over and above its current District Centre designation. This is being considered by LDC and it is envisaged that this study will allow a decision to made on this potential change of approach.

2.32 The draft Core Strategy sets out that an up-to-date retail assessment will be undertaken to inform the forthcoming Proposed Submission draft (Summer 2012).

Retail and Town Centre Policy Conclusions

2.33 In conclusion, there is a clear shift at the national level toward a simplified overarching national policy.

2.34 This does not however necessarily mean that it should be construed as an 'opening-up' of retail planning or a move away from the town centre first approach. Rather, the less prescriptive national framework means that local authorities will have to set appropriately detailed local policies to shape and control developments in their local areas.

2.35 In terms of retailing, the focus for development should remain town centres as highly sustainable locations and a policy led approach which consistently applies retail planning ‘tests’ with local input in our view remains a very appropriate policy strategy.

3. CONSUMER AND RETAILING TRENDS

3.1 The retail sector is one of the most dynamic sectors of the UK economy and is constantly evolving and adapting in response to consumer and lifestyle trends and other market influences. These trends and influences have and will continue to alter the face of traditional high street retailing and commercial leisure development. Anticipating and being responsive to these trends and influences will be very important to understanding the way in which town centres, many of which have a long history, will be used and potentially developed/redeveloped in future years.

National Trends in Consumer Expenditure

3.2 Over the past 30 or so years there have been significant changes to the retail sector which have intrinsically changed the way the UK shops. A primary driver of this change has been the growth in both personal income and disposable consumer spending, coupled with population growth.

3.3 Strong retail spending growth has also contributed indirectly to changing the structure of retailing in the UK, particularly through car ownership and mobility generally. The number of car owning households has risen significantly and households are therefore much more mobile and the choice of where to shop is less sensitive to distances travelled relative to other factors influencing choice. In addition, the availability and convenience of parking as well as the cost to park has also influenced consumer choices and retailer and developer locational strategies.

3.4 It must however be acknowledged that the UK economy (and consequent consumer spending) is cyclical in nature and since 2007/2008, the effect of the credit crunch and the economic downturn has had a depressing effect. Whilst there are signs of an economic recovery, the extent of recovery and growth is patchy and a risk of a relapse persists. Furthermore, domestic demand is constrained by high unemployment and rising under employment; with the effect of deep Government spending cuts to balance budget deficits, a greater personal tax burden and rising inflation are all impacting upon real disposable incomes.

3.5 As a consequence of the recession, retail spending year on year for the next two to three years will be low and may in fact be negative and it is unlikely that the trend based spending growth of the past 30 years will be achieved in the medium term.

Home Shopping and Electronic Commerce

3.6 The home shopping sector includes a number of retailing channels including catalogue sales, direct retailing (which includes media adverts, mail/phone ordering and subscription services such as book and music clubs), TV shopping and internet shopping. The home shopping sector has experienced change in recent years with the growth in internet shopping replacing traditional mail order catalogue shopping which is in decline; this has caused a shift by some current catalogue retailers into e-retailing and the running of concurrent and complementary catalogue and internet site offerings. In addition, there are also pure e-commerce operators such as Amazon which (as yet) has no physical retail space.

3.7 The growth in e-retailing has been dramatic over the last few years albeit from a low base and there is no sign that the e-retail era is going to slow its pace in eating into traditional retailing's market share. An increasing number of 'high street' retailers are now operating transactional websites with recent launches by the likes of IKEA, Oasis, H&M, Superdrug, Waterstones and all of the Arcadia brands. Some retailers already selling on the internet have significantly improved their offering including Asda, Tesco, M&S, B&Q, Wickes and John Lewis Partnership. A consequence of this multi-channel retail model is retailers with a physical 'high street' presence seeking to rationalise their existing retail property portfolio and make savings on property costs such as rent, rates and wages.

3.8 Latest research by Datamonitor on e-retail suggests that 1 in 3 of the adult population is now a regular online shopper. The medium has become an accepted shopping channel and the advances in mobile technology mean that the purchases can be made *'on-the-go'* rather than reliant upon home computing. Online shopping is also considered to be strongly biased towards more affluent social classifications.

3.9 Traditional physical retail floorspace is becoming as much a 'showroom' to experience and test potential e-retail purchases, as it is a place to make purchases. The prevalence of mobile technology together with price checking websites and barcode scanning 'apps' no longer confines comparative shopping to browsing a number of town centre shops and price sensitive shoppers will if finding the same product cheaper online make an electronic rather than physical purchase.

National Trends in Retail Trading Format and Investment

3.10 The growing trend towards increased centralisation of services, whereby larger stores serving an extensive catchment are replacing a number of smaller stores as experienced in the DIY and grocery sectors, particularly is likely to continue throughout all retail sectors. This is in response to the desire to achieve increasing economies of scale and also the increasing mobility of customers. New and innovative forms of retailing will continue to require new sites and not all retailers preferred formats are likely to be accommodated in town centres.

3.11 Whilst the '*town centre first approach'* remains central to national (and local) retail planning policies and the amount of out of centre retail warehouse and food retail floorspace in the development pipeline has substantially reduced, demand for out of town space remains strong. However as planning for new out of centre development space is becoming increasingly restricted, opportunities for out of town retail warehousing has become limited and a general trend is towards smaller retail parks i.e. 50,000 sqft to 75,000 sqft in smaller towns. There has also been a trend toward more active asset management by retail park owners to release existing retail parks from bulky goods restrictions where lower value occupiers such as DIY, carpets and furniture retailers are being replaced by stronger covenant major retailers attracted from central locations to retail parks because of lower overall rents, larger, better configured stores and convenient/free customer car parking.

3.12 Running counter to the strength of out of centre retail development, in-centre shopping schemes which had seen an increasing number of proposals coming forward and being approved, have as a result of the recession been stalled as finance has largely dried up, and falling development values have rendered ambitious central schemes financially unviable. As a result, schemes which had not started on site have been postponed or reconfigured to reduce cost and risk. The recession and in particular lack of funding and debt exposure has led to a number of retail developer casualties particularly what might be considered second tier companies such as Thornfield, Modus and Castlemore.

3.13 This is not to say however that there is no town centre development coming forward, with the sustained fall in new out of town retail development, there has been a corresponding increase in development activity mainly focused upon a few large schemes in dominant regional/sub regional centres being undertaken by first tier developers such as Westfield, Grosvenor, British Land and Hammerson. Research suggests that the top 70 centres in the UK now attract over 50% of the population for comparison goods shopping and as over half of the proposed and committed new retail floorspace is focused upon these centres their market dominance will be reinforced.

3.14 Coupled with this increasing dominance of larger centres, there has been an increased dominance by multiple retailers with requirements for large shop units (typically 500-2,000 sqm). Multiples have become concentrated within the larger centres which can provide the larger space units these retailers seek. This in turn makes these locations more attractive to shoppers leading to a polarisation of the retail hierarchy. Increased mobility coupled with consumer spending growth has led to shoppers travelling greater distances to shop in larger centres with the strongest retail (multiple) offer.

3.15 This polarisation is likely to threaten the viability of major department store/comparison goods led retail development in smaller historic town centres. The alternative in many cases will be an appropriate scale foodstore anchored scheme with comparison goods shopping units to provide a development of sufficient critical mass and quality to retain expenditure, generate new customer inflow and attract key retailers.

The Retail Sector

3.16 Within the grocery sector, a combination of factors but most notably a tightened planning regime restricting the opportunity to build further large superstores, has resulted in a high level of volatility within the grocery sector with the biggest four players in the domestic market (Tesco, Asda, Sainsbury's, Morrisons) being involved in an intense competition to retain or expand market share. There has also been some consolidation within the grocery sector including the acquisition of Somerfield/Kwiksave by the Co-op and most recently Asda's purchase of Netto's UK store network.

3.17 The effect of national planning policy has been to restrict the ability of the main grocery retailers to develop sites in out of centre locations. As a consequence, in order to retain and enhance existing market shares, national multiple grocery retailers are adopting alternative development strategies. For example:

- Seeking extensions to existing premises. Existing large out of centres stores or indeed smaller supermarkets are being targeted as opportunities to upgrade these facilities to more modern formats including increased proportions of non-food goods and associated services in order to create superstore destinations.
- The expansion of the main grocery retailers into the smaller local convenience store sector. All national convenience multiples now have or are developing formats which are associated with either petrol filling stations or local shopping facilities for example Tesco Express and Sainsbury's Local which are becoming increasingly more common.
- Pursuit of mixed use redevelopment schemes in town centres and edge of centre locations to achieve a higher density of development on smaller footprint sites often requiring multi-level development with car parking either below or above the retail store and often accepting two-level trading, although this is a compromise solution on the part of the retailer.
- Grocery retailers will consider smaller sized lower order centres and are catering their retail offer and store formats to best fit these locations.

3.18 There has also been steady expansion by the deep discount food retail sector in the UK over the last decade or so and it is likely that pressure for additional stores operated by discounters will continue. Although, one of the effects of the recession however has been that the food discounters which traditionally focused their market position on value for money have come under threat from the main grocery retailers who have introduced their own value ranges to compete with the discounters. In turn, the discounters have been attempting to move up market, improving their customer offer and enhancing shopping environments thereby seeking to change the perception that a weekly shop is not possible at a discounter and seeking to dispel the public's perception that the discounters cheaper goods are in some way inferior.

3.19 Within the comparison goods shopping sector, competition remains intense and this is reflected in a number of high profile retailers recently going into administration including Courts, Littlewoods, Allders, Woolworths, Adams Childrenswear, Borders, MFI, Jane Norman and TJ Hughes. In addition, the recession has seen a number of what are regarded as the *bellwether* comparison goods retailers such as John Lewis Partnership, Next, Mothercare, and Debenhams recently reporting poorer trading and like-for-like sales as a result of the economic downturn and the squeeze on consumers' disposable incomes.

3.20 In responding to recent market conditions, the bulky goods retail sector has rationalised and due to a number of mergers, there are fewer DIY retail operators in the UK. B&Q and Homebase which had developed very large warehouse trading formats some exceeding 10,000 sqm gross have recently scaled down or closed these stores.

3.21 There has also been a shift by some of the traditional high street retailers into seeking large out of centre stores on retail parks for example Boots, TK Maxx, Next, Debenhams and Poundstretcher. In a similar vein, sports clothing retailers including JJB Sports, JD Sports and Sports Direct have also expanded their out of centre presence. Decathlon remains focused on solely out-of-centre retail park locations.

3.22 The department store market, which generally attracts more affluent customers and are often key anchor tenants within town centre shopping developments has been relatively quiet in recent years in terms of new store openings as these are generally restricted to shopping centre developments where landlords/developers are prepared to contribute to the fit out costs or to pay a premium to the department store tenant in order to secure an anchor trader that will enhance the profile and let-ability of a development.

3.23 With the effects of the recession and the lull in town centre development, the opportunities for department stores are currently limited. That said, John Lewis have a new *'at Home'* trading format which they have been rolling out on retail parks. The '*at Home'* format is concentrated on homewares, furnishings and electrical good; they do not offer clothing or fashion accessories. In a similar vein, Debenhams have introduced a scaled down '*Desire'* store format, which is clothing based.

3.24 The electrical goods sector has been subject to change and consolidation with PC World and Curry's for example seeking to combine their trading formats, the arrival and then departure of US electrical retailer Best Buy and the strength of the existing UK electrical retailers on-line sales channels has made this comparison goods sector particularly competitive. Whilst the electrical goods sector has continued to grow it's expenditure share with consumers seeking to keep pace with new technology.

3.25 There has been a noticeable growth trend in the discount clothes and homewares sector with renewed consumer interest in 'fast fashion' and value for money. Key beneficiaries of this trend have been discount retailers such as Matalan, Primark, TK Maxx, Dunelm Mill and Peacocks as well as the supermarket based clothing lines such as Tu at Sainsbury, George at Asda, Cherokee and Florence & Fred at Tesco.

3.26 Notwithstanding the growth of the discount clothing chains, the clothing sector continues to be led by Marks and Spencer which has the largest market share of the sector followed by Next and the national multiple fashion led retailers.

Leisure Trends

3.27 The demand for commercial leisure facilities has increased significantly during the last 20 years.

3.28 The 1990s saw the development of major leisure parks, these are generally anchored by a large multiplex cinemas and offer other facilities such as ten-pin bowling, bingo, nightclubs, health and fitness clubs, themed restaurants and pubs, children's nurseries and sometimes budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or on out of centre sites with good road access. Many leisure uses have also emerged on retail warehouse parks to take advantage of customer attraction and extensive (free) car parking.

3.29 The cinema market remains an important sector because cinemas often anchor town and city centre schemes and leisure developments provide footfall for other uses, encouraging longer dwell times, extending periods of viable footfall and contributing to early evening/night-time uses in centres. However growth in this sector has slowed in recent years with many areas reaching saturation. Many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such City Screen, Mainline Pictures and Real Time cinemas have opened new smaller cinemas or taken over small cinemas in recent years.

3.30 The expansion of other leisure sectors including ten pin bowling and bingo have slowed, however other sub sectors have remained strong in recent years in particular the private health and fitness market with a number of multiple operators seeking premises across the UK (LA Fitness, Fitness First and Esporta).

Conclusions on National Trends

3.31 The national trend analysis illustrates how adaptive and innovative the retail sector has been in responding to changing market conditions and how quickly new formats are introduced to capitalise on opportunities. The retail market is generally entering a period of significant change where the potential of the internet and e-retailing will be realised and given the polarisation in the retail sector with national multiples dominating, larger centres with critical mass will become more dominant at the expense of smaller town centres.

3.32 As this brief analysis has illustrated, the retail and leisure market is a dynamic and constantly evolving sector. It is important that trends and emerging formats are reviewed on a regular basis to ensure that planning and town centre strategy is alive to the market and can adapt and respond to changes.

4. RETAIL CONTEXT AND HIERARCHY

4.1 This section provides an overview of shopping patterns within the District, drawing on the results from the household survey, together with site visits to the various centres. The section firstly sets out an analysis of the results of the survey in terms of convenience and comparison shopping patterns, before going onto give a summary of the main centres within the District. Full health checks for each centre are contained at **Appendix 3**. Recognising the wider sub-regional context, analysis is also provided on the influence and role of centres outside the District for local residents.

Shopping patterns across the District

4.2 A survey of 800 households was undertaken by Allegra Strategies in December 2011 to establish convenience and comparison shopping patterns across the District. As well as including questions on shopping practices, qualitative questions were included to provide insight into local residents' opinions of the centres within the District when making decisions on where to shop. A copy of the results is contained at **Appendix 2**.

4.3 In preparing the quantitative retail need assessment we have adopted a study area which broadly reflects the District's administrative geography and the attraction of its main town centres.

4.4 The study area has been defined based upon postcode sector geography as this is the basis upon which sampling for the household telephone survey is undertaken. The overall study area has been divided into nine study zones, which have been defined to reflect the locational shopping choices of survey respondents and the core catchment of individual centres.

Table 4.1: Household Survey Zones

Zone	Component Postal Sectors
1	BN7 1, BN7 2
2	BN7 3
3	BN8 4
4	BN8 5, BN8 6 (part)
5	BN25 1, BN25 2, BN25 3, BN25 4
6	BN9 0, BN9 9
7	BN10 7, BN10 8
8	BN2 8
9	BN6 8, RH17 7Q&R only

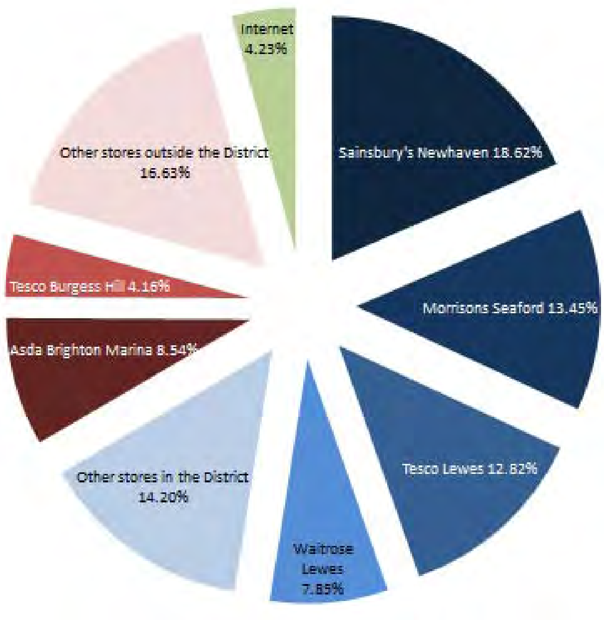
4.5 The study area and study zones are more focused upon Lewes District than those used in the earlier GVA Study, which it was felt included peripheral areas outside the District, from which little or no trade was being attracted by the District's town centres.

4.6 The study area and study zones are shown on the map at **Appendix 4**; a reduced version is provided at **Figure 4.1**. This Study Area Plan also identifies main town centres in Lewes, as identified in the Adopted Local Plan/Emerging Core Strategy.

Figure 4.1: Study Area Plan

4.7 Main food shopping in the district is not dominated by a single centre or store: Sainsbury's in Newhaven, Morrisons in Seaford; and Tesco and Waitrose in Lewes figure prominently. Overall, 67% of main food expenditure is retained within the District, whilst 29% is made beyond the District: Asda at Brighton Marina and Tesco at Burgess Hill are the most popular destinations. The remaining 4% is made on the internet.

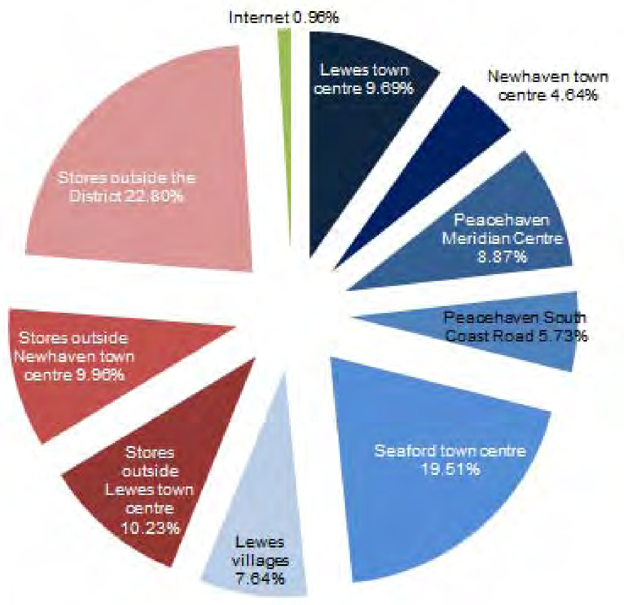
Figure 4.2: Main food shopping shares[1]



4.8 A higher proportion of top-up expenditure is retained within the District (76%); conversely, a lower proportion of top-up spend is made out with the District. Beyond the main centres, the villages in the District attract 8% of top-up shopping spending. Unsurprisingly, internet expenditure accounts for a lower proportion of top-up food spend (1%). The analysis of top up shopping excludes those respondents to the survey who stated they do not do top up shopping. The overall percentage of respondents not doing a top up shop was 17.8%.

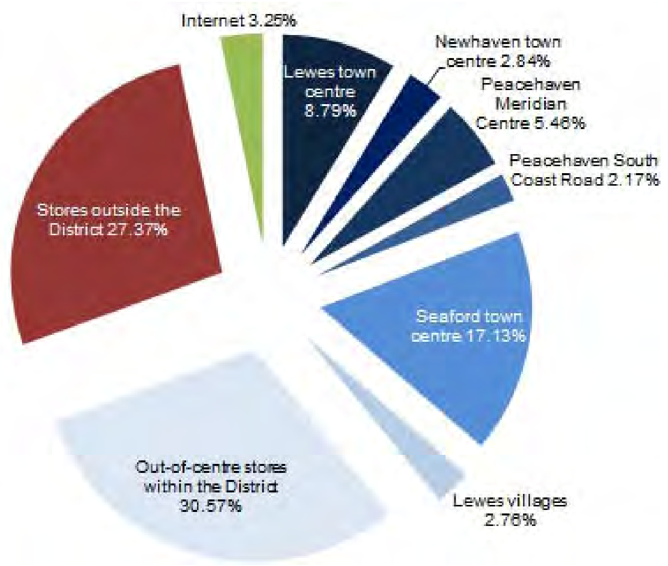
[1] Appendix 2 Questions 1 & 6 (weighted 80%/20%)

Figure 4.3: Top-up shopping shares[2]



4.9 The centres within the District account for 39% of food expenditure; out-of-centre stores, stores outside the District and the internet account for the residual 31%, 27% and 3% respectively. In part a reflection of the lack of competing out-of-centre floorspace, Seaford attracts a significant proportion of food expenditure in the District, when compared to the other town centres.

Figure 4.4: Combined food shopping patterns across the District[3]



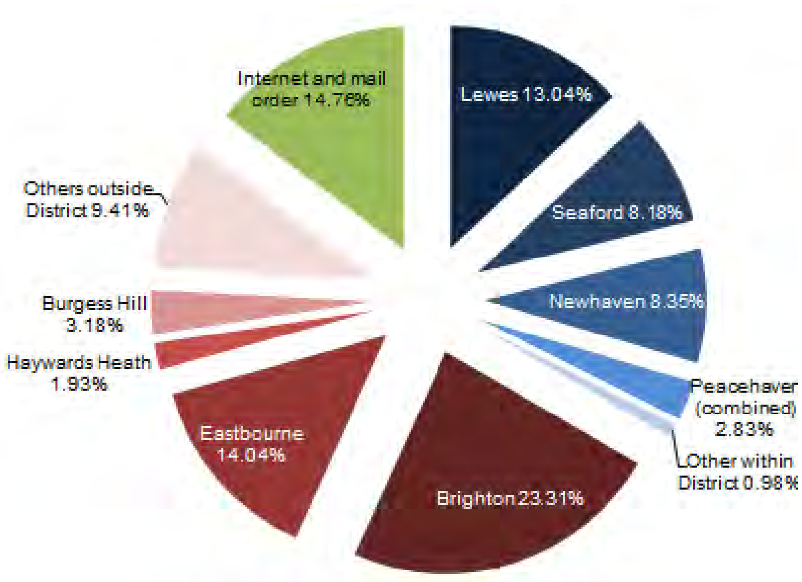
[2] Appendix 2 Question 7
[3] Appendix 2 Questions 1, 6 & 7

4.10 Lewes is the dominant convenience shopping destination across Zones 1, 2 and 4. Seaford, Newhaven and Peacehaven are the main food shopping destinations in Zones 5, 6 and 7 respectively. In Zones 3, 8 and 9, the most popular convenience shopping destination is outside the District. In Zone 3, stores in Haywards Heath and Burgess Hill account for 28% of convenience spend, with Tesco Uckfield taking an additional 21%. Asda at Brighton Marina and Tesco at Burgess Hill are the most popular food shopping destinations in Zones 8 and 9.

4.11 In terms of comparison shopping, the centres and stores within the District retain a much lower proportion of expenditure than convenience shopping. This is unsurprising, given the proximity of the higher order centres of Brighton and Eastbourne. Centres within the District account for 33% of comparison expenditure; the remaining 67% is split between locations outside the District (52%) and internet/mail order (15%).

4.12 Brighton represents the stand-out comparison shopping destination for residents in the District (23%). Although Eastbourne is the second-most popular destination (14%), it is notable that internet/mail order takes the second highest proportion of comparison spending (15%). Within the District, Lewes is the most popular destination for comparison shopping (13%).

Figure 4.5: Combined Comparison Shopping Patterns[4]



4.13 The attraction of the centres varies across the different comparison goods sectors. **Figure 4.6** below summarises the most popular destinations across each sector by zone. Lewes acts as a comparison draw primarily across Zones 1, 2 and 4 within the healthcare goods, books etc., leisure goods, homewares, furniture/furnishings and DIY goods; beyond these zones and outside these

[4] Appendix 2 Questions 10 – 19

sectors, the centre has more limited influence. With the exception of Zone 9, where Burgess Hill is the most popular destination, locations within the District dominate DIY expenditure across all of the zones. Similarly, the popular destinations for healthcare expenditure within the District, apart from in Zones 7, 8 and 9, where Brighton, Saltdean and Burgess Hill are the most popular choices. Within zone 8, which is a relatively small zone focused upon Saltdean, there are two centres at Longridge Avenue and Lustrells Vale, both have chemists within them. This accounts for the 'importance' of Saltdean for healthcare/chemist goods shopping.

Figure 4.6: Comparison shopping destinations (by sector and zone)[5]

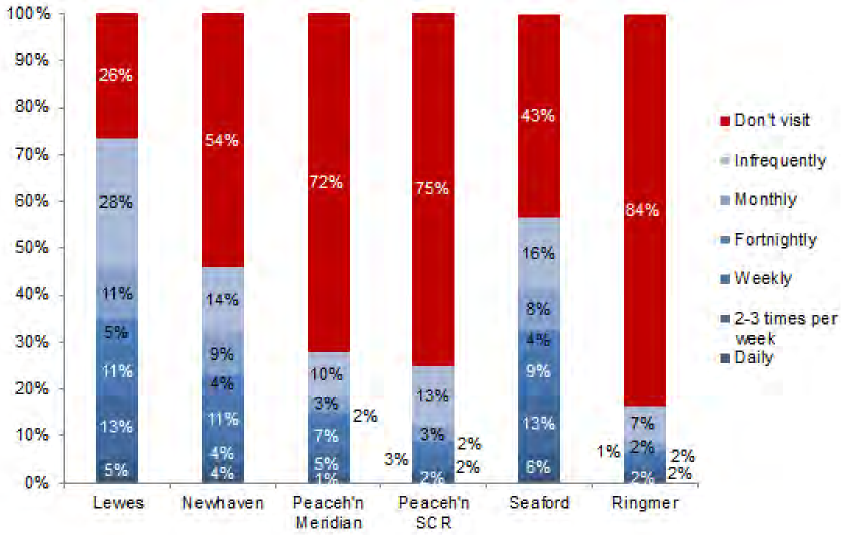
	Fashion	Health care	Books, CDs & DVDs etc	Leisure goods	Home-wares	House-hold appliances	Audio-visual goods	Furniture & furnishing	DIY
1	Brighton	**Lewes**	**Lewes**	**Lewes**	**Lewes**	Brighton	Brighton	**Lewes**	**Lewes**
2	Brighton	**Lewes**	**Lewes**	**Lewes**	**Lewes**	Internet	Internet	Brighton	**Lewes**
3	Brighton	**Newick**	Internet	Internet	Internet	Internet	Internet	Haywards Heath	Uckfield
4	Brighton	**Lewes**	**Lewes**	**Lewes**	**Lewes**	Brighton	Internet	**Lewes**	**Lewes**
5	Eastbourne	**Seaford**	**Seaford**	**Seaford**	**Seaford**	Eastbourne	Eastbourne	**Seaford**	**Newhaven**
6	Brighton	**Newhaven**	**Newhaven**	Brighton	Brighton	Internet	Internet	**Newhaven**	**Newhaven**
7	Brighton	Brighton	Brighton	Brighton	Brighton	**Peaceh'n**	Brighton	**Peaceh'n**	**Newhaven**
8	Brighton	Saltdean	Brighton	Brighton	Brighton	Internet	Brighton	Brighton	**Newhaven**
9	Brighton	Burgess Hill	Burgess Hill	Brighton	Brighton	Burgess Hill	Internet	Brighton	Burgess Hill

4.14 In terms of destinations out with the District, Brighton is the major fashion (clothing and footwear) destination for residents within the District, with the exception of Zone 5 which is located in close proximity to Eastbourne. Together with Seaford, Eastbourne exerts most influence over residents within Zone 5. Across Zones 6, 7, 8 and 9, Brighton is an important comparison shopping destination, particularly in terms of leisure goods and homewares.

4.15 The internet features strongly as the most popular option for comparison spending, particularly in Zone 3 which is more remote from the choice provided in Brighton and Eastbourne than other parts of the District. More generally, the internet can be seen to be a popular choice in a number of zones in the District for audio-visual purchases and household appliances (Zones 2, 3, 4, 6 and 9).

[5] Appendix 2 Questions 10 - 19

Figure 4.7: Frequency of visits to centres within the District[6]

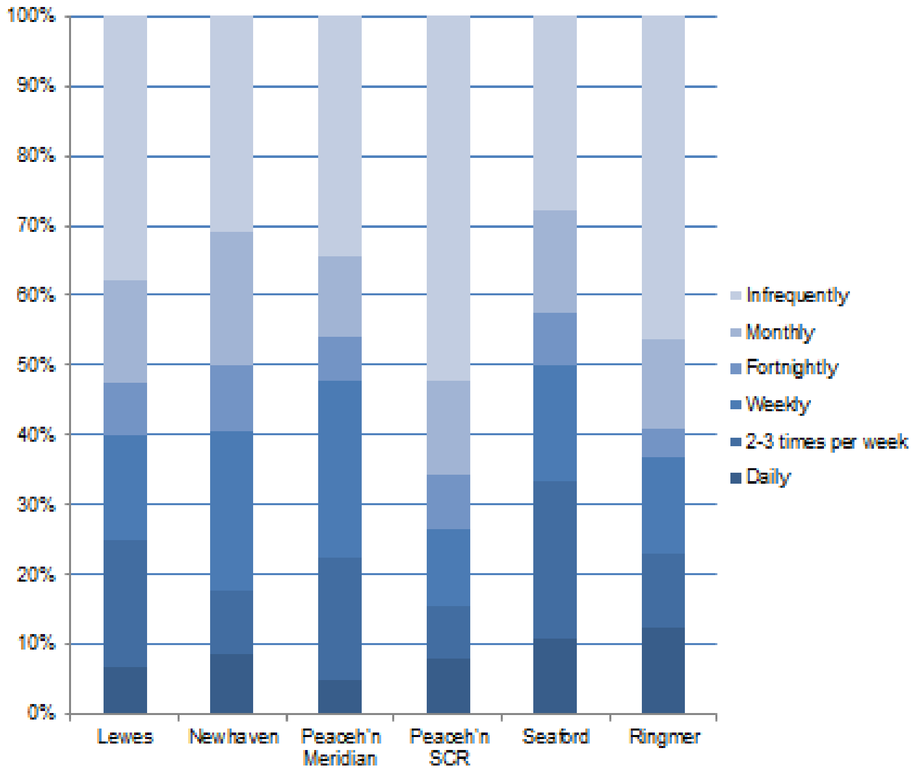


4.16 All households were asked questions on their frequency of visits to the various centres. Lewes has the widest attraction across the District; however, excluding those that either don't visit or only visit the centre infrequently, it is evident that Lewes and Seaford have a comparable level of attraction.

4.17 Ringmer, together with both centres in Peacehaven, do not exert any attraction for the majority of households in the District. In the instance of Ringmer, this is considered to stem largely from the limited retail offer in the village. However, with regard to Peacehaven, whilst limited retail offer is likely to be a factor, this is intrinsically linked to the centres' proximity to better retail offer in and on the outskirts of Newhaven and Brighton.

[6] Appendix 2 Question 21

Figure 4.8: Frequency of shopping visits (excluding don't visit)[7]



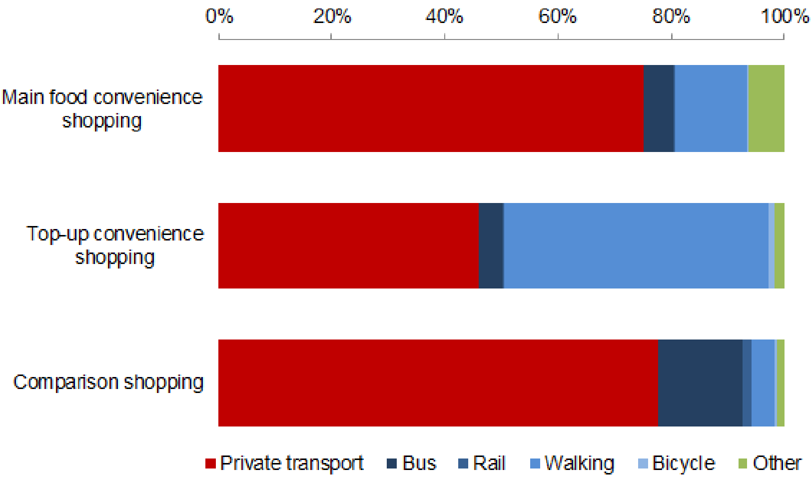
4.18 A clearer analysis of frequency in shopping habits is evident when those that do not visit the various centres are excluded, as shown below in **Figure 4.8**.

4.19 In all cases, the majority of respondents visit the various centres on a less than weekly basis. Having said this, the proportion of shoppers visiting on a more than weekly basis is near to 50% in Seaford and Peacehaven (Meridian Centre).

4.20 No single destination is characterised by particularly regular visits. This is considered to reflect the predominantly rural nature of the catchment and the fact that most people use private transport to access shops and services (**Figure 4.9**).

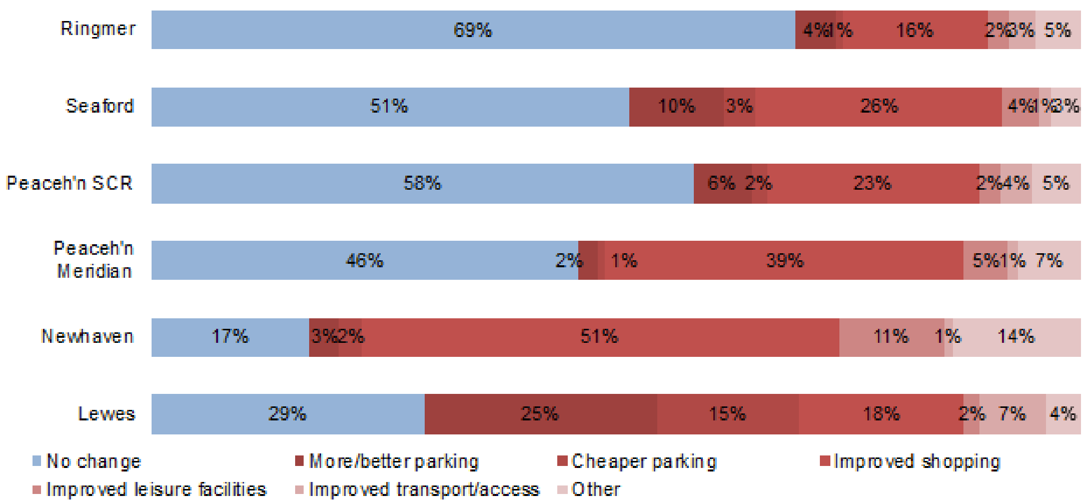
[7] Appendix 2 Question 21

Figure 4.9: Mode of transport[8]



4.21 A series of qualitative questions were asked to those residents shopping in the centres within the District in terms of what improvements could be made to encourage them to shop more frequently in the centres. The results are summarised in **Figure 4.10** for Ringmer (140 responses), Seaford (551), Peacehaven South Coast Road (228), Peacehaven Meridian Centre (277), Newhaven (620) and Lewes (753).

Figure 4.10: Improvements to encourage more frequent visits[9]



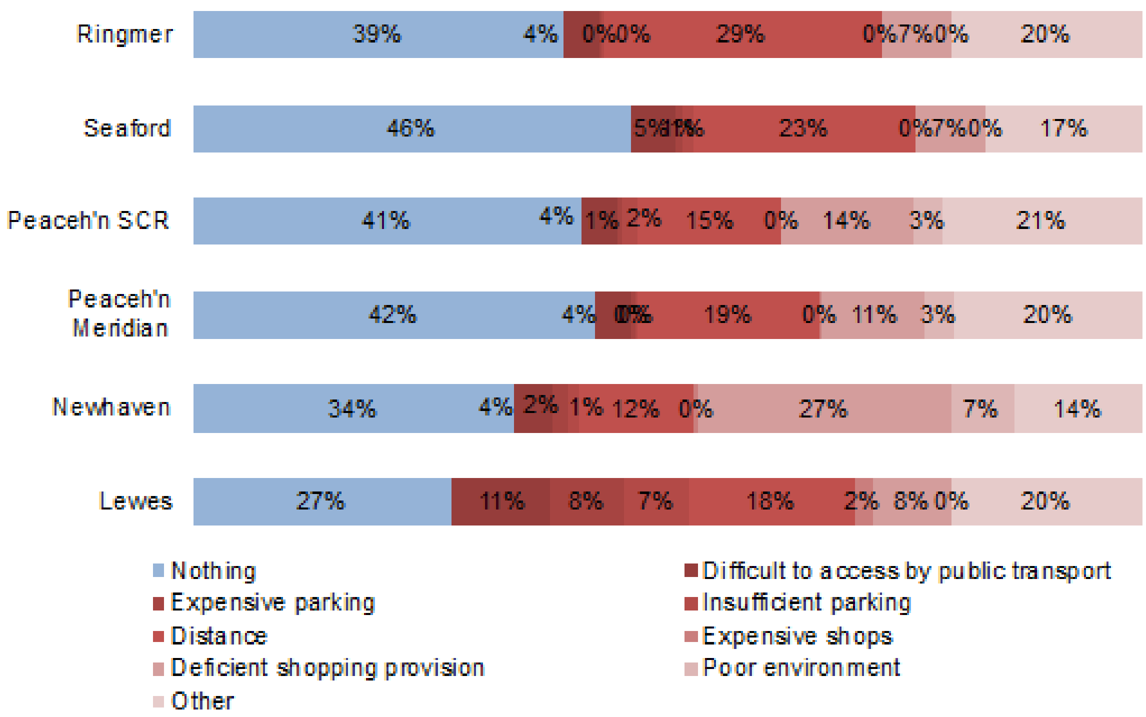
4.22 For each centre, a proportion of respondents stated that no improvements could be made to encourage more frequent visits, ranging from 69% in Ringmer to 17% in Newhaven. Whilst in the case of Lewes, parking issues can be seen to discourage more frequent shopping trips; these are

[8] Appendix 2 Questions 5, 9 & 20
[9] Appendix 2 Questions 23, 25, 27, 29, 31 & 33

regarded as less significant in Newhaven, with the need to improve shopping facilities registering a response from the majority of respondents.

4.23 In addition, questions were asked to those not currently visiting centres in the District as to what improvements could be made. Across all the centres in the District, the single-most popular response amongst residents was that no improvements would prompt more visits (27% to 46%); similarly, distance to the centres was featured prominently (12% to 29%).

Figure 4.10: Improvements to the centres to encourage visits[10]



4.24 Parking provision (quantity and cost) and expensive shops are only significant issues in Lewes. The need for improvements in shopping provision, whilst low on residents' priorities for Lewes, are considered important for Newhaven particularly and both centres in Peacehaven.

Lewes District's Main Centres Overview

4.25 Before commenting specifically on the retail and service provision of each of Lewes District's main shopping locations, it is worth considering the relative sizes of the centres and their immediate supporting populations. The table below provides this analysis.

[10] Appendix 2 Questions 34 - 39

Key Data on Main Centres in Lewes District			
	Support Population	**Town Centre Units**	**Shopping Floorspace**
Lewes	16,348	344	15,925 sqm
Seaford	24,044	223	9,545 sqm
Newhaven	12,225	109	4,620 sqm
Peacehaven Meridian	21,657 (inc. Telscombe)	22	3,755 sqm
Peacehaven South Coast Road		91	1,900 sqm

Notes: Population is derived from the Draft Core Strategy, total town centre units are derived from Experian Goad, shopping floorspace for the town centre area is the combined convenience and comparison goods sales floorspace as surveyed by GLH.

4.26 Whilst having a smaller support population than Seaford or Peacehaven, Lewes town centre is the largest in terms of town centre units and retail floorspace.

Lewes

4.27 Lewes is the largest centre by shopping units within the District. The historic fabric and setting of the town combines to form an attractive shopping environment focused on the High Street, Cliffe High Street and the Eastgate area. A large proportion of the building comprising the town centre shopping area are Listed and the town centre is covered by a Conservation Area.

4.28 In shopping terms, higher-end independent comparison operators form a significant component of the centre's retail offer. National multiples in the town include Waitrose, WH Smiths, Boots and Superdrug. Other multiple retailers include designer and high quality retailers such as Crew Clothing and East. Although there is a reasonable level of representation from national retailers in Lewes, these multiples are typically, because of the historic and constrained nature of the town, located in smaller compromised units and do not as a consequence offer their full goods ranges.

4.29 Quality individual independent retailer representation in the centre is high. This plays a significant part in defining Lewes' identity as a centre and therefore the shopping experience. Tourist spending clearly forms an important part of the income for many shopkeepers in the town, both independent and multiple. Independent retailing is particularly strong in jewellery, clothing, gifts and antiques. This tourist economy ties into attractions such as the Castle, the medieval priory, the Harveys brewery complex and the setting of the town within the South Downs National Park.

4.30 Food and drink catering provision within Lewes is strong with a good range and choice of eating and drinking establishments ranging from national coffee shop chains and independent artisan cafes to formal restaurants.

4.31 Outside Lewes's main town centre shopping area there is a Tesco superstore, (2,487 sqm net) at Brooks Road which has permission for an extension of a further 912 sqm net. A new Aldi store on land adjacent to the Tesco opened in autumn 2011.

4.32 Although the Tesco stores is identified as being within the town centre boundary (on the Adopted Local Plan Proposals Map) and both Tesco and Aldi are within a reasonable walking distance of the town centre being connected by a footpath (Jenners Way) into Cliffe High Street we consider they are out of centre facilities (based on walking distance from store entrances to the primary shopping area of Lewes) particularly as physically and psychologically they are separated by the busy Phoenix Causeway. The only other significant out-of-centre retailing in Lewes is the Homebase, Carpetright and Topps Tiles units at Mallings Brook/Brook Road in the vicinity of Tesco/Aldi.

Newhaven

4.33 Newhaven town centre is focused upon the High Street and Newhaven Square shopping precinct and the latter is anchored by a Co-op store (1,500 sqm net). The shopping core is pedestrianised; however, it is fully contained by an often congested ring road (North Way and South Way) which has the effect of cutting the town centre off from the rest of the town.

4.34 Peacocks, Poundstretcher and Boots are the only significant national comparison multiples in Newhaven. There are a number of vacancies including a number of larger, more modern premises; and notably both M & Co and Barclays have recently withdrawn from Newhaven.

4.35 Whilst Newhaven town centre is not a particularly strong retail location, it does have a range of other town centre uses including cafes and restaurant premises, take-away food outlets, pubs and A2 professional service uses.

4.36 In Newhaven there is a concentration of out-of-centre retail floorspace on the Drove to the east of the town centres. Convenience goods retailers in this location including Sainsbury's and Lidl. There is comparison retailer representation from B&Q, Carpetright, Halfords, Rosebys and the Original Factory Shop. In addition, it is understood that Argos will occupy a unit which previously traded as MFI. The retail park is located beyond the railway station, some 500m from the town centre. Aside from this, there is representation from carpets retailer Fludes on Denton Island, to the north of the ring road.

4.37 In addition to the existing out of centre provision, planning permission was recently issued for a 1,937 sqm net extension to the existing Sainsbury's store and the Council are currently considering applications for significant retail development in Newhaven comprising proposals for an Asda store (3,696 sqm net) on land at Eastside; and a Tesco store at Railway Quay (4,558 sqm net).

Peacehaven

4.38 Located approximately two miles to the west of Newhaven, Peacehaven comprises two separate centres: South Coast Road, a linear parade of shops; and the Meridian Centre, a purpose-built 1970s shopping complex. Across the two locations, there is limited representation from national multiples.

4.39 The Meridian Centre is anchored by a Co-op store (2,485 sqm net); within the store there is a Peacocks concession outlet. Other occupiers cater primarily for everyday top-up convenience and service needs. Additional local services include a library, community centre and Town Council offices. Following the closure of the McColls which included a Post Office counter, the Co-op have confirmed they will be opening a Post Office within their existing store.

4.40 Situated to the south of the Meridian Centre, the South Coast Road forms part of the A259 linking Eastbourne and Brighton. It is a linear centre, located on a busy main road and acts primarily as a pass-by trade destination. A Sainsbury's Local has recently opened on the South Coast Road, more than doubling the convenience retail offer in that part of the centre.

Seaford

4.41 Seaford, located to the east of Newhaven has a compact shopping area focused upon Broad Street, the High Street, Church Street, Clinton Place and Dane Road. The centres retail shopping floorspace extends to 9,545 sqm and is the second-largest centre within the District (by town centre unit numbers and floorspace).

4.42 A Morrisons store (previously operated as a Safeway), with a sales area of 2,205 sqm, provides an anchor to the town centre. Beyond this, representation from national multiples within the centre is relatively limited but does include Boots the Chemist, WH Smith, M&Co, Clintons Cards, Stead & Simpson, Specsaver, the Co-Op and Tesco (Express). Seaford also has a good range and choice of local independent convenience and comparison goods retailers as well as a comprehensive choice of retail services.

4.43 Unlike both Newhaven and Lewes, there is little in the way of out-of-centre retail provision competing for market share with the town centre. This is reflected in the relatively strong performance of the centre in terms of capturing market share and its overall retail diversity.

Significant competing centres

4.44 It is evident from the household survey that centres outside the District play an important role for residents. Whilst convenience shopping patterns in Zones 1, 2 and 4 are largely dominated by Lewes; residents in the more peripheral zones look to Haywards Heath (Zone 3), Eastbourne (Zone 5), Brighton (Zones 6, 7 and 8) and Burgess Hill (Zone 9).

4.45 As set out above, Brighton and Eastbourne as higher-order centres are important comparison shopping destinations for residents. In addition, the smaller centres of Burgess Hill, Haywards Heath and Uckfield, proximate the District's boundaries, account for a significant proportion of comparison expenditure.

Brighton

4.46 Retail floorspace in the Brighton city centre totals some 163,000 sqm (gross)[11], with retailer representation strong amongst the national multiples, including higher-end stores. Churchil Square Shopping Centre (anchored by Debenhams), North Street and Western Road form Brighton's primary shopping area; this part of the centre is underpinned by national multiples servicing both comparison and service needs over a wide catchment. In addition, the Lanes and North Laine act as specialist, independent comparison and service retail destinations within the centre.

4.47 There has been recent investment in the centre at Jubilee Street (North Laine) to include shops and restaurants. Furthermore, a masterplan to redevelop land adjacent to Brighton station for uses including leisure and retail was approved in 2003 and is in the process of being developed out in phases. The final permission was granted in autumn 2011.

4.48 Brighton has the strongest market share in Zones 6, 7, 8 and 9. However, it is evident that the centre draws from a wide catchment and exerts significant influence over the District, befitting to its role as a primary sub-regional centre. This appears unlikely to change; demand amongst retailers for representation is high and inevitably the dominance of Brighton as a comparison shopping destination will constrain opportunities for growth in centres within Lewes District.

[11] Brighton & Hove City Council Retail Study April 2006

Eastbourne

4.49 Eastbourne is located to the south-east of Lewes District and retail floorspace in the centre totals 99,000 sqm[12]. There is a good level of retailer representation amongst the national multiples including Marks & Spencers, Debenhams and Bhs. Outside the town centre there is a significant element of retail park shopping. It is noted that there is a current application for redevelopment and an extension to the Arndale Centre, comprising 22 additional shop units and totalling 17,000 sqm retail floorspace.

4.50 Eastbourne town centre exerts most influence in Zones 4, 5 and 6 of the Lewes Study Area. Beyond these zones, Eastbourne acts as a secondary or alternative clothing and fashion shopping destination to Brighton. However, in terms of other comparison goods, beyond Zone 4, 5 and 6, Eastbourne has more limited influence within the District.

Haywards Heath

4.51 Haywards Heath is smaller than both Brighton and Eastbourne (35,100 sqm gross retail floorspace[13]). The presence of a major railway station with good commuter rail links to London, although somewhat removed from the town centre, is considered to bolster the attraction of the centre to retailers. The most recent Mid Sussex Retail Study concludes that the centre is performing well, with a strong range of key attractors enabling a strong draw amongst higher income brackets.

4.52 The core shopping area is focused on South Road and includes WH Smiths, Boots, Waterstones and Robert Dyas. With an entrance onto South Road, the partially-covered Orchard Shopping Centre (9,290 sqm) includes national multiples including Marks & Spencer, Dorothy Perkins, Superdrug and Accessorize. Convenience retail provision within the centre itself has been bolstered by the Co-Op taking occupation of the former Woolworths unit. Outside the town centre, there is a large out-of-centre Sainsbury's superstore.

4.53 Although the Haywards Heath attracts a degree of comparison expenditure from residents in Zone 3; even within this zone, it is only dominant within the furniture and furnishings sector. Similarly, whilst there is a degree of convenience influence over Zone 3 particularly by the the Sainsbury's store, it is not the stand-out or dominant destination.

[12] Eastbourne Borough Council Eastbourne Shopping Assessment May 2010
[13] Mid Sussex District Council Retail Study September 2008

Burgess Hill

4.54 Burgess Hill is located to the north-west of the District, five miles to the south of Haywards Heath. It comprises 37,700 sqm (gross) retail floorspace[14]. The most recent Mid-Sussex District Council-commissioned study confirms that the centre, whilst at present healthy, is underperforming in terms of fulfilling a comparison shopping role for higher earners and that it will be increasingly unable to compete with destinations such as Brighton without further investment.

4.55 The Martlets Shopping Centre, the Market Place, Church Walk and Church Street comprise the main shopping core of Burgess Hill. National multiple comparison retailers in the town centre include Argos, Peacocks, Wilkinsons, Boots and Currys.

4.56 There is strong convenience retailer representation in the centre in the form of a Waitrose, Lidl, Co-op and Iceland. However, the out-of-centre Tesco superstore at Hammonds Farm is the major convenience attractor. It is the dominant convenience shopping destination within Zone 9.

Hailsham

4.57 Hailsham lies to the east of the District, to the north of Eastbourne. It includes 19,300 sqm (gross) retail floorspace[15], focused on The Quintins and Vicarage Fields.

4.58 The Co-op withdrew from the town in summer 2011, having converted the former Somerfield store; the unit remains vacant. As a consequence, the town centre is now anchored predominately by the Waitrose store, which draws a small proportion of trade from Zone 4. However, there has been recent investment in the town: a new edge-of-centre Tesco store recently opened, permission was granted in October 2011 for a new foodstore adjacent to the vacant former Co-op site and Iceland have occupied the former Woolworths unit.

4.59 Comparison retail provision in the town is dominated independent retailers, with a more limited presence from national multiples including Boots and Superdrug. Hailsham attracts some comparison expenditure from Zone 4; however, it is only in the DIY sector that this share of the market approaches 10%. The attraction of the centre is therefore limited, even in the nearest zone. In this way, the centre clearly performs a subordinate role to nearby Eastbourne.

[14] Mid Sussex District Council Retail Study September 2008
[15] WDC Retail Study Interim Report (October 2008)

Uckfield

4.60 Uckfield is located to the north-east of Lewes District, within Wealden District. The centre includes 30,000 sqm (gross) retail floorspace[16]. In-centre Tesco and Waitrose (formerly Co-op) stores anchor the town. Uckfield attracts a significant proportion of convenience expenditure from Zone 3 (over 20%).

4.61 In comparison terms, the role of the Uckfield town centre is more limited. As with Hailsham, the number of national multiples is low, with independents dominating the non-food shopping offer in the town. That said, Uckfield has some influence over the eastern zones in the District, particularly for lower-order comparison goods: the town is the primary destination for DIY goods and the secondary destination for leisure and recreation goods in Zone 3. However, it is notable that, despite the close proximity, the internet as a shopping channel can be seen to out-perform Uckfield for the majority of the comparison goods sectors within Zone 3.

Tunbridge Wells

4.62 Tunbridge Wells town centre comprises 104,646 sqm (gross) retail floorspace over 524 units, chiefly made up of comparison shopping space[17]. The centre is effectively dual focused with the main part of the centre anchored by the Royal Victoria Place shopping centre (recently acquired by Westfield) and characterised by national multiples. The historic Pantiles and Corn Exchange area acts as the other focus of activity in the centre and, like Lewes, Tunbridge Wells has a high level of representation from quality independent retailers and retail services.

4.63 Convenience goods shopping in Tunbridge Wells is focused upon the edge of centre Sainsbury superstore at Linden Park Road. Competition for this store will soon be provided by a new Morrisons store at Vale Road, next to Tunbridge Wells railway station.

4.64 The recent Tunbridge Wells Borough Council retail study reflects that, although fairly vital and vibrant with low levels of vacancy, there are weaknesses in the centre. Chief amongst these are the lack of choice of major retail attractions in Tunbridge Wells, in conjunction with the expansion of out-of-centre retail parks to include destination tenants such as John Lewis and Marks & Spencer.

4.65 Given these concerns, the superior comparison offer in Brighton and the centre's distance from the majority of the District's residents, it is unsurprising that Tunbridge Wells exerts a relatively low level of attraction across Lewes.

[16] WDC Retail Study Interim Report (October 2008)
[17] Tunbridge Wells Retail Study 2011

Crawley

4.66 Crawley, as with Brighton, is identified as primary sub-regional centre. Retail floorspace in the centre exceeds 85,000 sqm (gross)[18]. County Mall represents the main comparison location within the town, and includes a similar calibre of national multiple occupiers to Brighton, such as Debenhams and Marks & Spencer, and a range of fashion retailers.

4.67 Whilst its influence over the District is mostly limited, it does register as a comparison shopping destination amongst the northern zones; however, Brighton remains the preferred fashion shopping centre. It is considered too remote to play any significant convenience role and this is confirmed in the household survey results.

Conclusions

4.68 Convenience expenditure is largely retained within the District. However, residents of the peripheral zones look to centres outside the District to meet a substantive proportion of their food shopping needs.

4.69 It is evident that comparison retail provision within the District is relatively limited. Lewes represents the only centre with any real comparison choice; this is mostly focused upon higher-end retailers and independent non-food retailers. This shopping provision therefore has a significant role in supporting the tourist economy of the town. Conversely, mainstream national multiples are somewhat under-represented in the town.

4.70 Seaford town centre is important and well used for both convenience and comparison goods shopping by its local support population. Peacehaven's two shopping locations are in part complementary but the overall function is focused upon convenience goods shopping. In Newhaven, the town centre has a limited retail function and retail attraction and functionality for Newhaven has effectively transferred to the out of centre retailing facilities located to the east of the Town centre at The Drove.

4.71 Because the study area we have used is more Lewes District focused compared to the more extensive area used for the 2005 Study, it is not possible to directly compare the household shopping patterns now with those from the 2005 work. What does however stand out in the general shopping patterns are that a number of competing centres outside the District continue to exert a strong influence on shopping choices for residents and Brighton remains the most dominant centre followed by Eastbourne.

[18] Crawley Retail Capacity Study 2005

4.72 The other clear pattern is the increased use of the internet particularly for comparison goods shopping.

5. QUANTITATIVE RETAIL CAPACITY

Introduction

5.1 In this section we assess the potential quantitative need for additional floor space in Lewes District up to 2030.

5.2 The tables setting out the calculations of the retail capacity potential are provided at **Appendix 5**. The methodology, data input and results of the analysis are explained and summarised below. This quantitative analysis of retail capacity should be supplemented by the analysis of qualitative factors and these are considered in the next section, Section 6.

5.3 The quantitative retail need work has considered the following matters in a step by step approach for both convenience and comparison goods shopping:

- Existing and projected population within the study area.
- Consumer retail expenditure per head and total retail expenditure within the defined study area.
- Analysis of shopping market shares being claimed by centres and facilities within Lewes District based upon household survey shopping patterns in 2011.
- An estimate of available consumer expenditure and the growth in expenditure up to 2030 (and for the intervening years 2016, 2021 and 2026).
- Quantification of the convenience and comparison goods expenditure which is captured by centres and facilities within Lewes District and other competing centres and retail facilities outside the District.
- A comparison between the expenditure claimed by centres and facilities within the Dsitrict and their estimated benchmark turnovers of these facilities assuming they trade at acceptable levels.
- Retail capacity (quantitative need) results are expressed as theoretical expenditure surpluses (and shortfalls), providing indicative estimates for the amount of additional convenience and comparison goods shopping turnover which can be supported during the study period to 2030.
- Established expenditure/turnover surplus can be converted into floorspace potential by the application of an appropriate floorspace trading density.

5.4 The Study Brief also requires a review of the need for additional floorspace to satisfy the requirements of the service trade sectors over the Study period. Service trades are not usually considered in terms of their turnover, market share and trading density so conventional capacity analysis for this sector has not been undertaken. Service trades tend to be demand led and operators are generally attracted in proportionate terms to a town's retail provision and their key locational considerations tend to relate to levels of footfall and shopper attraction.

5.5 To provide the Council with an understanding of the level of future floorspace provision that could be required by the retail service sector, we have analysed the existing proportions of service traders within Lewes, Seaford, Newhaven and Peacehaven town centres, relative to existing convenience and comparison shopping provision. These calculated proportions are then applied to the identified convenience and comparison goods floorspace requirements in each of the town centres to establish a broad estimate for future service trade floorspace. It should though be acknowledged that generally retail service provision tends to back-fill vacated retail units, particularly where new developments lead to relocation of retailers to new space. Generally, unless part of a mixed use or more comprehensive development new floorspace is not specifically built for retail service trades. The service trade sector analysis is provided in **Appendix 6** and details of the gross floorspace need to complement the identified needs for convenience and comparison floorspace is set out in Section 7 of this report.

5.6 The retail capacity forecasts are provided on the basis of gathered information and available evidence.

5.7 The data adopted and assumptions made do, we consider, provide a robust basis for the preparation of short and medium term forecasting of retail floor space requirements. Whilst the development plan documents which the District Council are currently preparing have an end date of 2030 and our capacity forecasts run to this year, we consider that the quantitative retail capacity estimates for 2021, 2026 and 2030, should be regarded as providing only a very broad indication of potential growth and turnover capacity over that time horizon.

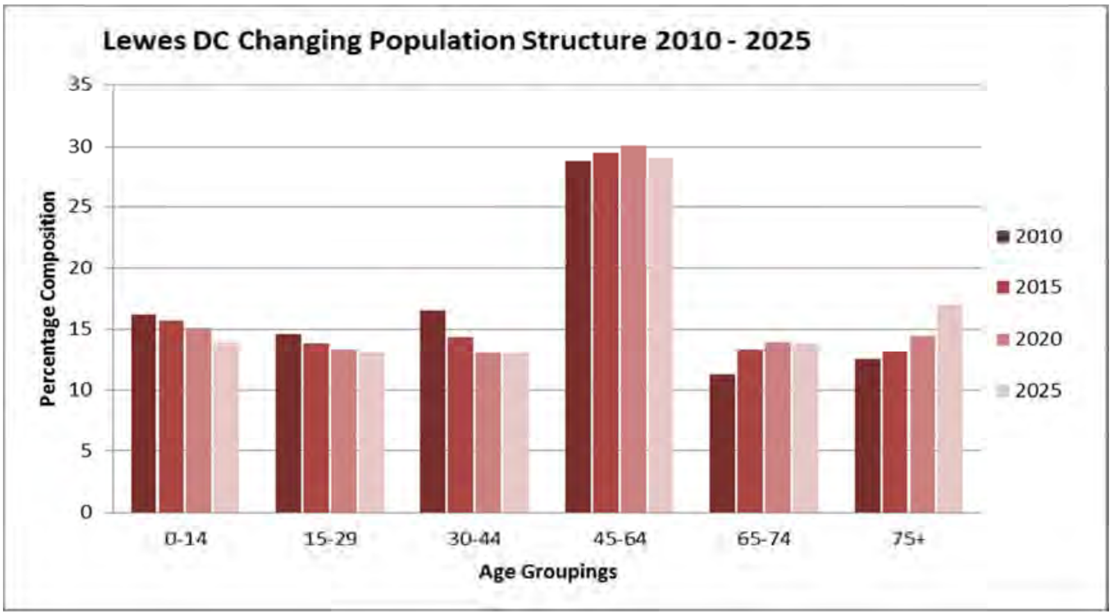
5.8 In accordance with best practice and to ensure that the Council have an up to date and robust estimate and forecasts, upon which to make policy and development decisions, it is important that the calculations should be monitored and updated periodically over the Local Development Framework period. This is to take account of updated data inputs when they become available and to include any implemented commitments and new permission which will alter current shopping patterns. Indeed, it is noteworthy that NPPF requires analysis for up to 10 years on strategic level proposals and the Practice Guidance which supported the now revoked PPS4 places most weight upon retail need forecasting over a five year timeframe.

Data Input - Population

5.9 The population within the study zones and study area for 2001, 2011 through to 2030 are set out in Table A, **Appendix 5**. This base population and the population estimates for 2011, 2012, 2016, 2021, 2026 and 2030 have been obtained from East Sussex in Figures (ESiF) and are housing based forecasts of population change prepared by East Sussex County.

5.10 Over the study period, the population within the Study Area shows very little overall change. A more detailed examination of the age structure of the population shows decline in the younger age groupings and an increase in the proportion of older 65 plus age group. The chart below using data from ESiF illustrates the shifting population profile.

Figure 5.1: Population Structure 2010-25



Data Input - Consumer Spending Estimates

5.11 The consumer expenditure per head within the study zones on both convenience and comparison goods is provided in Tables B and K respectively at **Appendix 5**. The consumer expenditure per head data is for 2010 in a 2010 price base. The consumer spending data is a local estimate based upon the local socio-economic categorisation (MOSAIC) of the area and the spending characteristics of the socio-economic groupings. These local area spending estimates have been obtained from Experian. The levels of consumer spending per head across all of the study zones are above the national (UK) average (£1,953 per head on convenience goods and £2,927 per head on comparison goods) and the spending levels per head are markedly higher in Zones 2, 3 and 9 which are the northern and western parts of the Study Area.

Data Input - Consumer Expenditure Growth

5.12 The growth in expenditure over the assessment period up to 2030 has been based upon projections provided by Experian Business Strategies within their Experian Retail Planner Briefing Note 9, September 2011. Our approach has been to take the long term growth projections for annual growth. The long term growth projection for convenience goods expenditure is +0.5% per annum and for comparison goods, the rate per annum is +2.8%.

5.13 It should be noted however that in the very short term economic forecasts for expenditure growth are considerably lower than the longer term rates we adopt. However this approach is supported by the advice provided by Experian in their Retail Planner Briefing Note 9 which states that:

'in making planning decisions for the next two decades, it is appropriate to focus upon long term trends, ignoring the largely short term effects of recent (economic) developments'.

5.14 Furthermore, as highlighted earlier, the expenditure per head values for Lewes District are ahead of national average, suggesting that the area has a generally robust spending profile and should be capable of achieving this national long term rate.

5.15 The product of study area population and expenditure per head provides an estimate of total consumer expenditure available within the study area. The available expenditure for 2012, 2016, 2021, 2026 and 2030 is calculated within Table C (convenience goods) and Table L (comparison goods) at **Appendix 5**. The combination of static population and relatively low expenditure growth rates result in only modest growth in spending potential within the Study Area over the period to 2030.

5.16 Conscious however that in the short term and cumulatively over the period to 2030 comparison goods spending could lag behind the national rate suggested by Experian (although we do not anticipate this will be the case) we have as a sensitivity analysis considered the spending potential of the study area if the lower UK year on year expenditure growth forecasts per head in Figure 1a of Experian Retail Planner Briefing Note 9 are adopted. The spot rates for the years 2011, 2012, 2013 are +0.5%, +1.6% and +2.1% respectively. Thereafter, in the period 2014 onwards growth per annum on comparison goods spend is projected to be +3.0%.

5.17 The table below shows the effect this alternative comparison goods spending growth has on overall comparison goods spending potential in the study area and compares it to the spending potential we have adopted in our analysis (Table L, **Appendix 5**). In the period 2011 to 2026 the expenditure growth rates we have adopted in the Study show more spending potential than the tighter more restricted growth rate approach, by the end of the study period in 2030 our approach shows lower overall spend potential compared to the sensitivity tested growth figure. In percentage terms the difference between the two approaches results in a percentage difference of between 2% and 4% over the study period.

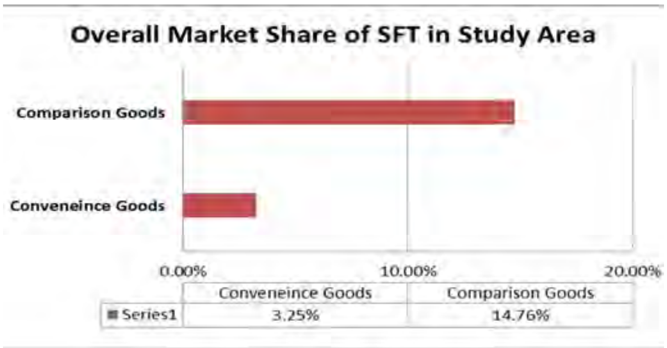
TABLE 5.1: Comparison Goods Expenditure Generated in Study Area - Sensitivity Test			
Year	**Study Adopted**	**Sensitivity Tested**	**Difference**
	£m	£m	£m
2011	£358.90	£350.87	£8.03
2016	£412.40	£398.06	£14.33
2021	£472.85	£460.87	£11.98
2026	£543.73	£535.13	£8.60
2030	£608.01	£621.16	-£13.15
Notes: Growth rates based on Experian Retail Planner Briefing Note 9.			

Data Input - Adjustments for Special Forms of Trading (SFT)

5.18 Internet shopping and spending in non-retail stores such as at markets, vending machines, mail order and party plan is commonly excluded from consumer spending per head estimates when undertaking retail planning studies. Estimates of the value and volume of SFT vary greatly; the data that is available on SFT proportions is on a national basis and, therefore, does not have regard to local use of internet shopping and other non-store channels. In addition, commentators have widely differing views on the potential growth of internet sales. Given the lack of consensus on the existing share of non-store trade achieved by SFT and the fact that the data that is available provides only a national picture; rather than make deductions for SFT at a national rate, we have used the results of the household survey to consider and exclude spending in the Study Area on SFT.

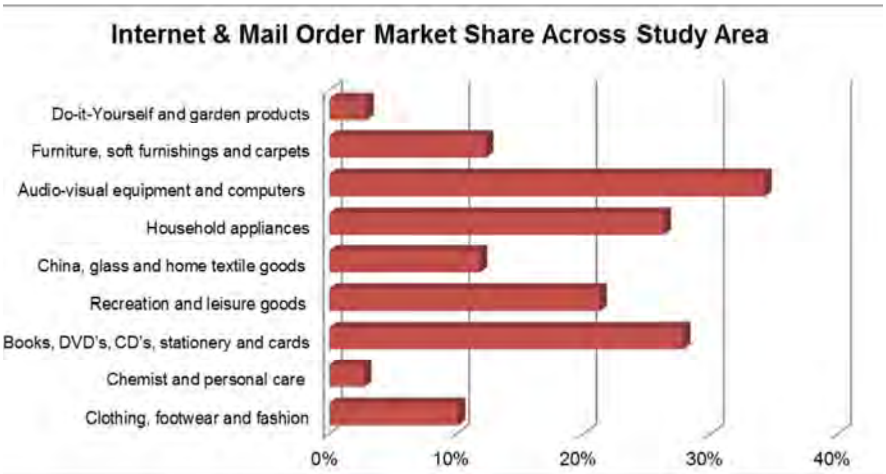
5.19 The household survey recorded residents' use of the internet, mail order and markets for both convenience and comparison goods shopping. This provides a good up to date estimate of locally based SFT and has the advantage of being directly reflective of the Study Areas' shopping habits rather than a national figure which would otherwise have been applied. The SFT rates demonstrated by the household survey results are shown below.

Figure 5.2



5.20 Within the comparison goods shopping categories, there is a range of market shares achieved by non-store retail formats. The shares being achieved by the internet and mail order across the Study Area are notable, particularly for the books/CDs/DVDs, electrical/electronic categories. The chart below details the market shares by comparison goods categories.

Figure 5.3



5.21 The 2011 survey rates for internet and mail order shopping within the Study Area are relatively high particularly when compared with national level statistics. This suggests a level of maturity in terms of market share: we have not therefore made any allowance for the SFT market share to grow over the period to 2030. Our view on this is broadly supported by analysis and comment provided by Experian, Mintel and Verdict all of whom suggests that the use of the internet/on-line sales in particular is approaching maturity and there are indications that there will be limited new consumers adopting this shopping channel. There could however be the propensity for existing on-line shoppers to increase their shopping/spending via this channel.

Data Input - Market Share Data

5.22 The retail capacity work is underwritten by the results of the household telephone interview survey conducted during early December 2011 by Allegra Strategies Limited. The survey established inter alia, the locations which residents within the study area visited to undertake shopping for various broad categories of goods, comprising food shopping (convenience goods) and component elements of non-food (comparison goods) shopping.

5.23 The full results of the household survey are reproduced as **Appendix 2** and a brief summary of the shopping patterns are provided in Section 5.

5.24 Table D (**Appendix 5**) sets out the main food shopping patterns informed by the household survey, indicating a percentage market share for each individual store/centre/location drawn from the study area. Table E (**Appendix 5**) provides percentage market share patterns for top-up food shopping. The combined main food and top up food market shares are combined in Table F.

5.25 Tables M.1 to M.9 (**Appendix 5)** provide the non-food comparison goods shopping market shares of centres and locations informed by the shopping patterns revealed in the household survey.

5.26 The market share percentages achieved by shopping facilities are applied to the available spending (or turnover potential) to derive implied market share based turnovers for Lewes' town centres and other retail facilities – see Tables G (implied convenience goods turnover) and P (implied comparison goods turnover)

5.27 For the retail capacity calculations the survey responses 'varies', 'don't know' and 'don't buy' have been removed from the survey results and the results re-based. This adjustment has been made as such responses do not enable all consumer expenditure to be allocated to retail centres or locations.

Data Input - Existing Retail Floorspace and Benchmark Trading

5.28 The existing retail sales floorspace for the District's main centres, retail warehouses and major foodstores has been estimated based upon data from the Council, published sources including IGD and through GL Hearn floorspace surveys.

5.29 The trading densities for the existing sales floorspace has where possible been based upon retailer company average data from published sources (Mintel's Retail Rankings and Verdict). These published sources provide trading densities on a 'business basis' for retailers. As retail planning analysis is concerned with the class of goods and should adopt a goods based approach some adjustments are necessary to the published figures to take account of convenience and comparison goods sales mix within food and grocery retailers. Allowances and reconciliations are also made to take account of VAT and price base.

5.30 The estimated existing floorspace and benchmark turnovers for centres and other facilities are set out in Table H (convenience) and Table Q (comparison) at **Appendix 5.**

Quantitative Retail Capacity

5.31 Retail capacity or the need for additional floorspace arises where the turnover potential available in an area exceeds the benchmark turnover of existing retail facilities in that area. This is a theoretical exercise and the ability of existing floorspace to absorb additional spending (particularly non-food comparison shopping) before overtrading conditions arise means that whilst there maybe turnover capacity for additional floorspace this will not in all circumstances result in a need for more floorspace as it is possible for existing floorspace to trade more intensively (and profitably).

Convenience Goods Shopping Need Analysis

5.32 The key convenience goods shopping capacity analysis is provided in Tables G, H and I at **Appendix 5**.

5.33 Table G sets out the implied market share turnovers, Table H the expected benchmark turnovers and Table I compares the the implied market share turnovers of convenience facilities for each of the study years with the corresponding benchmark turnover. The difference between the implied and benchmark is theoretical capacity. A positive value is capacity/overtrading and a negative value is under-trading which suggests there is no need for additional floorspace.

5.34 Table I illustrates that within the main food stores in the District, in 2012, most stores are achieving broadly their expected benchmark turnovers with the exception of the Morrisons store in Seaford which overtrades at a modest level and Sainsbury at Newhaven which overtrades to a more significant degree.

5.35 On a centre by centre basis, the capacity analysis shows facilities to be both under and overtrading, when these are all added together it shows the following convenience goods turnover capacity across the study years.

TABLE 5.2: CONVENIENCE GOODS TURNOVER CAPACITY 2012 to 2030					
Centre/Location	2012	2016	2021	2026	2030
	£m	£m	£m	£m	£m
LEWES TOWN CENTRE	£0.796	£1.246	£1.773	£2.379	£2.877
LEWES OUTSIDE TOWN CENTRE	-£3.097	-£2.436	-£1.661	-£0.769	-£0.038
SEAFORD	£6.405	£7.190	£8.110	£9.168	£10.036
NEWHAVEN TOWN CENTRE	-£4.412	-£4.277	-£4.119	-£3.937	-£3.788
NEWHAVEN OUTSIDE TOWN CENTRE	£9.873	£10.696	£11.659	£12.767	£13.676
PEACEHAVEN MERIDIAN	£0.282	£0.544	£0.850	£1.203	£1.493
PEACEHAVEN SOUTH COAST/TELESCOMBE	-£0.668	-£0.565	-£0.445	-£0.307	-£0.194
Notes: Capacity estimates from Table I, Appendix 5					

5.36 By applying a trading density appropriate for a major grocery retailer to the convenience turnover capacity estimates the following convenience goods retail floorspace need is calculated.

TABLE 5.3: CONVENIENCE GOODS TURNOVER CAPACITY AS SALES FLOORSPACE (INDICATIVE)					
Centre/Location	2012	2016	2021	2026	2030
	sqm	sqm	sqm	sqm	sqm
LEWES TOWN CENTRE	66	104	148	198	240
LEWES OUTSIDE TOWN CENTRE	Nil	Nil	Nil	Nil	Nil
SEAFORD	534	599	676	764	836
NEWHAVEN TOWN CENTRE	Nil	Nil	Nil	Nil	Nil
NEWHAVEN OUTSIDE TOWN CENTRE	823	891	972	1064	1140
PEACEHAVEN MERIDIAN	23	45	71	100	124
PEACEHAVEN SOUTH COAST/TELESCOMBE	Nil	Nil	Nil	Nil	Nil
Notes: Sales density of £12,000/sqm applied to turnover capacity estimates					

5.37 In Lewes there is small capacity surplus which is equivalent to a relatively modest floorspace need over the study period to 2030. Outside Lewes town centre, there is no identified need for additional convenience goods floorspace, although this situation is primarily a result of under trading in the recently opened Aldi store. It is anticipated this store will take some time to become established but will in time improve its market share to reach company average trading levels. The permitted extension to the Tesco store will, as it is controlled by planning condition add only a limited amount of new convenience floorspace.

5.38 Theoretical capacity and floorspace need is reasonable at Seaford town centre, where the Morrisons store trades quite strongly. The level of quantitative floorspace need is not in our view sufficient to justify a new superstore but could support an extension to the existing Morrisons or a further supermarket.

5.39 Newhaven town centre does not perform well and there is no identified quantitative need for additional convenience floorspace. This underperformance is in stark contrast to the stronger trading exhibited by the out of town retailing which gives rise to a need for around 900 sqm of additional floorspace in 2016 this increases by a small margin over the plan period. The committed extension to Sainsbury will absorb some of this convenience goods turnover capacity but it is understood that the extension is predominately for additional non-food floorspace. Our estimate of the convenience turnover of that extension is set out in Table J, **Appendix 5**. .

5.40 We are aware that the Council are currently considering two proposals for large food superstores at Newhaven, east of the town centre and on the eastern side of the River Ouse. The proposals are for food superstores of 4,558 sqm and 3,696 sqm net sales area[19]. The quantum of convenience floorspace need we have identified for Newhaven is not however of sufficient magnitude to support the level of proposed floorspace.

5.41 In Peacehaven there is some quantitative convenience goods need at the Meridian Centre but no requirement for any new floorspace at South Coast Road/Telscombe Cliffs.

Comparison Goods Shopping Need Analysis

5.42 The key analysis tables for the comparison goods capacity analysis are P, Q and R at **Appendix 5**.

5.43 Table P sets out the implied market share turnovers of the existing comparison goods shopping floorspace and the benchmark turnovers of existing facilities are estimated in Table Q. For Lewes we have made an adjustment to the benchmark trading level to reduce the comparison goods turnover of the town centre by 15%. This reduction has been made to reflect the tourist and visitor spending that the town attracts.

5.44 Table R compares implied market share turnovers with the benchmark turnovers for the study years. A summary of the retail turnover capacity results are set out in the table below:

[19] The convenience goods floorspace of these proposals will be smaller as they will include an element of non-food comparison goods sales floorspace.

TABLE 5.4: COMPARISON GOODS TURNOVER CAPACITY 2012 to 2030					
Centre/Location	2012	2016	2021	2026	2030
	£m	£m	£m	£m	£m
Lewes	-£0.760	£1.787	£5.499	£10.219	£13.793
Lewes Outside Town Centre	-£1.348	-£1.239	-£1.071	-£0.837	-£0.697
Seaford	£6.795	£8.778	£11.615	£15.107	£17.956
Newhaven	£8.287	£9.857	£12.082	£14.774	£17.055
Newhaven Outside Town Centre	-£0.341	£0.223	£1.046	£2.096	£2.885
Peacehaven (Meridian Centre)	£2.262	£2.744	£3.429	£4.263	£4.961
Peacehaven (South Coast Road)	-£0.041	£0.200	£0.551	£0.997	£1.335
Notes: Capacity estimates from Table R, Appendix 5					

5.45 This shows that there is no immediate theoretical capacity for additional comparison goods floorspace in Lewes town centre (or out of centre). In 2016 and 2021 modest capacity arises and continues to grow to 2031, although the level of comparison goods shopping turnover capacity is not that significant.

5.46 In Seaford, comparison goods shopping is estimated to be performing well and there is a turnover surplus in the base year (2012) which grows over the study period to substantial levels.

5.47 The capacity calculation results for Newhaven are in our view anomalous, the town centre has very limited and poor quality comparison goods shopping but the market share turnover established by the household survey suggest it achieves good levels of turnover and this is not apparent from visiting the centre. We anticipate that in identifying shopping in Newhaven, questionnaire respondents were referring to the out-of centre facilities as much, if not more than the town centre.

5.48 In Peacehaven, the Meridian Centre shows a modest turnover capacity and there is also a small positive level of turnover capacity for South Coast Road/Telscombe Cliffs.

5.49 The theoretical turnover capacity estimates are converted to sales floorspace equivalents in the table below.

TABLE 5.5: COMPARISON GOODS TURNOVER CAPACITY AS SALES FLOORSPACE (INDICATIVE)					
Centre/Location	2012	2016	2021	2026	2030
	sqm	sqm	sqm	sqm	sqm
Lewes	Nil	447	1,375	2,555	3,448
Lewes Outside Town Centre	Nil	Nil	Nil	Nil	Nil
Seaford	1,699	2,195	2,904	3,777	4,489
Newhaven	2,072	2,464	3,021	3,693	4,264
Newhaven Outside Town Centre	Nil	56	262	524	721
Peacehaven (Meridian Centre)	565	686	857	1,066	1,240
Peacehaven (South Coast Road)	Nil	50	138	249	334
Notes: Sales density of £4,000/sqm applied to turnover capacity estimates					

5.50 In terms of committed floorspace, there are the comparison goods floorspace elements of the Tesco Lewes and Sainsbury Newhaven store extensions to be factored in. Both extensions are predominately for non-food comparison shopping, their floorspaces are:

- Tesco, Lewes Extension - net additional comparison goods floorspace 930sqm sales
- Sainsbury, Newhaven Extension - net additional comparison goods floorspace 1,740sqm sales

5.51 The estimated turnovers of these extensions are set out in Table S, **Appendix 5**. Taking account of the Sainsbury Newhaven extension (estimated £12.2m) removes all of the turnover capacity in Newhaven until beyond 2021. In Lewes, the Tesco extension (£7.8m) reduces the quantitative comparison goods capacity over the study period in the town.

Retail Services Floorspace Need

5.52 Commensurate with the level of convenience and comparison goods shopping floorspace need, it is possible to assess the potential need for additional retail service floorspace required, to maintain the balance of overall composition in each of the centres. The existing proportions and of retail services within each of Lewes's main town centres based on gross floorspace and number of units are:

TABLE 5.6: Existing Proportions of Retail Services in Lewes Districts Main Centres

Centre	Floorspace %	Units %
Lewes	31%	38%
Seaford	41%	48%
Newhaven	30%	44%
Peacehaven Meridian	10%	47%
Peacehaven South Coast	52%	60%

5.53 The retail service needs analysis is provided at **Appendix 6** and the results are explained in section 7 of this report which draws together the convenience, comparison and service goods floorspace needs and identifies the overall quantum of floorspace required for each town in gross floorspace terms.

Conclusions/Issues

5.54 It should be acknowledged that, particularly for comparison goods shopping, the trading density of floorspace can vary widely and the ability of existing floorspace to turnover at a higher level by trading more efficiently means that the capacity identified can in part be absorbed by existing floorspace.

5.55 In addition, the quantitative need for floorspace should be balanced with and reviewed in light of a number of qualitative considerations such as:

- evidence of overtrading

- the quality of and gaps in existing retail provision
- consumer choice and competition issues
- existing levels of market share and potential to influence that market share through appropriate retail developments
- regeneration priorities
- creating more sustainable patterns of shopping
- retailer demand

5.56 We go on to consider these qualitative factors in the next section.

6. QUALITATIVE RETAIL ASSESSMENT

Introduction

6.1 The PPS4 Practice Guidance identifies five main factors that should be considered when assessing qualitative retail need, namely:

- Deficiencies or 'gaps' in existing provision;
- Consumer choice and competition;
- Overtrading, congestion and overcrowding of existing stores;
- Location specific needs such as deprived areas and underserved markets; and,
- The quality of existing provision.

6.2 This section provides a brief qualitative overview of shopping provision within the District's main town centres with reference to the above considerations. More detailed analysis of the town centres is provided in the health checks at **Appendix 3**.

Lewes town centre

6.3 Lewes is an attractive historic centre. It is the largest retail centre of the four main shopping locations within the District but under the present retail hierarchy is afforded the same status as Seaford, Newhaven and Peacehaven.

6.4 Convenience shopping provision in the town centre is focused on the in-centre Waitrose store (net sales area 1,560 sqm). This was converted from a Safeway, then briefly Morrisons, store in 2005 and whilst capable of satisfying main food shopping needs, it is a congested, compromised store that is further constrained by a small poorly configured and busy car park (80 spaces).

6.5 Other convenience shopping opportunities in the town centre are provided by local independent and specialist traders including a health food shop, a bakery, a specialist cheese shop, a grocery shop, two delicatessens, off-licence/wine merchant and traditional convenience traders at the Riverside Hall shopping area. This convenience shopping provision is supplemented by the Lewes Foodmarket which operates every Friday at the Lewes Market Tower, Market Street and a monthly farmers market on Cliffe High Street.

6.6 Beyond the immediate town centre area at Brooks Road there is a larger Tesco store (2,120 sqm net) that provides for main food shopping needs and in the same location there is a recently opened Aldi supermarket.

6.7 Given the ample and relatively unrestricted parking available at Tesco, together with the more extensive convenience offer, the Tesco is more popular relative to the Waitrose store.

6.8 This is demonstrated by the shopping patterns revealed by the household survey with a larger proportion of residents using the Tesco store over Waitrose both within the core Lewes zones and across the Study Area where comparative usage is 10.6% vs 7.3%. Within Lewes' home zone (Zone 1), the Waitrose store secures just under 30% of overall convenience shopping visits. This is in contrast to 41% using to the Tesco store. However, it is notable that the Waitrose outperforms the Tesco store as a top-up shopping destination taking 30% to Tesco's 23% in the home zone.

6.9 In terms of trading performance, the market share analysis shows modest levels of overtrading (less than £1m per annum) within both the Tesco and Waitrose stores which increases by a small margin over the study period (Table I, **Appendix 5**). This modest overtrading is evidenced by visual inspections of the stores and they are consistently busy. The issue of overtrading is perhaps more manifest in the Waitrose store which does show signs of stocking issues and out-of stocks, in-store congestion and customer queuing. It is likely that given the compromised nature of the Waitrose store and its customer car parking that the retailer will have a lower turnover expectation of this particular store relative to company average trading benchmarks.

6.10 Based upon market shares, the new Aldi store is shown to be underperforming and visits to this store confirm it is quieter than both Tesco and Waitrose. This store had only recently opened when the household survey was undertaken and it is anticipated that over time as it becomes established that its turnover will improve.

6.11 In qualitative terms, the existing provision of convenience goods shopping in Lewes is considered adequate. The two main food stores and the food discounter are bolstered by traditional and artisan food shopping which provides a diversity of choice.

6.12 For comparison goods shopping, Lewes's attraction as a day visitor and tourist destination is evidenced in its comparison goods offer as this predominantly comprises local independent traders selling gifts, crafts, jewellery and antiques, furniture and furnishings and clothing boutiques. The town caters primarily to the higher end of the market, both in terms of its national multiples and independent stores.

6.13 Trading performance based upon market share levels for comparison goods shopping suggests that Lewes town centres facilities achieve a turnover of around £50m (in 2012) which equates to a trading density of around £4,100/sqm which is a little below the £4,500/sqm level we would have anticipated for a centre of its size, function and retail mix. These figures suggest an element of under trading but this is not particularly manifest on the ground, as stores generally appear to be trading reasonably well. Lewes's locally derived turnover is however bolstered by tourist and day visitor spending which will make a contribution to the overall turnover of the town centres comparison goods stores and retail services particularly catering/food and drink uses. We consider that there is potential for the existing comparison goods shopping floorspace to trade more intensively.

6.14 Mainstream comparison shopping particularly clothing and footwear and the leisure/recreation/electronic sectors is somewhat limited and this is confirmed by the outflow of shopping trips from Lewes to Brighton and Eastbourne to make these purchases. This trade leakage is not that surprising given the proximity and good train links between Lewes and Brighton/Eastbourne and the significant shopping pull of these much larger comparison goods focused sub-regional shopping centres.

6.15 The historic fabric of the town results in a large number of smaller potentially compromised retail units. These units are generally more appropriate, attractive and acceptable to independent retailers rather than national multiple retailers which with their less flexible format driven retailing are typically seeking larger more standard shaped units to accommodate their established trading formats. It is notable that the few national multiples which do trade in Lewes are generally concentrated within the more modern Friars complex at the foot of the High Street. That is not to say however that all national multiple trades eschew historic centres and small irregular shop units, these characteristics suit some national multiples and retailers such as Crew and Fat Face that occupy units within Lewes.

6.16 The proximity of Lewes to major town centres allied with its historic fabric and the generally smaller and constrained shopping units place limitations upon its potential to attract more mainstream national multiple shopping.

6.17 In qualitative terms given that Lewes only secures 12% of the overall comparison spend across the District, there would appear to be some scope to improve Lewes market share with the right mix of retail provision. In our view that potential would be best achieved by seeking to capture mainstream clothing, footwear, leisure and recreation goods retailing. This would help to retain some shopping trips which are currently going to Brighton, Eastbourne and even more distant centres. This will however only occur if larger space units suited to such multiple traders' requirements are provided. However, given the constrained nature of the existing town centre the scope to achieve this is somewhat limited.

6.18 The level of retail service uses and particularly A3-A5 uses is strong in Lewes and there are a range of eating and drinking establishments which appear popular during shopping times and also extend activity in the town centre into the evening.

6.19 Car parking within and around Lewes Town centre is provided by a mix of on-street short stay and and off-street car parking for both shopper (short stay) and longer/day visitors. Our own visits to Lewes have not highlighted any significant car parking capacity issues around the eastern (bottom) end of High Street/Cliffe High Street where off street surface level car parking is available Eastgate, Railway Lane/Friars Walk, Harveys Way and at Brooks Road (Tesco). The upper western part of High Street is less well provided with car parking comprising limited on street parking and a smaller off street pay and display car parks at Westgate and West Street. This however is the historic heart of Lewes and given heritage and conservation constraints it would be difficult to improve car parking provision in this part of the town.

6.20 Generally whilst car parking capacity does exist around Lewes town centre, the directional signage for the off-street car parking facilities is poor.

6.21 There is a clear tension in Lewes between preserving its existing tourist shopping and service role by maintaining its retail distinctiveness and by seeking to enhance its everyday and mainstream comparison goods shopping provision to better meet the shopping needs of its local residents. However the potential to redevelop parts of the town centre is very limited given the historic and conservation area constraints.

6.22 This tension and the importance to the town of its distinctive character was evidenced in discussions at the stakeholder session which was attended by a range of retailers, businesses, and agencies with interests in Lewes. The stakeholder comments highlighted a range of issues both positive and negative. These included:

- Lewes has been relatively unaffected by recent economic conditions.
- Tesco is a good anchor encouraging shoppers to come into the town centre but it needs investment.
- Waitrose makes a good contribution to the town centre and the community.
- Lewes has a lively evening economy.
- Lewes is a good start up location for independent retailers.
- Support is required to retain and encourage Lewes's distinct and independent retail offer.
- More active and co-ordinated marketing is required for Lewes.
- An additional food supermarket/superstore in Lewes is not needed.
- Parking issues relating to signage and capacity.
- Recent concern over shop break-ins and graffiti.
- The public sector employment base in the town centre makes a positive contribution to the daytime economy but concerns were expressed over public service cuts.
- The National Park designation has had no effect on the town.

6.23 In summary, Lewes town centre is a very attractive and character filled centre, with a distinctive independent led retail character and a good range of retail services catering for both locals and visitors. We consider that the town centre is vital and viable.

Newhaven

6.24 Newhaven town centre has seen significant decline in its retail attraction and function over recent years. The town centre now has a very limited level of retail and retail service provision and the town centre's environment has been negatively affected as a result.

6.25 The out-of-centre retail offer at Newhaven, both convenience and comparison goods shopping, offers a greater range, choice and quantum than is available in the town centre. This is so much the case that the out of centre facilities are now effectively considered as comprising 'Newhaven town centre' hence the anomalous and high market share implied by the household survey results for Newhaven town centre. *Prima facie* they suggest a high level of turnover is being achieved by Newhaven town centre but this is not confirmed by on the ground checking which actually suggests the town centre is not performing well. A partial re-survey of the household survey respondents who shopped in Newhaven has been undertaken and this has confirmed that the out-of-centre retail facilities are viewed as Newhaven's main shopping area.

6.26 Newhaven town centre's convenience shopping offer is based around the 1,500 sqm net Co-op store (formerly Somerfield) at the dated Newhaven Square shopping precinct development. The Co-op foodstore is somewhat tucked away and does not integrate particularly well with the High Street shopping area, it has also faces significant competition from the nearby out of centre retail development which has attracted trade away from the town centre. Additional convenience shopping in Newhaven town centre is limited to an off-licence, bakers and health food store.

6.27 The main food convenience shopping function at Newhaven is fulfilled by the Sainsbury's superstore located to the east of the town centre at the Drove. It is a large modern store with extensive ranges of food and grocery goods. In addition, in this area there is a Lidl store which further adds to the out-of-centre retail provision at Newhaven.

6.28 In terms of market share and trading performance, the Sainsbury store is the dominant food store in this location, achieving strong sales and overtrading to a significant degree (circa £8m in 2012, Table I, **Appendix 5**). Visits to this store confirm that it trades well and does show some signs of overtrading including a busy and congested car park. The Lidl store is also shown to be trading at a good level. The strong trading of these food stores is in stark contrast to the market share based turnover of the Co-Op store which on the basis of our capacity analysis is under trading relative to

Co-Op company benchmark levels, visits to this store confirm it is quiet and not being used to any significant extent for larger main food shopping.

6.29 The existing food shopping provision in Newhaven both in and out of centre is in our view reasonable although the level of overtrading does however present a qualitative case for providing additional food shopping floorspace.

6.30 Furthermore, the current mixed-use applications for primarily superstore based convenience-led retailing outside the town centre; do demonstrate there is retailer demand in this location.

6.31 Comparison goods shopping in Newhaven town centre is limited and, aside from Boots, is focused predominately on the lower end of the market, with clothing representation from Peacocks and household goods from Poundstretcher.

6.32 Notwithstanding the poor level of shopping provision within Newhaven town centre, there remains a reasonable range and choice of retail service type uses available in terms of restaurants, cafes, estate agents and hairdressers banks etc. It is broadly considered that it is this retail service provision rather than the shopping offer which now motivates visits to the town centre.

6.33 Accessibility into Newhaven town centre is via a poorly signed routes off the A259 (North Way/South Way) which forms a busy gyratory around the town centre area. The main car parking for Newhaven town centre is provided by a poorly configured multi-storey at Dacre Road adjacent to Newhaven Square.

6.34 Stakeholder feedback on Newhaven highlighted the effective stranglehold of the A259 around the town centre as an important issue to address. Other issues highlighted included:

- The loss of Woolworths from the town centre was significant and trade has fallen since then.
- Apart from the Co-Op there is no other retail based reason to go into the town centre.
- Local impression is of a ghost town, with little or no reason to invest in the town centre.
- The multi-storey car park should be removed.
- More should be made of the historical context of Newhaven and the river corridor and marina.

6.35 The out-of-centre comparison goods retail offer in Newhaven is more significant than that available in centre. There is retail warehousing at the Drove (Halfords, Pets at Home, Carpetright, B&Q and the Original Factory Store) further comparison goods shopping is provided in Lidl and Sainsbury. This will be enhanced further by the committed Sainsbury's extension (1,937 sqm net) primarily for additional comparison floorspace.

6.36 The out-of-centre shopping in Newhaven (both convenience and comparison) attracts trade from along the coastal part of Lewes District from Seaford in the east to Peacehaven in the west.

6.37 Qualitatively, there is considered to be scope for improvement in Newhaven town centre's retail offer. This is particularly true given the centre's strategic location within the District, effectively midway between Brighton and Eastbourne and more locally lying between Peacehaven and Seaford. However, care must be taken to ensure that any development which is permitted does not simply consolidate the dominance of the existing out-of-centre retailing as this would have a significantly adverse impact upon and already fragile town centre.

6.38 However we are aware that the findings of the earlier 2005 Retail Study made the suggestion that a wider range of retail services would be appropriate for the existing town centre (within the ring road). Even then Newhaven town centre was considered to be struggling and now with the effects of the economic downturn and further erosion of its retail function due to edge- and out-of-centre retailing, the prospects for a retail-led regeneration in Newhaven town centre are considered limited.

6.39 The downgrading of Newhaven town centre must be a strategic decision. Whilst we can see a strategy based upon downgrading existing shopping to a more local, specialist or niche role together with encouraging retail service, leisure, commercial, office, tourism, cultural and community uses with an increase in residential as potential new focus for the town centre could succeed. In order for this to be a success, measures to maximise the potential of linked trips and spending attracted into the town centre from the out of centre retail provision will be crucial to securing the viability of Newhaven town centre.

6.40 Therefore, if the strategy is to 'downgrade' the existing shopping function of Newhaven town centre, we would suggest that any further future retail development should be very well related to the town centre in physical and linkages terms as this will be key to supporting and enhancing the re-focused existing town centre area.

6.41 In summary, Newhaven town centre's vitality and viability is poor. The scope to turn around the decline of the town centre's retail fortunes is in our view limited given the significance and dominance of the out of centre retail facilities. The town centre could be refocused to provide a range of other town centre uses such as retail services, commercial, office, residential and community uses which would improve activity within the centre and should in turn encourage some retail improvements.

Seaford

6.42 Seaford is a compact town centre which benefits from being anchored by a large Morrisons supermarket which is a key attractor of shoppers into the town centre and generates footfall and linked trips and spending for the entire town centre.

6.43 Additional convenience retailing is provided by national multiple and local independent traders: the centre has retained its traditional convenience retailers (fishmonger, butcher, baker, greengrocer) which bolster the main food offer and provide diversity, choice and competition.

6.44 Trading performance of the existing convenience trades is good and the market share based analysis suggests that the Morrisons store trades at a level slightly beyond company average, as does the Co-op store in the town centre, the existing local independent food stores are also identified as trading well. Inspections confirm these results. The Morrisons store is a little dated in terms of its internal fittings and layout and would benefit from a refit/refresh.

6.45 In terms of the level of food shopping provision, the range and choice of stores and goods available is very reasonable and we do not consider there is any overriding qualitative need to improve upon the existing level of shopping provision.

6.46 Comparison goods shopping provision is in our view relatively good given the size of Seaford. There are some national multiple traders including fashion retail and the centre also has a range and choice of other comparison goods shopping categories including some specialist and niche type retailers.

6.47 The trading performance of Seaford based upon our market share turnover analysis does suggest collectively that the existing comparison traders are performing at levels beyond our trading expectations, achieving a trading density of over £5,000/sqm whereas for a centre of its size and the mix of retailers present we would expect a trading density of £4,000/sqm. Visits to the centre confirm that the town is generally busy with good levels of footfall. There is no evidence that existing comparison retailers are particularly struggling to maintain trade at viable levels nor do they appear to be overtrading to any harmful level.

6.48 Service provision within Seaford is reasonable with a range of eating and drinking establishments, the main high street financial services are represented and there is a good range of retail/business support services. There are pubs and restaurants which provide some evening activity.

6.49 Car parking within the centre comprises a mix of off-street and on-street parking with an ample overall supply when the parking capacity at the Esplanade is included. Some improvement to signage for Seaford's car parking and directional signage to improve routing from the seafront to the town centre would benefit the town.

6.50 Feedback from the stakeholder event relating to Seaford identified the following issues:

- There had been a gradual decline in the range and choice of shopping in Seaford, particularly clothing and footwear.
- Too many charity shops.
- Business rates in Seaford are high relative to Lewes.
- Whilst Seaford has a tourist role, this provides limited spin off benefit to town centre retail businesses.
- Need for a co-ordinated marketing strategy to promote Seaford town centre and its tourist attractions.
- The town needs a sense of arrival, the route of the A259 through the town means that potential visitors drive through without realising what is available.
- Linkages between the town centre and the seafront need to be identified and improved.
- There is a shortage of commercial/office premises in Seaford.
- Seaford has a distinct character and redevelopment would not be acceptable.

6.51 The stakeholders also raised concerns over the potential impact on Seaford of the proposed retail led mixed use developments at Newhaven.

6.52 We consider that Seaford performs well and is vital and viable town centre. There is, in our view, no overriding qualitative need for additional retail facilities in Seaford.

Peacehaven

6.53 Peacehaven is a 'centre' of two distinct parts. The Meridian Centre is a functional retail location anchored by a Co-Op supermarket and benefitting from extensive surface level parking and co-location with health and leisure centres. South Coast Road/Telscombe Cliffs in contrast is a very elongated centre without any real focus or core.

6.54 The Meridian Centre is the more important location in retail terms although the diversity of retail and individual retailers at South Coast Road does make it a destination for specific goods such as domestic electrical shopping.

6.55 Qualitatively we consider that the Meridian Centre performs at a reasonable level. Visits to the centre confirm that the existing facilities are well patronised and the market share based analysis suggests that both the food and comparison goods shopping provision is performing at a good level.

We do not consider there is any significant qualitative need to warrant expansion to the existing facilities.

6.56 The South Coast Road area has a more localised food shopping function and qualitatively we consider the Sainsbury's Local and independent food stores adequately provide for the shopping needs in this location. In terms of comparison goods shopping the role of South Coast Road is very limited and we do not consider there is any qualitative need which would justify additional non-food shopping provision.

6.57 Stakeholder feedback on Peacehaven indicated that the Meridian Centre's performance has improved since the refurbishment of the Co-Op store and trading is now steady. The strengths of the centre were identified as being its convenient location for Peacehaven's residents, its free car parking and co-location with the new health centre. The new Sainsbury's Local on South Coast Road was regarded as a positive improvement. There was concern expressed about the potential impact on Peacehaven from the proposed retail development in Newhaven.

6.58 Overall, we consider that the Meridian Centre is performing reasonably well and its vitality and viability is boosted by the attraction of the nearby leisure and health facilities. South Coast Road is a less busy centre and, although not perceived to struggling in terms of vitality and viability, its retail function is somewhat limited.

7. FUTURE RETAIL NEEDS

7.1 In this section we draw together the quantitative and qualitative retail analysis to provide a summary of the retail need analysis. The results are presented for convenience goods, comparison goods and cumulatively a total retail floorspace need is provided which includes retail service floorspace.

Lewes

7.2 The quantitative capacity established by the Study is summarised in the two tables below. These summary tables have drawn together the separate analysis for the town centre and out-of-centre facilities; the commitment to extend Tesco also has to be factored into the analysis.

TABLE 7.1: LEWES QUANTITATIVE CAPACITY SUMMARY TABLE - Convenience goods

	2012	2016	2021	2026	2030
LEWES TOWN CENTRE	£0.80	£1.25	£1.77	£2.38	£2.88
LEWES OUTSIDE TOWN CENTRE	-£3.10	-£2.44	-£1.66	-£0.77	-£0.04
LEWES COMBINED TURNOVER CAPACITY	-£2.30	-£1.19	£0.11	£1.61	£2.84
LEWES FLOORSPACE CAPACITY (Sales Area sqm)	-192	-99	9	134	237
LEWES FLOORSPACE CAPACITY (Gross Area)	Nil	Nil	16	223	393

Notes: Sales density of £12,000/sqm applied to turnover capacity estimates. Sales area is assumed as 60% of gross area.

TABLE 7.2: LEWES QUANTITATIVE CAPACITY SUMMARY TABLE - Comparison goods

	2012	2016	2021	2026	2030
LEWES COMBINED TURNOVER CAPACITY	-£2.11	£0.55	£4.43	£9.38	£13.10
LEWES FLOORSPACE CAPACITY	-527	137	1,107	2,345	3,274
COMMITTED NEW COMPARISON GOODS FLOORSPACE	930	930	930	930	930
LEWES FLOORSPACE CAPACITY (Sales Area sqm)	-1,457	-793	177	1,415	2,344
LEWES FLOORSPACE CAPACITY (Gross Area)	Nil	Nil	271	2,165	3,586

Notes: Sales density of £4,000/sqm applied to turnover capacity estimates. Sales area is assumed as 65% of gross

TABLE 7.3: LEWES COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED

		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	Nil	Nil	16	223	393
Comparison Goods Floorspace Need	sqm (gross)	Nil	Nil	271	2,165	3,586
Total Retail		Nil	Nil	286	2,388	3,979
Proportion of Retail Service Trades (Existing)		31%	31%	31%	31%	31%
Total Floorspace Need		Nil	Nil	375	3,129	5,212

7.3 Whilst the study does not find an overriding quantitative need for additional shopping floorspace in Lewes over the next 10 years for which we consider the Council need to make specific site allocations, the qualitative need to provide a more diverse range of retail offer to arrest some of the shopping outflow and to provide modern retail floorspace to match the demands of national multiple retailing is persuasive.

7.4 However the scope to accommodate additional retail development is limited given the historical and conservation area protections across much of the town centre. Car parking within and around the town centre is well utilised and the scope for redevelopment of any of the main town centre shopper car parks is in our view limited given existing usage and the requirement of these facilities to support the town.

7.5 The lower (eastern) end of High Street appears to offer the best potential location for any additional retail development, particularly to the north extending along the River Ouse in a similar way to the Tesco development. The Tesco development should not be considered a guiding principle to any retail-based development on the opposite side of the river. Any retail expansion here would however have to overcome potential integration issues and provide measures to secure strong pedestrian linkage with the rest of the town centre along as well as addressing the retail considerations of scale, impact. Design quality would also be paramount.

Newhaven

7.6 This study has highlighted the existing poor performance of Newhaven town centre and contrasted this with the relative success and stronger trading performance of the out-of-centre facilities serving Newhaven and the wider coastal Lewes District area extending from Seaford in the east to Peacehaven in the west.

7.7 In quantitative terms, there is a need for additional convenience and comparison goods floorspace as illustrated in the tables below. This analysis has combined the capacity results for the in-centre and out-of-centre shopping provision to establish a global need figure for Newhaven. The commitment to extend Sainsbury has also been accounted for:

TABLE 7.4: NEWHAVEN QUANTITATIVE CAPACITY SUMMARY TABLE - Convenience goods

	2012	2016	2021	2026	2030
NEWHAVEN TOWN CENTRE	-£4.41	-£4.28	-£4.12	-£3.94	-£3.79
NEWHAVEN OUTSIDE TOWN CENTRE	£9.87	£10.70	£11.66	£12.77	£13.68
NEWHAVEN COMBINED TURNOVER CAPACITY	£5.46	£6.42	£7.54	£8.83	£9.89
NEWHAVEN FLOORSPACE CAPACITY (Sales Area sqm)	455	535	628	736	824
NEWHAVEN FLOORSPACE CAPACITY (Gross Area sqm)	755	888	1,043	1,222	1,368

Notes: Sales density of £12,000/sqm applied to turnover capacity estimates. Sales area is assumed as 60% of gross area.

TABLE 7.5: NEWHAVEN QUANTITATIVE CAPACITY SUMMARY TABLE - Comparison goods					
	2012	2016	2021	2026	2030
NEWHAVEN COMBINED TURNOVER CAPACITY	£7.95	£10.08	£13.13	£16.87	£19.94
NEWHAVEN FLOORSPACE CAPACITY	1,987	2,520	3,282	4,217	4,985
COMMITTED NEW COMPARISON GOODS FLOORSPACE	1,740	1,740	1,740	1,740	1,740
NEWHAVEN NEW FLOORSPACE REQUIREMENT (Sales sqm)	247	780	1,542	2,477	3,245
NEWHAVEN NEW FLOORSPACE REQUIREMENT (Gross sqm)	377	1,194	2,359	3,790	4,965
Notes: Sales density of £4,000/sqm applied to turnover capacity estimates. Sales area is assumed as 65% of gross					

TABLE 7.6: NEWHAVEN COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	755	888	1,043	1,222	1,368
Comparison Goods Floorspace Need	sqm (gross)	377	1,194	2,359	3,790	4,965
Total Retail		1,133	2,081	3,402	5,012	6,333
Proportion of Retail Service Trades (Existing)		30%	30%	30%	30%	30%
Total Floorspace Need		1,472	2,706	4,423	6,516	8,233

7.8 These floorspace need estimates fall short in quantitative turnover and floorspace need terms of supporting the proposed food superstore based proposals at Newhaven. However, if the intention is to downgrade the shopping role of the town centre, then it is anticipated that the Co-op store in the town centre may be reduced in size and may be refocused to a more local convenience format. Furthermore, the under-trading at the town centre store pulls down the theoretical capacity and if this was disregarded convenience goods turnover capacity would be increased by circa £5m equivalent to around 400sqm of additional floorspace.

7.9 There is in our view a qualitative need arising from the limited range and choice in existing stores and the potential to secure regeneration of Newhaven town centre.

7.10 A further consideration is the strategic geographical location of Newhaven and this could potentially be the location to satisfy the combined shopping needs of the Newhaven/Peacehaven/Seaford area.

Seaford

7.11 At Seaford, the Study has highlighted a quantitative need for a modest level of convenience and comparison goods. The convenience goods need is summarised in the table below, we do not consider this level of need merits a specific allocation and there is not in our view a strong quantitative case for additional convenience goods shopping. Rather, the existing convenience goods retailers could readily absorb much of this capacity without suffering any significant or damaging effects of overtrading.

TABLE 7.7: SEAFORD QUANTITATIVE CAPACITY SUMMARY TABLE - Convenience goods					
	2012	2016	2021	2026	2030
SEAFORD TURNOVER CAPACITY	£6.41	£7.19	£8.11	£9.17	£10.04
SEAFORD FLOORSPACE CAPACITY (Sales Area sqm)	534	599	676	764	836
SEAFORD FLOORSPACE CAPACITY (Gross Area sqm)	886	995	1,122	1,268	1,388
Notes: Sales density of £12,000/sqm applied to turnover capacity estimates. Sales area is assumed as 60% of gross area.					

7.12 As highlighted earlier in this section, additional retail provision at Newhaven could address some of the identified convenience goods capacity we have identified at Seaford.

7.13 The quantitative capacity for additional comparison goods shopping to serve the future needs of Seaford are summarised below, together with a theoretical indication of the total retail and retail service trades floorspace (in gross terms) that could be supported up to 2030.

TABLE 7.8 SEAFORD QUANTITATIVE CAPACITY SUMMARY TABLE - Comparison goods					
	2012	2016	2021	2026	2030
SEAFORD TURNOVER CAPACITY	£6.79	£8.78	£11.62	£15.11	£17.96
SEAFORD NEW FLOORSPACE REQUIREMENT (Sales sqm)	1,699	2,195	2,904	3,777	4,489
SEAFORD NEW FLOORSPACE REQUIREMENT (Gross sqm)	2,599	3,358	4,443	5,778	6,868
Notes: Sales density of £4,000/sqm applied to turnover capacity estimates. Sales area is assumed as 65% of gross					

TABLE 7.9: SEAFORD COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	886	995	1,122	1,268	1,388
Comparison Goods Floorspace Need	sqm (gross)	2,599	3,358	4,443	5,778	6,868
Total Retail		3,485	4,352	5,565	7,047	8,256
Proportion of Retail Service Trades (Existing)		41%	41%	41%	41%	41%
Total Floorspace Need		4,914	6,137	7,846	9,936	11,641

7.14 Whilst these theoretical floorspace estimates suggest there is some need for additional floorspace; qualitatively, given the size and status of Seaford, we do not believe there is an overriding need to plan to meet this need over the short to medium term as this level of turnover capacity can readily be absorbed by improved trading by the existing retailers.

7.15 Overall in Seaford we consider, notwithstanding the identified quantitative retail need that there is not a pressing requirement to expand Seaford’s existing retail offer. The comparison goods floorspace could trade more intensively (and profitably) without any detrimental effect in terms of overtrading manifest in congestion or stock shortages. The convenience offer could be expanded to address overtrading but this should be sensitively considered in order to insure that impact upon existing retailers is not significantly adverse. One option to explore would be the potential to extend the rather ‘tired’ existing Morrisons store.

Peacehaven

7.16 At Peacehaven, the Study has identified a low level of overall need for additional floorspace which is focused upon the Meridian Centre, the main functional shopping location in Peacehaven.

7.17 The quantitative need identified does not in our view require a specific site allocation as the theoretical level of turnover capacity for both convenience and comparison goods can be readily absorbed by the existing floorspace trading more efficiently and intensively. The qualitative analysis confirms that there is no overtrading stress which needs to be remedied.

7.18 The tables below illustrate the theoretical convenience, comparison and overall (gross) retail floorspace requirements at Peacehaven to 2030.

TABLE 7.10: PEACEHAVEN QUANTITATIVE CAPACITY SUMMARY TABLE - Convenience goods

	2012	2016	2021	2026	2030
PEACEHAVEN MERIDIAN TURNOVER CAPACITY	£0.28	£0.54	£0.85	£1.20	£1.49
PEACEHAVEN SOUTH COAST TURNOVER CAPACITY	-£0.67	-£0.57	-£0.45	-£0.31	-£0.19
PEACEHAVEN COMBINED TURNOVER CAPACITY	-£0.39	-£0.02	£0.41	£0.90	£1.30
PEACEHAVEN FLOORSPACE CAPACITY (Sales Area sqm)	Nil	Nil	34	75	108
PEACEHAVEN FLOORSPACE CAPACITY (Gross Area)	Nil	Nil	56	124	180

Notes: Sales density of £12,000/sqm applied to turnover capacity estimates. Sales area is assumed as 60% of gross area.

TABLE 7.11: PEACEHAVEN QUANTITATIVE CAPACITY SUMMARY TABLE - Comparison goods

	2012	2016	2021	2026	2030
PEACEHAVEN COMBINED TURNOVER CAPACITY	£2.22	£2.94	£3.98	£5.26	£6.30
PEACEHAVEN NEW FLOORSPACE REQUIREMENT (Sales sqm)	555	736	995	1,315	1,574
PEACEHAVEN NEW FLOORSPACE REQUIREMENT (Gross sqm)	849	1,126	1,522	2,012	2,408

Notes: Sales density of £4,000/sqm applied to turnover capacity estimates. Sales area is assumed as 65% of gross

TABLE 7.12: PEACEHAVEN COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED

		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	Nil	Nil	56	124	180
Comparison Goods Floorspace Need	sqm (gross)	849	1,126	1,522	2,012	2,408
Total Retail	sqm (gross)	849	1,126	1,578	2,136	2,588
Proportion of Retail Service Trades (Existing)		31%	31%	31%	31%	31%
Total Floorspace Need	sqm (gross)	1,113	1,475	2,068	2,798	3,390

8. SHOPPING HIERARCHY AND POLICY RECOMENDATIONS

Introduction

8.1 In this section we address the requirements of the Study brief requiring the identification of the shopping hierarchy of the District and providing policy recommendations for the period up to 2030 in terms of shopping and town centres. We commence with a brief review of the policy recommendations of the 2005 Retail Study; then provide our suggested local retail hierarchy for the District. Having established that and mindful of the previous policy recommendations, we go on to suggest some appropriate retail and town centre policies flowing from our analysis.

Review of Policy Recommendations from the 2005 Study

8.2 The previous 2005 Retail (and Leisure) Study prepared for Lewes District Council by GVA Grimley made a number of policy and initiative recommendations on a centre by centre basis relating to strategy, development control, site specific considerations.

8.3 We provide below a brief summary of the 2005 recommendations.

Lewes

- *Strategy:*
  - *Promoted as the main focus for retail activity in the District but do not anticipate major expansion;*
  - *Any new investment to be directed into the town centre, including seeking improvements to the convenience offer;*
  - *New development should reinforce the centre's distinctive character whilst at the same time provide the 'critical mass' required to cement the position of the centre at the top of District's hierarchy [NB: We are not sure that 'critical mass' is what was really meant – particularly in light of the first recommendation]*
  - *Expectation that any new development would be anchored by the improved convenience offer and include comparison, leisure and potentially visitor facilities. It is considered important that any new development is well integrated with the centre.*
- *Development Control:*
  - *Amendments suggested to the town centre boundary to remove more disparate elements including the Tesco store which is not considered to form part of the town centre and is instead regarded as edge of centre.*
  - *If any edge-of-centre development opportunities arise, there may be scope for extending the town centre boundary to include, provided the development is well integrated.*
  - *Support improvements to leisure provision in the town centre.*

- *In shopping frontage terms, differentiate between primary (The Precinct and Cliffe High Street) and secondary (High Street towards School Hill) frontages to identify some sort of 'prime retail focus' in centre. More diverse uses should be promoted in peripheral areas, with retail activity focused on the primary shopping frontages.*
- *Any development outside the town centre should be subject to criteria-based policy to demonstrate need, compliance to the sequential approach, 'no impact' on the vitality and viability of centres and accessibility by a range of transport modes.*

- *Site specific:*
    - *Allocation of Eastgate Centre to improve the foodstore, enhance frontages onto the Friars and 'better utilise' the Eastgate car park.*
- *Additional initiatives:*
    - *Regular review of management, operation and pricing of existing car parking and exploring opportunities within all developments for additional town centre parking.*
    - *Promotion of the town as a visitor destination.*
    - *Exploration of opportunities for new visitor attractions if any large-scale developments come forward.*
    - *Potential for a town centre manager*

Newhaven

- *Strategy:*
    - *Reclassify as a District Centre on the basis the town will not be able to establish itself as a prominent retail destination in the District but acknowledging the role it has to play in meeting local needs.*
    - *Limited scope for further in-centre floorspace but the aim should be to enhance the existing main food anchor.*
    - *Enhance the centre's wider appeal to tourist visitors.*
- *Development Control:*
    - *Resist any out-of-centre retail development and include a criteria-based policy reflecting the appropriate PPS6 tests.*
    - *Promote enhancement of town centre along with Denton Island, the marina and the Fort, ensuring any development in these areas is well-linked to the centre.*
    - *Support the identified primary shopping area (Newhaven Square and the High Street) and the identification of the ring road as the town centre boundary.*
    - *Railway Quay, although out of centre and therefore subject to the then-relevant PPS6, is identified as an opportunity provided it complements and is well-linked to the existing centre and does not function as a standalone destination. That said, general retailing is not regarded as suitable and commercial development should only be ancillary to residential.*
- *Site specific:*

- *Newhaven Square: the then-Somerfield is identified as trading strongly and redevelopment, including reconfiguration of the car park, is supported to enhance the food retail offer in the town centre.*
- *Royal Mail sorting office (54 High Street): mixed-use development opportunity if the site becomes available over the plan period, subject to Royal Mail moving their sorting operations elsewhere.*
- *1-13 Bridge Street: mixed-use redevelopment including A1 and A3 uses.*

- *Additional initiatives*
  - *Encourage residential development through the town centre to reinforce vitality and viability.*
  - *Develop a tourist/visitor strategy to promote the marina, the Fort and beach, including enhancement of linkages to the town centre.*

Peacehaven

- *Strategy:*
  - *Define the two centres separately given there are no physical links and they function separately.*
  - *The Meridian Centre should be defined as a District Centre and a focus for new town centre development. South Coast Road should be defined as a local centre to ensure it continues to retain passing trade within Peacehaven.*
- *Development Control:*
  - *Identify the Meridian Centre building as the primary shopping area. The broader town centre boundary should incorporate the surgery, library, Council offices and leisure centre.*
  - *No primary shopping area to be identified at South Coast Road on the basis it would serve little purpose given the disparate nature of the centre. LDF policy should make clear that town-centre development will be appropriate within the defined boundary provided it is of an appropriate scale.*
  - *PPS6 criteria-based policies are proposed for any development outwith the centres.*
- *Site specific:*
  - *Meridian Centre: support enhancement to the Co-op store.*
  - *De-allocation of industrial units to the east of the Meridian Centre for leisure development on the basis this use extends beyond the recommended 'local' function of the centre.*

Seaford

- *Strategy:*
  - *Function as a 'town centre' in PPS6-terms [NB. unlike other centres, no explicit recommendation on position in the hierarchy]*
  - *Consolidate existing provision and build on strengths to increase market share.*
- *Development Control:*

    - *Limited capacity for new retail or leisure floorspace in the town centre. Retail uses should be encouraged in the primary shopping area, with more diverse uses promoted in the peripheral areas.*
    - *Maintain the primary frontages as identified in the Local Plan.*
    - *Amend the town centre boundary to remove a number of areas that do not presently function as part of the centre.*
- *Site specific:*
    - *Encourage enhancement to the Safeway [Morrisons] store.*
- *Additional initiatives:*
    - *Promote Seaford as a visitor attraction.*

Local Shopping

- *Retain important shops and ensure local parades remain a vibrant focus for the local community. Given viability issues with local shopping provision, policy should allow for flexibility for alternative proposals on their own merits*

Monitoring

- *Councils are obliged to compile Annual Monitoring Reports.*
- *Future retail proposals assessed with regard to commitments and proposals in other centres, changes in retail occupiers, the vitality and viability of the centre and development opportunities and the extent to which the proposal might impact on the adopted retail and leisure strategy.*

8.4 The majority of the 2005 recommendations remain relevant, the site specific and initiative aspects particularly so. We provide further detail in our own recommendations below.

Shopping Hierarchy

8.5 We have reviewed the existing shopping provision and functioning of the main shopping centres within Lewes District including considering the quantum of retail floorspace, the mix and type of retail and service provision, the attraction of centres and their support population. This work has informed our analysis of shopping hierarchy. In reaching the conclusions on the appropriate designation for centres we have also taken into account the household shopping survey market share information and our health check assessments. The hierarchy has been prepared in the context of the NPPF requirement to define a network and hierarchy of centres which is resilient to anticipated future economic changes. The NPPF provides in Annex 2 a glossary which in considering town centres advises the term applies to city, town, district and local centres. The Glossary definition also indicates that small parades of shops of neighbourhood level significance should not be considered to constitute town centres.

8.6 The proposed hierarchy set out below provides consistency with national planning policy, and rather than use an additional lower local tier to define village centres, we have included the large village centres in Lewes District within the Local Centre classification in order that national policy protection can be afforded to these smaller but important village centres.

TABLE 8.1: Lewes District Retail Hierarchy
Main Town Centre • Lewes • Seaford
District Centre • Peacehaven Meridian • *Newhaven (re-structured)*
Local Centre • Newhaven (as existing) • Peacehaven South Coast Road/Telscombe Cliffs • Ringmer • Ditchling • Newick

8.7 Lewes town centre is the District's main shopping location and is the administrative focus for the District benefitting from a range of retail service, employment, leisure and civic uses. It is therefore appropriate given its overall scale and function that it is defined as a Town centre in the local retail hierarchy.

8.8 Seaford, with its large supermarket anchor and mix of other retail and retail services and other town centre uses is relatively 'self-sufficient' in shopping terms and fits within the typology of either a town or district centre**.** On balance, given the scale of the town centre and the size of Seaford's support population, which is larger than that of Lewes, it is our view that Seaford should be classified as a Town centre in the local retail hierarchy.

8.9 Peacehaven, comprising of both the Meridian Centre and South Coast Road are smaller centres which have more limited functions. We consider that, whilst the two shopping locations at Peacehaven are to an extent complementary, they are distinct and separate and should be regarded thus in the local retail hierarchy. The Meridian Centre is primarily focused upon retailing whereas the South Coast Road has less retail function and wider range of retail services uses such as banks, estate agents, cafes, hair and beauty salons etc. We therefore consider that The Meridian Centre, Peacehaven should be classified as a District Centre and South Coast Road identified in the hierarchy as a Local Centre.

8.10 Newhaven town centre as existing has a very limited shopping role; the main focus for retailing is to the east of and outside the town centre at the Drove Retail Park and Sainsbury superstore. Whilst these out of centre retail facilities attract substantial customer numbers they do not fulfil the role of a town centre as they lack the requisite service, leisure and civic uses. We would place Newhaven (as existing) as Local Centre as it currently lacks a quantum of retailing and retail services to merit a higher classification.

8.11 This study's findings in respect of the need for additional retail floorspace in Newhaven, together with the Council's apparent strategic objective to regenerate and reinvigorate the town centre area through encouraging a mix of appropriate town centre uses including retail service, leisure, commercial, office, residential, tourism, cultural and community uses should in time see the centre re-classified as a District centre.

8.12 Whilst this Study has not focused particularly upon the smaller rural centres within the District; we have in preparing the Study visited these centres and assessed their level of shopping provision. We also have the results of the household survey which show that facilities in the larger settlements of Ringmer and Newick have a not insignificant top-up shopping function for their immediate catchment populations. These smaller centres do have a retail focus and a range of shops and service uses which lead us to conclude that they should be included within the shopping hierarchy of the District. There are smaller rural settlements such as Barcombe, Firle, Glynde, Chailey, Wivelsfield Green and Plumpton Green which have single village store type shops which are clearly vital to the local population, but these locations are in our view too small to warrant classification within the shopping hierarchy.

8.13 The shopping hierarchy suggested is similar to that recommended in the 2005 Study, except that the local centre classification now includes the larger village centres.

8.14 The establishment of a shopping hierarchy enables the setting of thresholds in terms of the scale of development appropriate to specific categories of centre and the level of development beyond which criteria based policies are triggered to ensure proposals are tested to establish whether or not they would have damaging impacts.

Policy Recommendations

8.15 At a national level, town centre and retail policy has shifted from a detailed framework of criteria based policy and tests to be considered and 'passed' to a less prescriptive and more strategic approach.

8.16 The NPPF confirms the relevance of the sequential approach and consideration of impacts but does not provide any substantive details of how these considerations should be applied or operated. As a consequence the setting of local policy to control and shape developments in the context of local needs and issues is especially important.

8.17 We would emphasise that our work has demonstrated that there is no pressing quantitative need for the Council to be allocating specific sites for significant retail development in the next five to 10 years and beyond. The level of quantitative shopping capacity identified can largely be absorbed by more intensive trading within the existing retail facilities.

8.18 However, our analysis has shown that there are a number of qualitative arguments that could be pursued to support additional provision in the future and it is possible that there will be further future commercial demand for new retail floorspace, most likely in the form of new foodstores.

8.19 To control potential future retail development coming forward and ensure that any such development is rigorously reviewed and tested, we would recommend that retail policy in the Core Strategy DPD incorporates criterion based policies broadly reflecting the previous key tests for retail development which were set out in the now-revoked PPS4. This will allow the Council to consistently review and ultimately test the appropriateness of any such proposals over the plan period and to provide a mechanism to control inappropriate retail development which might impact upon the vitality and viability of the District's existing centres.

8.20 We therefore suggest that the detailed considerations under the sequential approach and impact be set out at the local level within the Core Strategy DPD. Furthermore, this also allows the opportunity to set criteria which have specific regard to any locally important and relevant retail and town centre issues in Lewes's town centres. For example, given the local distinctiveness and diversity of local independent trades, impact upon these could be a specific consideration.

8.21 Fundamental to the operation of these tests is the clear definition of primary shopping areas within each of the designated town centres in the hierarchy. **Appendix 7** provides our recommendations for the extent of the primary shopping areas within Lewes, Newhaven, Seaford and Peacehaven town centre.

8.22 The town centre-first approach continues to be a national policy aim and commitment to town centres requires the application of the sequential approach. The need to apply the sequential approach to site selection, in terms of assessing the the suitability, viability and availability of alternative sites, should be stated in the Core Strategy DPD. This should also include reference to the requirement for a demonstration of flexibility by applicants/operators in terms of operational and business model application to sequential site analysis.

8.23 A retail impact policy should also be included in the Core Strategy DPD. The NPPF advises at paragraph 26 that local planning authorities should require impact assessments from applicants proposing retail and other town centre uses which are outside the town centre and not in accordance with an up-to-date local plan. The default scale of development above which an impact assessment is required is 2,500 sqm (gross). It is suggested such impact assessments should include assessment of:

- 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;

- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes, where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.

8.24 The NPPF is not however prescriptive and provides the opportunity to take into account local impact considerations where appropriate; this can include setting alternative local thresholds for the scale of impact assessments for edge-of-centre or out-of-centre development, independent of the default 2,500 sqm (gross). This might for example include a demonstration that the proposals would not adversely impact the existing diversity of the town centre or local independent traders.

8.25 Given that our work has not found a substantial unmet need for retail development, it follows that any further retail development which may come forward over the plan period rather than be supported by retail turnover capacity would in theory be diverting trade from existing retail locations. Therefore, as retail capacity analysis is an important component of a turnover/trading impact assessment, a requirement to provide an updated review of retail capacity for non-central retail developments should be included as a criterion in the retail impact policy.

8.26 Given the relatively modest existing scale of the centres within Lewes District, it is considered that a development smaller than the default NPPF impact assessment threshold of 2,500 sqm (gross) could have a potentially substantial effect on the role and function of the existing centres. We therefore suggest that it may be more sensible to adopt locally set threshold to trigger a criterion based impact policy for determining unplanned future retail proposals would apply. The thresholds we would recommend are applied to edge- and out-of-centre proposals are set out in the table below.

TABLE 8.2 Floorspace Thresholds To Trigger Impact Assessment
Main Town Centre – 750 sqm gross
District Centres – 500 sqm gross
Local Service Centre – 250 sqm gross

8.27 The supporting text to the shopping and town centres policy should also highlight that this Study, whilst providing a robust basis for strategic policy formulation over a longer time period to 2030, will require periodic updating in respect data inputs such as population change, local spending estimates, expenditure growth rates, quantum of shopping floorspace, trading densities and shopping patterns. Whilst some of these data inputs such as spending estimates are regularly updated, shopping patterns can only be reconsidered by way of a new bespoke household survey. Subject to the level of change in retail provision both within the District and in competing centres beyond which will alter shopping patterns we would recommend that retail changes are monitored and a view taken as to when a new survey should be undertaken (typically five years) but much will depend upon local circumstances.

8.28 With regard to local shopping facilities in the smaller villages, local parades and farm shops, we consider generally these provide a valuable local shopping and social function and the Council should seek to retain and enhance existing facilities. Proposals for new small scale rural facilities should be encourage where they provide for local needs as they provide a valuable social and economic contribution.

9. CONCLUSIONS AND RECOMMENDATIONS

9.1 This Shopping and Town Centres Study for Lewes District has considered the quantitative and qualitative needs of the District's main town centres utilising up to date data on shopping patterns, existing and forecast population, local estimates of expenditure growth and current retailer trading densities and trading performance analysis.

9.2 The output requirements of the brief have been addressed within the preceding sections of this report and by the analysis provided within the technical appendices, particularly the Household Shopper Survey results at Appendix 2, the centre health checks at Appendix 3 and the retail capacity analysis at Appendix 5.

9.3 The study has found the following in terms of retail floorspace need:

9.4 **Lewes Town Centre** – performs well in terms of its tourist and day visitor role but has limited everyday comparison goods shopping. The capacity analysis shows no significant quantitative retail need but there is felt to be an element of qualitative need to address existing gaps in comparison goods retailing provision and to seek to claw back some leaking trade.

9.5 **Newhaven Town Centre** – the town centre performs very poorly and has been in decline over a number of years. There is a quantitative need for additional convenience and comparison goods floorspace although the extension to the Sainsbury store will absorb a large portion of this, to the extent that there is insufficient capacity to support either of the current foodstore based retail proposals to the east of the town centre. Qualitatively there is some need arising from the clearly evidenced (food based) overtrading at the Sainsbury store and the need to regenerate the Town Centre. Newhaven occupies a strategically and geographically important central location between Seaford and Peacehaven along the coastal part of Lewes District and this location makes it in our view an appropriate location to meet the combined needs for Newhaven, Seaford and Peacehaven.

9.6 **Seaford Town Centre** – the town centre performs well and has a good range and mix of retail, retail services and other town centre provision. Our capacity analysis has shown a need for both convenience and comparison goods shopping floorspace; however, qualitatively this theoretical need can be absorbed by the existing retail floorspace performing more efficiently and profitably.

9.7 **Peacehaven Town Centres** - Comprises of two separate and distinct shopping areas, and has limited scope or need for additional retail floorspace. The Meridian Centre is the main retail focus and South Coast Road is a smaller local shopping location serving a lesser retail function.

9.8 In recommending retail and town centre policies for the District; having regard to the changing policy position and in particular the streamlining of national policy with the publication of the NPPF, we consider it important to safeguard the continuing vitality and viability of centres within the District. We have outlined a suggested hierarchy of centres which will assist with the local application of policy tests to ensure that the scale of proposals which come forward are tested commensurate with the hierarchy of centres.

9.9 The sequential test should be used to ensure developments are directed to central sites and criteria based impact test should be adopted which ensures that any proposals of a certain scale relative to the centre hierarchy are fully and robustly tested.

9.10 Our analysis has not found any overriding need for the Council to specifically seek to allocate sites within or on the edge of existing centres.

APPENDIX 1

Working in Partnership

LEWES DISTRICT SHOPPING AND TOWN CENTRES STUDY

Invitation to Quote – Quotation Brief

1 Introduction

1.1 Lewes District Council (the Council) is currently preparing a Local Development Framework (LDF), primarily focusing on progressing the Core Strategy towards adoption. To date, the Council has undertaken an Issues and Emerging Options consultation (under Regulation 25 of the Town and Country Planning (Local Development) (England) (Amendment) Regulations) and compiled a number of key pieces of evidence. An Emerging Strategy document (also as part of Regulation 25) was published for consultation on 30 September 2011 for six weeks and Regulation 27 will be reached in early 2012. The plan period for the Core Strategy is 2010 to 2030.

1.2 Approximately 56% of the area of Lewes District lies within South Downs National Park. On 1 April 2011 South Downs National Park Authority (SDNPA) became the sole planning authority for the national park area. The Council and SDNPA are working in partnership to prepare a Core Strategy that covers the whole of Lewes District, including the area within the national park. This Core Strategy is due to be adopted in early 2013. In due course SDNPA will also prepare its own Core Strategy for the whole park.

1.3 The main purpose of the Lewes District Shopping and Town Centres Study (STCS) will be to inform policy development on planning for shopping and town centres in the District for the emerging Lewes District Core Strategy and other Development Plan Documents and to provide a sound and robust evidence base upon which to assess planning applications for shopping development. The Council has previously carried out or commissioned a number of related studies, including the Lewes Retail Study (GVA Grimley, 2005), which are now somewhat out-of-date. The Council and SDNPA now require a comprehensive review and update of our shopping and town centres/leisure evidence.

1.4 This brief is to be used to enable suitably experienced Consultants to quote for the work set out in this document. It outlines the context for the study, the work required, the timescale envisaged and the procedure for the submission of quotes.

1.5 Although the Lewes District Core Strategy is being prepared jointly with between SDNPA and the Council, the procurement of a Consultant to undertake the STCS is being undertaken by the Council and in accordance with its procurement procedures.

1.6 However, officers from SDNPA have contributed to the content of this Invitation to Quote and will be involved in the selection process for appointing a Consultant to undertake the study. In addition, the interim findings and the draft report will be considered by officers from both authorities. The final report will be owned by both the Council and SDNPA and therefore both authorities should be considered as the client, although all enquiries and billing should be directed to the Council.

1.7 The study area will be the whole of the Lewes District although the emphasis of the work will be on the main town centres. Sub-divisions of the study area should have a logical relationship to the catchment areas of the individual town centres. In addition it will be necessary to look at issues outside the district boundary to take account of the shopping centres and out-of-centre provision in Brighton and Hove, Tunbridge Wells, Eastbourne, Crawley, Haywards Heath, Burgess Hill and Uckfield, where this is seen to be relevant.

2 Background

Context

2.1 Lewes District is a largely rural and coastal authority covering 29,224 hectares in the central part of the Sussex coast. Its 2011 population is estimated to be 96,090, declining to 95,750 by 2021 & recovering to about 96,180 by 2030 (from ESiF database).

2.2 These population figures relate to the planned construction of about 4,150 new homes between 2010 & 2030. The new housing will merely off-set the expected decline in average household size within the existing housing stock – hence an almost static population to 2030 is expected.

2.3 Lewes town is the administrative centre of the district having a population of 15,590 (2001 Census). The district's largest town is Seaford (population 21,840 (2001 Census)) whilst the district also includes the cross-channel port of Newhaven (population 12,280 (2001 Census)) and the coastal residential area of Peacehaven/Telscombe (population 17,540 (2001 Census)) which has close economic links to the city of Brighton and Hove.

2.4 Newhaven has year-round ferry links with Dieppe in Normandy. Lewes Town is entirely within the National Park whilst the park boundary closely abuts the coastal towns of Seaford, Newhaven and Peacehaven/Telscombe.

2.5 Newhaven has a significant concentration of retail warehouses and a large out-of-centre superstore. The district as a whole is heavily influenced by the regional shopping centre of Brighton and Hove to the west and the sub-regional shopping centre of Eastbourne to the east.

Relevant Studies

2.6 The Council previously commissioned GVA Grimley to undertake the Lewes Retail Study, which was completed in March 2005. That study highlighted a range of policy recommendations to guide retail and leisure planning in the District to provide a technical basis for the preparation of the LDF.

2.7 The 2005 Lewes Retail Study made a number of policy recommendations:

2.8 Lewes town:
The town should be promoted as the main focus for retail and leisure activity in the District. While not much expansion in its current role was anticipated, in order to maintain its current position in the hierarchy it was considered that mainstream shopping needs must be met (including an improved main food anchor and the provision of modern units to meet retailer requirements). The aim should also be to reinforce the distinctive character and enhance the eclectic mix of specialist/niche retailer and service providers and enhance Lewes town's role as the District's principle leisure, cultural and visitor destination. The study also highlighted lack of parking as an issue, especially as Lewes is a visitor destination, and that Lewes town should be promoted to visitors.

2.9 Newhaven:
Newhaven was found to primarily serve a local convenience shopping and services function. It struggled to attract expenditure from outside the town and in retail terms this was not predicted to improve. The town centre was suggested for reclassification (downgrading) to a District Centre and reinforced for serving a local function, while opportunities should be taken to enhance the town's wider appeal to visitors, including opportunities for a vibrant waterfront. Residential accommodation in the centre was to be encouraged to help the vitality and viability.

2.10 Peacehaven:
The Meridian Centre and South Coast Road should continue to be defined as two separate areas but neither area was considered to function as a town centre, although the Meridian Centre had the

characteristics of a PPS6 (now revoked) District Centre. The Meridian Centre and immediate area was considered to be a development opportunity. South Coast Road was not found to provide a significant service for local residents, mainly for passers-by along the A259.

2.11 Seaford:
Seaford was found to be serving its local catchment despite competition from Eastbourne and that the provision of goods and services was relatively self-sufficient. The LDF should seek to reinforce its town centre role. Retail uses should be directed to the primary shopping area, while more diverse uses should be encouraged in the peripheral areas to help the vitality beyond the central area. Development options within Seaford were recognised as extremely limited so emphasis on filling vacancies and extensions to existing town centre shops were recommended. Enhancements to the anchor supermarket were to be encouraged (now Morrisons). It was also considered that Seaford's potential as a visitor attraction should be more fully exploited.

2.12 Local Shops

Demand for local shops was expected to decline but it was advised that policy should seek to retain local shops where possible, unless they cannot be made viable. Local parades should also be supported to remain as vibrant focuses for local communities. Where it is not possible to retain local shops, policy should include sufficient flexibility to allow each proposal to be considered on its merits.

2.13 Prior to the 2005 Retail Study Audits of existing uses within and around the town centres of the Lewes District were carried out by the local authority in the Spring of 2004, which gave a snapshot of town centre uses, quantity of shopping (including non-retail (service trade) shops), vacancy rates, out of town retailing and retail availability in the rural areas.

2.9 A Retail Strategy for Town Centre Development and Growth for Newhaven was carried out by consultants DTZ in June 2004. The study provided a retail strategy for town centre development and growth for Newhaven. The study made general recommendations of site specific issues relevant to Newhaven. At this time the most relevant conclusion was that there was some capacity for comparison goods in Newhaven town centre however DTZ forecasted that there was negligible capacity for convenience goods floorspace in Newhaven town centre over the period 2004 – 2016.

2.10 The Lewes District Economic Strategy (2006) set out the District's priorities for future economic development based around a number of elements including delivering vibrant town centres.

2.11 In 2008, BBP Regeneration was commissioned by Newhaven Strategic Network (NSN) to produce a 20-year Physical Development Vision for Newhaven, which was published in April 2010. Whilst the study looked at the wider vision for Newhaven and ways of achieving that vision, it also looked specifically at the town centre and noted that more attractive locations are needed for retail development. (NSN comprised of a range of partners including SEEDA, East Sussex County Council, Lewes District Council, Newhaven Town Council and Newhaven Community Development Association).

2.12 In September 2010 consultants Nathaniel Lichfield and Partners carried out an Employment and Economic Land Assessment (EELA), to inform the Local Development Framework Core Strategy. It focused on the employment space needs for the group of B uses but also looked in broad terms at the employment potential of non B class use, such as retail use.

2.13 The EELA identified that most new retail floorspace is likely to be accommodated primarily within or adjoining the main centres, but that it was possible that some retail warehousing and convenience superstores may seek to locate on existing industrial land. It also noted that the retail sector has a below average concentration within the District and has achieved limited job growth in recent years.

2.14 Simple audits of town centre vacancy rates and shopping structure were undertaken in 2009 and 2010 (including the village of Ringmer in 2010). These were undertaken as an interim measure to help understand the impact of the economic recession on shopping (including non-retail (service trade) shops) and town centre uses in the District.

Planning Policy

2.15 The Government proposes to replace the current planning policy statements which cover a wide range of topics, with a National Planning Policy Framework to make the planning system less complex, more accessible, and to promote sustainable growth.

2.16 The Draft National Planning Policy Framework has been published for consultation and includes a section on 'planning for prosperity'. This sets out the government objectives of promoting the vitality and viability of town centres, and meeting the needs of consumers for high quality and accessible retail services. The content of paragraph 30 of the draft NPPF is of particular relevance to the study that the Council is seeking to commission. At present the national Planning Policy Statements (PPSs), Planning Policy Guidance notes (PPGs) and circulars are still in force and national policy of particular relevance to the proposed retail study is as follows:

2.17 Planning Policy Statement 1: Delivering Sustainable Development (PPS1) states that the government is committed to promoting a strong stable and productive economy that aims to bring jobs and prosperity for all. In particular paragraph 23 (iii) states that planning authorities should, "Ensure that suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure developments, so that the economy can prosper".

2.18 PPS1 also states that in preparing development plans in order to deliver sustainable development, planning authorities should "bring forward sufficient land of a suitable quality in appropriate locations to meet the expected needs for amongst other things retail and commercial development".

2.19 Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) sets out government objectives for prosperous economies, which includes main town centre uses.

2.20 PPS4 requires that evidence should be used to plan positively and paragraphs EC1.3 and EC1.4 set out what the evidence base should comprise of and have regard to.

2.21 PPS4 states that local planning authorities should take account of both quantitative and qualitative need for additional floorspace for different types of retail developments and that in deprived areas, which lack access to a range of services and facilities, give additional weight to meeting those qualitative deficiencies.

2.22 In respect of qualitative need, PPS4 requires that an assessment of genuine choice is made to meet the needs of the whole community. It requires that the degree to which shops may be overtrading be taken into account and whether there is a need to increase competition and retail mix.

2.23 PPS4 also states that when assessing quantitative need, regard needs to be given to relevant market information and economic data, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of good to be sold and forecast improvements in retail sales density.

2.24 The South East Plan (SEP) is the Regional Spatial Strategy for the South East. It was revoked by the Secretary of State for Communities and Local Government on 6 July 2010. However, that revocation has been subject to a successful legal challenge and the revocation quashed. The intention to abolish the SEP remains and the Government is pursuing its abolition through the Localism Bill. In the meantime the SEP continues to constitute part of the development plan.

2.25 The SEP chapter on town centres stresses that the development of dynamic and successful town centres is central to the achievement of sustainable development in the South East. In particular local centres are likely to be a focal point for some but not necessarily all development and should develop their distinctive features and nature.

Policy TC1 sets out a ***Strategic Network of Town Centres*** in the region into which the 'town centre uses' as set out in PPS6 (since revoked, town centres currently covered in PPS4) were to be focused – none of the urban areas in Lewes District are included in this network of towns. However, the pretext does note the need to distribute some growth to middle and lower order centres to avoid the over-dominance of the largest centres (no quantum is specified). Therefore, local centres will be a focal point for some development to develop their distinctive features and nature.

Policy TC2: ***New Development and Redevelopment in Town Centres***, states that local authorities should assess the need for further floorspace in town centres and set out a vision and strategy for the network and hierarchy of centres within their area.

Policy TC3: ***Out of Centre Regional/Sub-Regional Shopping Centres*** No need was identified for any such additional shopping centres or extensions to existing ones.

Policy BE4: ***The role of Small Rural Towns (Market Towns)*** identifies that local planning authorities should encourage and initiate schemes and proposals that help strengthen the viability of small rural towns. They set out a number of criteria that local development documents should address to support economic activity within such towns.

3 Specification of the Assessment

3.1 The Council and SDNPA seek to commission a Consultant to undertake a robust Shopping and Town Centres Study of the District. The primary purpose of this study is to:

a) Fully understand how the local shopping market operates in order to assess each centre's expected economic growth, or decline;
b) Assess the overall need for new floorspace for comparison, convenience and service trade shopping uses in each town centre, taking account of qualitative and quantitative factors commensurate with the promotion of the vitality and viability of the town centre. Also to identify any need for new bulky goods floorspace;
c) Identify deficiencies or gaps in the provision in each town and assess the capacity of existing centres to accommodate new development, including the need for extending the town centres and to identify centres which may need consolidation;

d) Analyse the various shopping sectors (including national multiples and independent shops) to provide information on the shopping mix that is required in any new development;
e) Identify potential sites to accommodate any needs arising, in the context of the sequential test, environmental constraints and the need for sites to be commercially viable and deliverable when required. This would include any out-of-centre sites where there are inadequate opportunities in or on the edge of an existing town centre.
f) Assess the accessibility of the town centres by transport modes other than the private car and any present or future economic implications;
g) Assess the accessibility of the town centres by private car, including car parking and any future economic implications;
h) Assess where deficiencies exist in the provision of local convenience shopping (i.e local shops and village shops) and other facilities which serve the day to day needs;
i) Identify the shopping hierarchy of the District;
j) Provide baseline statistics for the annual monitoring of shopping floorspace and to provide information for use in subsequent monitoring reports; and
k) Review and assess the policy recommendations in the 2005 Lewes Retail Study, with regard to changes in economic policy and circumstances since that time, and provide updated policy recommendations for the period 2011 to 2030 or provide justification if it is appropriate for the policy recommendations to remain the same.

3.2 The Study must be suitable to be included as robust evidence for town centre and shopping policies that may be set out in the Core Strategy.

3.3 The final output of the Study should be clear policy recommendations for the future requirements of shopping and town centres in Lewes District to 2030.

3.4 Outputs from the study should be able to be mapped onto geographical information systems. Datasets must, therefore, be in a format compatible with the Council’s IT systems. Datasets and mapping will be the property of the Council and SDNPA and must be provided in a form which can be updated and maintained in the future.

4 Methodology and Assumptions

4.1 The Consultant should set out a methodology which will need to be fully explained and justified and which should be based on current best practice. The proposed methodology should be clearly set out in the Quotation submission.

4.2 The PPS4 Practice Guidance on Need, Impact and the Sequential Approach at Appendix B (Figure B1) presents a five stage methodology for undertaking quantitative need assessment. The five stages of the Practice Guide methodology are:

- Step 1: Define Assessment Area / Catchment and determine assessment time frame
- Step 2: Analyse consumer expenditure
- Step 3: Assess existing retail supply and market shares
- Step 4: Compare existing retail supply with demand
- Step 5: Assess future capacity

Step 1: Define Assessment Area / Catchment and determine assessment time frame

4.3 The PPS4 Practice Guide (para B5) advises that study areas need to be carefully defined in the context of the objectives and the type of assessment. Where assessments are to inform the preparation of development plans (as in this case), it is important that the area is drawn sufficiently widely to thoroughly examine the relationship between centres and their catchments, including any neighbouring centres and areas where these have relationships with the planning authority area.

Step 2: Analyse Consumer Expenditure

4.4 Paragraph B.16 of the Practice Guide advises that population and expenditure estimates need to be derived for each sub-area within the area covered by the assessment in order to establish the existing consumer demand at the base year, and will enable projections to be made for each sub-area to the forecast year or design year as appropriate. In the case of local area assessments it may be relevant to factor in local population changes - for example major planned housing developments. This is relevant in Lewes Districts' case in view of potential sites and locally derived housing target identified in the Emerging Core Strategy document.

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Step 3: Assess Existing Retail Supply and Market Shares

4.5 Having established the level of available expenditure the practice guide advises (B. 29) it is necessary to determine the existing level of retail supply and the distribution of market shares. The guidance advises it is important that all retail floorspace is included in such assessments.

Step 4: Compare Existing Retail Supply with Demand

4.6 Paragraph B. 36 advises that having identified existing expenditure and market shares it is necessary to identify the relative turnover / performance of each centre and establish how the forecast population and goods-based expenditure growth is likely to be distributed within identified sub-areas.

4.7 The practice guide goes on to advise (B.37) that the household survey will determine the levels of available shopping expenditure retained by individual centres and the plan area as a whole and (B. 39) whether this represents a reasonable baseline for forecasting purposes i.e. are existing facilities trading broadly in line with 'acceptable' levels or is there evidence that facilities are underperforming or 'overtrading'. For the purposes of this Study the household survey should use a suitably stratified 1% sample of households (i.e about 430-440 households).

Step 5: Assess Future Capacity

4.8 The practice guide advises (B.45) that assuming existing centres / stores are trading in line with appropriate benchmark levels at the established base year, a comparison between current and forecast turnover levels will give an indication of expenditure 'surplus' or capacity likely to be available within the assessment area by the end of the forecast period i.e. based upon expenditure growth alone.

4.9 Appendix D of the practice guide sets out 5 stages of analysis that is conventionally undertaken when examining quantitative need.

4.10 It is essential that the methodology used is consistent with current best practice in its entirety, seeks to deliver the primary purposes of the study and is robust enough to withstand rigorous scrutiny under independent examination.

4.11 It is anticipated that the consultants would develop the study in consultation with the shopping sector, town and parish councils and community led groups such as the Newhaven Strategic Network and the methodology should set out any stakeholder engagement to be undertaken to inform the Study.

4.12 Within the quotation submission the Consultant should specify whether they would be willing to attend future Planning Inquiries or an Examination in Public on behalf of the Council and/or SDNPA to defend the findings of the completed study (subject to separate fee negotiation). The submission should also state if the Consultant would be willing to brief District Councillors and National Park Authority Members on the findings of the Study and whether an additional cost would be incurred for this.

5 Timescales, Outputs and Project Management

5.1 The following timescales will apply unless otherwise agreed:

ACTION	DATE / TIME
Submission of Quotes	Monday 24 October 2011 by 5pm
Interviews (if required)	Tuesday 2 November 2011
Inception Meeting	Wednesday 9 November 2011
Initial Findings Feedback/Review	Wednesday 14 December 2011
Draft Report	Wednesday 15 February 2012
Final Report	Monday 27 February 2012

5.2 The Council's main point of contact for the Study is Susie Mullins (susie.mullins@lewes.gov.uk 01273 484418 Planning Services, Southover House, Southover Road, Lewes, BN7 1AB). Regular informal contact is considered essential to the success of the Study. To this end, an email summary of progress will be expected from the Consultant at least fortnightly.

5.3 Two hardcopies of the final written Study with an Executive Summary are required to be submitted along with an amendable electronic copy in a format that is compatible with the Council's IT systems (currently Microsoft 2003) and suitable for direct publishing on the Council's website.

5.4 The Study must be able to inform the LDF requirements for shopping and town centre policies as a reliable, robust and justified core document for the LDF evidence base, meeting the requirements of relevant national guidance and best practice. It must, as a minimum, meet the content and scope of this brief and the agreed methodology.

5.5 The report must be clearly written in plain English so that it may be understood by Council officers, members, auditors, inspectors and the public. The format must be clearly presented in a logical order with contents page, page and paragraph numbers, glossary etc as required to provide a clear and usable document.

5.6 Sources of data, information and modelling/forecasting/scenario testing techniques must be documented and the reliability/authenticity of these must be explained and verified.

5.7 Assessment methods used must be documented, including technical descriptions of any models/forecasting/scenario testing methods used and their application. Where checklists, flowcharts, maps etc are used these should be included in an appendix, clearly identified and clearly linked to the relevant text in the main report.

5.8 Outputs from the report should be able to be mapped onto geographical information systems. Datasets must, therefore, be in a format compatible with the Council's and SDNPA's IT systems. Datasets and mapping will be the property of the Council and SDNPA and must be provided in a form which can be updated and maintained in the future.

5.8 Assumptions and uncertainties in data, assessment methods and results must be clearly identified, and the precautionary approach adopted to manage such uncertainties must be clearly explained.

5.9 The inception meeting, interim findings, draft report and final reports are to take place in accordance with the agreed project timetable.

6 Terms and Conditions

6.1 Planning Inquiries and Examinations

The appointed consultancy may be required to attend future Planning Inquiries or Examinations in Public to substantiate the findings and recommendations of the Study. Costs relating to this would be subject to separate negotiations as and when the need arises.

6.2 Environmental Policy

The Consultant is required to read and comply with the Lewes District Council Environmental Policy (Appendix 1) and the issues outlined within it.

6.3 Draft Agreement

A draft Agreement for the Study is attached with this quotation pack.

7 Instructions for Submitting a Quotation

7.1 Quotations to be submitted by e-mail to Susie Mullins, Planning Officer, Lewes District Council (susie.mullins@lewes.gov.uk) **by the 5pm on Monday 24 October 2011**. Any quotation received after the closing date and time will not be considered.

7.2 The price quoted for the Study will be for the total cost for the work (including any disbursements incurred), excluding VAT.

7.3 Submissions should also include/demonstrate:

i. The proposed methodology, demonstrating a clear appreciation of the brief;
ii. The Consultant's suitability for the work in terms of expertise, qualifications and relevant recent experience;
iii. The Consultant's resource availability to undertake the Study in accordance with the required timetable;
iv. CVs of all staff to be assigned to the work, including daily or hourly rates for each and the hours each person will be allocated to carry out the work. Such staff shall not be substituted without the prior agreement of the Council;

v. Contact details of two previous clients willing to provide references on recent similar work;

vi. Confirmation that in undertaking the Study there would be no conflict of interest with any existing or anticipated commissions;

vii. Copies of certificate(s) from insurers or brokers confirming the existence, the cover, Indemnity Limits and anniversary dates of the Consultant's general liability (employers and public liability) and continuous Professional Indemnity Insurance covers. Original copies must be supplied by the winning consultancy as soon as the Agreement is awarded.

7.4 The formal engagement of the chosen Consultant shall follow the agreement of a methodology that adequately describes the scope of the service to be provided and shall be subject to completion of a contract of appointment approved by the Council's Corporate Head - Legal and Democratic Services.

7.5 The Council is under no obligation to accept any quotation. If no suitable quotations are received the Council will restart the process and seek new quotations. The Council does not bind itself to accept the lowest, or any other, quotation. The Agreement will be awarded to the Consultant submitting the most cost effective offer defined by reference to:

- Financial bid and consequential costs;
- Quality, and technical soundness, of the proposal;
- Experience of the practice, and nominated staff;
- Ability to deliver within given timescales.

7.6 The Council shall not be liable to reimburse any costs related to the preparation or submission of a quotation.

8 Background documents

Emerging Core Strategy draft consultation document
http://cmispublic.lewes.gov.uk/Public/Meeting.aspx?meetingID=413

Core Strategy Issues and Emerging Topic Papers (2010)
http://www.lewes.gov.uk/corestrategy/index.asp

Draft National Planning Policy Framework

PPS4: Planning for Sustainable Economic Growth Companion Guide: Delivering Affordable Housing

PPS12: Local Spatial Planning

The South East Plan

Lewes District Local Plan

www.lewes.gov.uk/planning/localplan.asp

Retail Strategy for Town Centre Development and Growth in Newhaven (DTZ, 2004)

Physical Development Vision for Newhaven (BBP Regeneration, 2010)

Lewes District Employment and Economic Land Assessment (Nathaniel Lichfield and Partners, 2010)

Appendix 1

Lewes District Council Environmental Policy 2008

We play a role in helping people improve the quality of life in their community. As part of this we aim to continually improve our environmental performance. By taking action locally we will play our part with others in helping to improve the global environment and adapting to climate change.
We have adopted the following set of principles to guide what we do.
We will consider and use best practice and technology as resources allow.
In carrying out our operations we will keep within environmental laws and work to them as a minimum standard.

THE PRINCIPLES

POLLUTION PREVENTION & CONTROL
We will:
PPC 1 Monitor and work to minimise air, land and water pollution using available resources and legislation.
PPC 2 Minimise the pollution resulting from all Council and Contractor operations.

ENERGY & WATER
We will:
EW 1 Implement actions to reduce the Carbon Footprint of Council operations.
EW 2 Reduce the Councils consumption of water, gas and electricity.

TRANSPORT
We will:
TR 1 Encourage and support a mixed transport strategy with particular emphasis on reducing car use and promoting alternative modes of travel.
TR 2 Monitor our own fleet and work to increase fuel efficiency, reduce associated pollutants and investigate new technology.

BIODIVERSITY
We will:
BIO 1 Avoid, minimise and mitigate any negative impacts on biodiversity and ecological resources arising through the work of the Council or its Contractors.
BIO 2 Protect, enhance and promote wildlife habitats, environmentally sensitive areas and green spaces within the District.

PROCUREMENT
We will:
PRO 1 Maximise and influence the environmental performance of Council contractors through the contract process.
PRO 2 Develop, maintain and work to the ‘Sustainable Procurement Policy’.

WASTE & RECYCLING
We will:
WR 1 Encourage & help staff to reduce the amount of waste produced by offices.
WR 2 Encourage and help Council contractors to Reduce, Re-use and subsequently Re-cycle goods and materials.

SUSTAINABLE DEVELOPMENT
We will:
SD 1 Consider the social, environmental and economic impacts of the work that we do.
SD 2 Determine the Ecological Footprint of the District and work to reduce it.
SD 3 Promote and encourage environmentally, economically and socially sustainable development within the District.

APPENDIX 2

Q1. Which store do you usually use for your MAIN food and grocery items?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	115	32	42	70	187	95	126	64	73
Aldi, London Road, Brighton	0.25%	0%	0%	0%	0%	0%	0%	0%	3.12%	0%
	2	0	0	0	0	0	0	0	2	0
Aldi, Lewes	1.12%	3.48%	6.25%	2.38%	2.86%	0%	0%	0%	0%	0%
	9	4	2	1	2	0	0	0	0	0
Aldi, Portslade	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
	1	0	0	0	0	0	0	0	0	1
Asda, Brighton Marina	9.83%	0%	0%	0%	0%	0.53%	5.26%	35.71%	43.75%	0%
	79	0	0	0	0	1	5	45	28	0
Asda, Hollingbury, Brighton	1.24%	4.35%	3.12%	0%	0%	0%	1.05%	0.79%	0%	2.74%
	10	5	1	0	0	0	1	1	0	2
Asda, The Crumbles, Eastbourne	0.25%	0%	0%	0%	0%	1.07%	0%	0%	0%	0%
	2	0	0	0	0	2	0	0	0	0
Budgens, Hassocks	1%	0%	0%	0%	0%	0%	0%	0%	0%	10.96%
	8	0	0	0	0	0	0	0	0	8
Co-Op, Broad Street, Seaford	0.62%	0%	0%	0%	0%	2.67%	0%	0%	0%	0%
	5	0	0	0	0	5	0	0	0	0
Co-Op, Heathfield	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Co-Op, Longridge Avenue, Saltdean	0.25%	0%	0%	0%	0%	0%	0%	0%	3.12%	0%
	2	0	0	0	0	0	0	0	2	0
Co-Op, Lustrells Vale, Saltdean	0.25%	0%	0%	0%	0%	0%	0%	0%	3.12%	0%
	2	0	0	0	0	0	0	0	2	0
Co-Op, Meridian Centre, Peacehaven	3.36%	0%	0%	0%	0%	0%	0%	21.43%	0%	0%
	27	0	0	0	0	0	0	27	0	0
Co-Op, Newhaven	1.87%	0%	3.12%	0%	0%	0%	13.68%	0.79%	0%	0%
	15	0	1	0	0	0	13	1	0	0
Iceland, Haywards Heath	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
	1	0	0	1	0	0	0	0	0	0
Iceland, Langney Shopping Centre, Eastbourne	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Lidl, Newhaven	1.24%	0%	3.12%	0%	0%	1.60%	2.11%	2.38%	1.56%	0%
	10	0	1	0	0	3	2	3	1	0
Local Stores, Burgess Hill	0.50%	0%	0%	0%	0%	0%	0%	0%	0%	5.48%
	4	0	0	0	0	0	0	0	0	4
Local Stores, Hassocks	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
	1	0	0	0	0	0	0	0	0	1
Local Stores, Lewes Not In Town Centre	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Local Stores, Lewes TC	0.25%	1.74%	0%	0%	0%	0%	0%	0%	0%	0%
	2	2	0	0	0	0	0	0	0	0
Local Stores, Ringmer	0.50%	0%	0%	0%	4.29%	0%	0%	0%	0%	1.37%
	4	0	0	0	3	0	0	0	0	1
Local Stores , Seaford	0.75%	0%	0%	0%	0%	3.21%	0%	0%	0%	0%
	6	0	0	0	0	6	0	0	0	0
Morrisons, Seaford	14.68%	0.87%	0%	0%	0%	57.75%	6.32%	2.38%	0%	0%
	118	1	0	0	0	108	6	3	0	0
Morrisons , Brighton	0.25%	0%	0%	0%	0%	0%	0%	0%	3.12%	0%
	2	0	0	0	0	0	0	0	2	0
Sainsbury Local, North Street, Brighton	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
	1	0	0	0	0	0	0	0	1	0
Sainsbury Local, Portland Road, Hove	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
	1	0	0	0	0	0	0	0	0	1
Sainsbury Local, Western Road, Hove	0.12%	0%	3.12%	0%	0%	0%	0%	0%	0%	0%
	1	0	1	0	0	0	0	0	0	0
Sainsbury Local, Wivelsfield Road, Haywards Heath	0.62%	0%	0%	9.52%	0%	0%	0%	0%	0%	1.37%
	5	0	0	4	0	0	0	0	0	1
Sainsbury, Arndale Centre, Eastbourne	0.12%	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
	1	1	0	0	0	0	0	0	0	0
Sainsbury, Hampden Park, Eastbourne	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Sainsbury, Haywards Heath (Bannister Way)	1.37%	0%	0%	9.52%	0%	0%	0%	0%	0%	9.59%
	11	0	0	4	0	0	0	0	0	7
Sainsbury, Heathfield	0.25%	0%	0%	0%	1.43%	0%	0%	0%	0%	1.37%
	2	0	0	0	1	0	0	0	0	1
Sainsbury, Lewes Road, Brighton	0.25%	0.87%	0%	0%	0%	0%	0%	0%	1.56%	0%
	2	1	0	0	0	0	0	0	1	0
Sainsbury, Newhaven	19.78%	0%	6.25%	0%	4.29%	22.46%	66.32%	25.40%	26.56%	0%
	159	0	2	0	3	42	63	32	17	0
Sainsbury, West Hove	0.25%	0%	0%	0%	0%	0%	0%	0%	0%	2.74%
	2	0	0	0	0	0	0	0	0	2
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	0.25%	0%	0%	0%	0%	0%	0%	1.59%	0%	0%
	2	0	0	0	0	0	0	2	0	0
Tesco Express, Seaford	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Tesco Express, Woodingdean	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Tesco Metro, Eastbourne (Hampden Park)	0.25%	0%	0%	0%	0%	1.07%	0%	0%	0%	0%
	2	0	0	0	0	2	0	0	0	0
Tesco Metro, Langney Centre, Eastbourne	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Tesco, Burgess Hill	4.60%	0%	12.50%	7.14%	0%	0%	0%	0%	0%	41.10%
	37	0	4	3	0	0	0	0	0	30
Tesco, Hove	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
	1	0	0	0	0	0	0	0	1	0
Tesco, Lewes	14.30%	56.52%	25%	14.29%	48.57%	0%	1.05%	0%	1.56%	0%
	115	65	8	6	34	0	1	0	1	0
Tesco, Uckfield	1.62%	0.87%	0%	28.57%	0%	0%	0%	0%	0%	0%
	13	1	0	12	0	0	0	0	0	0
Waitrose, Brighton	0.12%	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Waitrose, Burgess Hill	1.74%	0%	6.25%	4.76%	0%	0%	0%	0%	0%	13.70%
	14	0	2	2	0	0	0	0	0	10
Waitrose, Eastbourne	0.75%	0%	0%	0%	0%	2.67%	0%	0.79%	0%	0%
	6	0	0	0	0	5	0	1	0	0

Waitrose, Hailsham	**0.12%**	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Waitrose, Lewes	**7.21%**	26.96%	25%	4.76%	20%	0%	1.05%	0.79%	0%	1.37%
	58	31	8	2	14	0	1	1	0	1
* Internet - Asda	**0.25%**	0%	0%	0%	0%	0%	0%	0.79%	1.56%	0%
	2	0	0	0	0	0	0	1	1	0
* Internet - Ocado	**1%**	0%	0%	0%	2.86%	1.60%	0%	1.59%	0%	1.37%
	8	0	0	0	2	3	0	2	0	1
* Internet - Sainsburys	**1.24%**	1.74%	3.12%	4.76%	0%	0.53%	2.11%	0.79%	1.56%	0%
	10	2	1	2	0	1	2	1	1	0
* Internet - Tesco	**2.24%**	0.87%	3.12%	4.76%	1.43%	3.21%	1.05%	3.17%	1.56%	1.37%
	18	1	1	2	1	6	1	4	1	1
Other	**1.49%**	0.87%	0%	7.14%	4.29%	0%	0%	0.79%	4.69%	1.37%
	12	1	0	3	3	0	0	1	3	1
Local Stores, Ripe	**0.25%**	0%	0%	0%	2.86%	0%	0%	0%	0%	0%
	2	0	0	0	2	0	0	0	0	0

Q2. How often do you visit () for your main food shopping?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
Daily	**3.73%**	4.35%	3.12%	0%	0%	3.74%	7.37%	3.17%	3.12%	5.48%
	30	5	1	0	0	7	7	4	2	4
2 to 3 time per week	**27.61%**	40%	28.12%	19.05%	35.71%	32.62%	30.53%	15.08%	10.94%	24.66%
	222	46	9	8	25	61	29	19	7	18
Weekly	**54.73%**	49.57%	46.88%	64.29%	54.29%	54.01%	52.63%	60.32%	53.12%	57.53%
	440	57	15	27	38	101	50	76	34	42
Fortnightly / once every two weeks	**10.82%**	2.61%	18.75%	14.29%	10%	8.02%	7.37%	15.87%	23.44%	10.96%
	87	3	6	6	7	15	7	20	15	8
Monthly	**3.11%**	3.48%	3.12%	2.38%	0%	1.60%	2.11%	5.56%	9.38%	1.37%
	25	4	1	1	0	3	2	7	6	1

Q3. What are your main reason(s) for using this store ()
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	1251	**185**	**53**	**56**	**105**	**307**	**142**	**196**	**102**	**105**
Better value for money	**1.84%**	0.54%	0%	0%	0%	1.95%	1.41%	4.08%	3.92%	1.90%
	23	1	0	0	0	6	2	8	4	2
Convenient to home	**27.34%**	30.81%	15.09%	33.93%	20.95%	28.99%	37.32%	16.84%	27.45%	31.43%
	342	57	8	19	22	89	53	33	28	33
Convenient to work	**2%**	0%	1.89%	1.79%	2.86%	2.61%	2.11%	1.53%	4.90%	0.95%
	25	0	1	1	3	8	3	3	5	1
Easy to get to	**7.43%**	7.03%	5.66%	3.57%	11.43%	10.10%	9.86%	5.10%	5.88%	1.90%
	93	13	3	2	12	31	14	10	6	2
Easy to get parking	**6%**	4.32%	5.66%	7.14%	11.43%	8.14%	3.52%	3.06%	6.86%	4.76%
	75	8	3	4	12	25	5	6	7	5
Good bus service	**0.32%**	0%	1.89%	0%	0%	0.33%	0%	0%	1.96%	0%
	4	0	1	0	0	1	0	0	2	0
Good service / friendly staff	**2.08%**	3.24%	5.66%	0%	0.95%	2.28%	2.11%	1.53%	0.98%	1.90%
	26	6	3	0	1	7	3	3	1	2
Habit / Always used it	**2.72%**	1.62%	1.89%	3.57%	0.95%	3.91%	2.11%	2.55%	0.98%	5.71%
	34	3	1	2	1	12	3	5	1	6
Has Petrol Station	**0.40%**	1.08%	0%	0%	0%	0%	0%	1.02%	0%	0.95%
	5	2	0	0	0	0	0	2	0	1
Internet / Home Delivery	**2.80%**	1.62%	5.66%	7.14%	2.86%	2.28%	2.82%	4.59%	0.98%	0.95%
	35	3	3	4	3	7	4	9	1	1
Layout	**0.48%**	0.54%	0%	0%	0%	0.65%	0%	1.53%	0%	0%
	6	1	0	0	0	2	0	3	0	0
Lower prices	**11.83%**	17.30%	5.66%	7.14%	10.48%	8.79%	9.15%	18.37%	13.73%	7.62%
	148	32	3	4	11	27	13	36	14	8
Loyalty scheme	**1.20%**	2.70%	3.77%	0%	0.95%	0.33%	2.11%	1.02%	0.98%	0%
	15	5	2	0	1	1	3	2	1	0
No Other Alternative	**1.76%**	0.54%	0%	0%	2.86%	1.63%	2.82%	3.06%	0%	2.86%
	22	1	0	0	3	5	4	6	0	3
No queues at checkouts	**0.24%**	0%	3.77%	0%	0%	0%	0%	0.51%	0%	0%
	3	0	2	0	0	0	0	1	0	0
Other shops/ Services nearby / Convenient	**1.28%**	0.54%	5.66%	1.79%	4.76%	0.33%	0%	1.53%	0.98%	0.95%
	16	1	3	1	5	1	0	3	1	1
Pleasant place to shop	**2.56%**	2.16%	1.89%	0%	2.86%	1.95%	3.52%	3.06%	2.94%	3.81%
	32	4	1	0	3	6	5	6	3	4
Preference for retailer	**1.84%**	2.16%	7.55%	1.79%	0%	0.33%	2.11%	2.55%	3.92%	0.95%
	23	4	4	1	0	1	3	5	4	1
Quality of goods	**11.99%**	13.51%	16.98%	8.93%	13.33%	11.73%	10.56%	10.71%	8.82%	15.24%
	150	25	9	5	14	36	15	21	9	16
Range / Availability of food products	**8.39%**	4.32%	5.66%	14.29%	10.48%	8.47%	4.23%	9.69%	9.80%	13.33%
	105	8	3	8	11	26	6	19	10	14
Range / Availability of non-food products	**1.04%**	0.54%	0%	0%	0.95%	1.63%	0.70%	1.53%	0.98%	0.95%
	13	1	0	0	1	5	1	3	1	1
Size of store	**1.12%**	1.08%	0%	3.57%	0%	0.65%	0.70%	2.04%	0%	2.86%
	14	2	0	2	0	2	1	4	0	3
Special Offers	**1.68%**	2.16%	1.89%	0%	0%	2.61%	1.41%	1.53%	2.94%	0%
	21	4	1	0	0	8	2	3	3	0
Support local business	**0.08%**	0%	0%	1.79%	0%	0%	0%	0%	0%	0%
	1	0	0	1	0	0	0	0	0	0
Within easy walking distance	**0.64%**	1.08%	0%	0%	0.95%	0%	1.41%	1.02%	0%	0.95%
	8	2	0	0	1	0	2	2	0	1
Work there	**0.48%**	0%	0%	1.79%	0%	0.33%	0%	1.53%	0.98%	0%
	6	0	0	1	0	1	0	3	1	0
Other	**0.48%**	1.08%	3.77%	1.79%	0.95%	0%	0%	0%	0%	0%
	6	2	2	1	1	0	0	0	0	0

Q4. While you were on your last main food shopping trip, did you (or anyone else with you) carry out any of the following activities:
BY

Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	908	**123**	**39**	**56**	**81**	**211**	**99**	**150**	**71**	**78**
	19.82%	10.57%	17.95%	28.57%	19.75%	15.17%	10.10%	36%	25.35%	17.95%
Shop for non-food items (e.g. clothes, electircal goods, etc)	**180**	13	7	16	16	32	10	54	18	14
	4.07%	3.25%	5.13%	5.36%	2.47%	5.21%	3.03%	6%	4.23%	0%
Use sports/leisure/entertainment facilities nearby	**37**	4	2	3	2	11	3	9	3	0
	25.22%	27.64%	41.03%	42.86%	33.33%	25.12%	20.20%	21.33%	11.27%	19.23%
Go to the bank, building society or cash point	**229**	34	16	24	27	53	20	32	8	15
	50.88%	58.54%	35.90%	23.21%	44.44%	54.50%	66.67%	36.67%	59.15%	62.82%
* None	**462**	72	14	13	36	115	66	55	42	49

Q5. How do you normally travel to do your main food shopping () ?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	66.42%	53.04%	75%	73.81%	80%	62.03%	63.16%	65.87%	70.31%	79.45%
Car (own / company)	**534**	61	24	31	56	116	60	83	45	58
	8.46%	10.43%	3.12%	11.90%	4.29%	8.02%	10.53%	10.32%	9.38%	4.11%
Car (passenger in friends / relatives car)	**68**	12	1	5	3	15	10	13	6	3
	0.25%	0.87%	0%	0%	0%	0.53%	0%	0%	0%	0%
Motorcycle / moped	**2**	1	0	0	0	1	0	0	0	0
	5.35%	6.09%	12.50%	4.76%	5.71%	4.81%	4.21%	3.17%	10.94%	2.74%
Bus	**43**	7	4	2	4	9	4	4	7	2
	0.25%	0.87%	0%	0%	0%	0%	1.05%	0%	0%	0%
Train/Rail	**2**	1	0	0	0	0	1	0	0	0
	12.69%	24.35%	3.12%	0%	5.71%	16.04%	15.79%	9.52%	4.69%	12.33%
Walk	**102**	28	1	0	4	30	15	12	3	9
	1%	0.87%	0%	0%	0%	2.14%	1.05%	1.59%	0%	0%
Taxi	**8**	1	0	0	0	4	1	2	0	0
	0.25%	0%	0%	0%	0%	0.53%	0%	0.79%	0%	0%
Bicycle	**2**	0	0	0	0	1	0	1	0	0
	5.22%	3.48%	6.25%	9.52%	4.29%	5.88%	3.16%	8.73%	4.69%	1.37%
* Internet / Home Delivery	**42**	4	2	4	3	11	3	11	3	1
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Other	**1**	0	0	0	0	0	1	0	0	0

Q6. Apart from (), are there any other stores that you regularly use for your main food shopping?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	873	**118**	**32**	**48**	**72**	**210**	**100**	**141**	**69**	**83**
	0.23%	0.85%	0%	0%	0%	0%	0%	0%	1.45%	0%
Aldi, London Road, Brighton	**2**	1	0	0	0	0	0	0	1	0
	1.60%	7.63%	0%	4.17%	2.78%	0%	0%	0%	1.45%	0%
Aldi, Lewes	**14**	9	0	2	2	0	0	0	1	0
	2.41%	0%	0%	0%	0%	0%	2%	9.22%	8.70%	0%
Asda, Brighton Marina	**21**	0	0	0	0	0	2	13	6	0
	1.95%	3.39%	3.12%	4.17%	1.39%	0%	4%	0.71%	0%	4.82%
Asda, Hollingbury, Brighton	**17**	4	1	2	1	0	4	1	0	4
	0.69%	0%	0%	0%	1.39%	2.38%	0%	0%	0%	0%
Asda, The Crumbles, Eastbourne	**6**	0	0	0	1	5	0	0	0	0
	0.69%	0%	0%	0%	0%	0%	0%	0%	0%	7.23%
Budgens, Hassocks	**6**	0	0	0	0	0	0	0	0	6
	0.11%	0%	0%	0%	1.39%	0%	0%	0%	0%	0%
Co-Op, Blatchington Road, Hove	**1**	0	0	0	1	0	0	0	0	0
	1.95%	0%	0%	0%	0%	8.10%	0%	0%	0%	0%
Co-Op, Broad Street, Seaford	**17**	0	0	0	0	17	0	0	0	0
	0.69%	0%	0%	0%	0%	0%	0%	0%	8.70%	0%
Co-Op, Longridge Avenue, Saltdean	**6**	0	0	0	0	0	0	0	6	0
	0.34%	0%	0%	0%	0%	0%	0%	0%	4.35%	0%
Co-Op, Lustrells Vale, Saltdean	**3**	0	0	0	0	0	0	0	3	0
	2.75%	0%	0%	0%	0%	0%	0%	15.60%	2.90%	0%
Co-Op, Meridian Centre, Peacehaven	**24**	0	0	0	0	0	0	22	2	0
	1.72%	0%	0%	0%	0%	1.43%	11%	0%	1.45%	0%
Co-Op, Newhaven	**15**	0	0	0	0	3	11	0	1	0
	0.23%	0%	0%	0%	0%	0.95%	0%	0%	0%	0%
Cost Cutter, Princes Drive, Seaford	**2**	0	0	0	0	2	0	0	0	0
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Iceland, Langney Road, Eastbourne	**1**	0	0	0	0	1	0	0	0	0
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Iceland, Langney Shopping Centre, Eastbourne	**1**	0	0	0	0	1	0	0	0	0
	0.80%	0%	0%	6.25%	0%	0%	0%	0%	0%	4.82%
Lidl, Burgess Hill	**7**	0	0	3	0	0	0	0	0	4
	0.34%	0%	0%	0%	1.39%	0.48%	1%	0%	0%	0%
Lidl, Eastbourne	**3**	0	0	0	1	1	1	0	0	0
	0.34%	0%	0%	0%	0%	0%	0%	0.71%	2.90%	0%
Lidl, Arundel Road, Kemptown, Brighton	**3**	0	0	0	0	0	0	1	2	0
	3.32%	0.85%	0%	0%	1.39%	4.76%	10%	4.26%	1.45%	0%
Lidl, Newhaven	**29**	1	0	0	1	10	10	6	1	0
	0.34%	0%	0%	0%	1.39%	0%	0%	0%	2.90%	0%
Local Stores, Brighton	**3**	0	0	0	1	0	0	0	2	0
	0.46%	0%	0%	0%	0%	0%	0%	0%	0%	4.82%
Local Stores, Burgess Hill	**4**	0	0	0	0	0	0	0	0	4
	0.23%	0%	0%	0%	0%	0%	0%	0%	0%	2.41%
Local Stores, Hassocks	**2**	0	0	0	0	0	0	0	0	2
	0.80%	4.24%	3.12%	0%	1.39%	0%	0%	0%	0%	0%
Local Stores, Lewes Not In Town Centre	**7**	5	1	0	1	0	0	0	0	0
	1.26%	8.47%	0%	2.08%	0%	0%	0%	0%	0%	0%
Local Stores, Lewes TC	**11**	10	0	1	0	0	0	0	0	0
	0.34%	0%	0%	0%	0%	0%	3%	0%	0%	0%
Local Stores, Newhaven	**3**	0	0	0	0	0	3	0	0	0
	0.23%	0%	0%	0%	0%	0%	0%	1.42%	0%	0%
Local Stores, Peacehaven, South Coast Road	**2**	0	0	0	0	0	0	2	0	0

	0.11%	0%	0%	0%	1.39%	0%	0%	0%	0%	0%
Local Stores, Ringmer	**1**	0	0	0	1	0	0	0	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	1.45%	0%
Local Stores, Saltdean	**1**	0	0	0	0	0	0	0	1	0
	0.11%	0%	0%	2.08%	0%	0%	0%	0%	0%	0%
Local Stores , Newick	**1**	0	0	1	0	0	0	0	0	0
	1.26%	0%	0%	0%	0%	5.24%	0%	0%	0%	0%
Local Stores , Seaford	**11**	0	0	0	0	11	0	0	0	0
	6.07%	0%	0%	0%	1.39%	16.67%	11%	2.84%	2.90%	0%
Morrisons, Seaford	**53**	0	0	0	1	35	11	4	2	0
	0.23%	0%	0%	0%	0%	0%	0%	0%	1.45%	1.20%
Morrisons , Brighton	**2**	0	0	0	0	0	0	0	1	1
	0.11%	0.85%	0%	0%	0%	0%	0%	0%	0%	0%
Sainsbury Local, Carden, Brighton	**1**	1	0	0	0	0	0	0	0	0
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Sainsbury Local, North Street, Brighton	**1**	0	0	0	0	1	0	0	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0.71%	0%	0%
Sainsbury Local, Old Steine, Brighton	**1**	0	0	0	0	0	0	1	0	0
	0.57%	0.85%	0%	0%	0%	0%	0%	2.84%	0%	0%
Sainsbury Local, Peacehaven (South Coast Road)	**5**	1	0	0	0	0	0	4	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	1.45%	0%
Sainsbury Local, Western Road, Brighton	**1**	0	0	0	0	0	0	0	1	0
	0.34%	0%	0%	6.25%	0%	0%	0%	0%	0%	0%
Sainsbury Local, Wivelsfield Road, Haywards Heath	**3**	0	0	3	0	0	0	0	0	0
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Sainsbury, Arndale Centre, Eastbourne	**1**	0	0	0	0	1	0	0	0	0
	0.34%	0.85%	0%	0%	0%	0.95%	0%	0%	0%	0%
Sainsbury, Hampden Park, Eastbourne	**3**	1	0	0	0	2	0	0	0	0
	1.15%	0.85%	0%	12.50%	0%	0%	0%	0%	0%	3.61%
Sainsbury, Haywards Heath (Bannister Way)	**10**	1	0	6	0	0	0	0	0	3
	0.11%	0.85%	0%	0%	0%	0%	0%	0%	0%	0%
Sainsbury, Lewes Road, Brighton	**1**	1	0	0	0	0	0	0	0	0
	9.97%	3.39%	6.25%	0%	2.78%	20%	11%	13.48%	10.14%	0%
Sainsbury, Newhaven	**87**	4	2	0	2	42	11	19	7	0
	0.57%	0%	0%	0%	0%	1.43%	0%	0.71%	0%	1.20%
Tesco Express, Eastbourne (Lottbridge Drove)	**5**	0	0	0	0	3	0	1	0	1
	0.80%	0%	0%	0%	0%	0%	0%	4.26%	0%	1.20%
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	**7**	0	0	0	0	0	0	6	0	1
	1.83%	0%	0%	0%	0%	7.62%	0%	0%	0%	0%
Tesco Express, Seaford	**16**	0	0	0	0	16	0	0	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0.71%	0%	0%
Tesco Express, Woodingdean	**1**	0	0	0	0	0	0	1	0	0
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Tesco Metro, Eastbourne (Hampden Park)	**1**	0	0	0	0	1	0	0	0	0
	0.34%	0%	0%	0%	0%	1.43%	0%	0%	0%	0%
Tesco Metro, Langney Centre, Eastbourne	**3**	0	0	0	0	3	0	0	0	0
	1.72%	0%	0%	8.33%	0%	0%	0%	0%	1.45%	12.05%
Tesco, Burgess Hill	**15**	0	0	4	0	0	0	0	1	10
	0.11%	0%	0%	0%	1.39%	0%	0%	0%	0%	0%
Tesco, Hailsham	**1**	0	0	0	1	0	0	0	0	0
	4.93%	10.17%	15.62%	6.25%	15.28%	0.48%	6%	2.13%	1.45%	1.20%
Tesco, Lewes	**43**	12	5	3	11	1	6	3	1	1
	0.23%	0%	0%	2.08%	1.39%	0%	0%	0%	0%	0%
Tesco, Uckfield	**2**	0	0	1	1	0	0	0	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	1.45%	0%
Waitrose, Brighton	**1**	0	0	0	0	0	0	0	1	0
	1.49%	0%	6.25%	0%	0%	0%	0%	0%	0%	13.25%
Waitrose, Burgess Hill	**13**	0	2	0	0	0	0	0	0	11
	0.23%	0%	0%	0%	0%	0.95%	0%	0%	0%	0%
Waitrose, Eastbourne	**2**	0	0	0	0	2	0	0	0	0
	0.23%	0%	0%	0%	2.78%	0%	0%	0%	0%	0%
Waitrose, Hailsham	**2**	0	0	0	2	0	0	0	0	0
	7.45%	26.27%	9.38%	4.17%	27.78%	0.95%	1%	1.42%	2.90%	2.41%
Waitrose, Lewes	**65**	31	3	2	20	2	1	2	2	2
	0.34%	0%	0%	0%	0%	0.95%	0%	0%	0%	1.20%
* Internet - Asda	**3**	0	0	0	0	2	0	0	0	1
	0.34%	0%	0%	0%	2.78%	0%	0%	0%	0%	1.20%
* Internet - Ocado	**3**	0	0	0	2	0	0	0	0	1
	0.23%	0%	0%	0%	0%	0%	0%	0.71%	1.45%	0%
* Internet - Sainsburys	**2**	0	0	0	0	0	0	1	1	0
	0.69%	0%	0%	0%	0%	0.95%	0%	1.42%	1.45%	1.20%
* Internet - Tesco	**6**	0	0	0	0	2	0	2	1	1
	28.64%	28.81%	53.12%	16.67%	29.17%	18.10%	40%	34.04%	26.09%	31.33%
* Nowhere else	**250**	34	17	8	21	38	40	48	18	26
	1.95%	0.85%	3.12%	16.67%	0%	0.48%	0%	0.71%	2.90%	3.61%
Other	**17**	1	1	8	0	1	0	1	2	3
	0.34%	0%	0%	6.25%	0%	0%	0%	0%	0%	0%
Waitrose, Uckfield	**3**	0	0	3	0	0	0	0	0	0
	0.57%	0.85%	0%	0%	0%	0%	0%	1.42%	2.90%	0%
M&S, Western Road, Brighton	**5**	1	0	0	0	0	0	2	2	0
	0.69%	0%	0%	2.08%	0%	0%	0%	0.71%	4.35%	1.20%
Tesco, Holmbush Centre, Shoreham-by-Sea	**6**	0	0	1	0	0	0	1	3	1
	0.92%	0%	0%	0%	1.39%	3.33%	0%	0%	0%	0%
M&S, Eastbourne	**8**	0	0	0	1	7	0	0	0	0

Q7. Which store(s) do you usually use for your TOP-UP food shopping? (e.g. bread/milk)
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	881	**124**	**34**	**48**	**71**	**207**	**105**	**143**	**70**	**79**
	0.79%	4.03%	2.94%	0%	1.41%	0%	0%	0%	0%	0%
Aldi, Lewes	**7**	5	1	0	1	0	0	0	0	0
	0.57%	0%	0%	0%	0%	0%	0%	2.10%	1.43%	1.27%
Asda, Brighton Marina	**5**	0	0	0	0	0	0	3	1	1
	0.79%	1.61%	2.94%	2.08%	1.41%	0%	0%	0.70%	1.43%	0%
Asda, Hollingbury, Brighton	**7**	2	1	1	1	0	0	1	1	0
	0.34%	0%	0%	0%	0%	0.97%	0.95%	0%	0%	0%
Asda, The Crumbles, Eastbourne	**3**	0	0	0	0	2	1	0	0	0

	2.61%	0%	0%	0%	0%	0%	0%	0%	0%	29.11%
Budgens, Hassocks	**23**	0	0	0	0	0	0	0	0	23
	0.23%	0%	0%	0%	1.41%	0%	0.95%	0%	0%	0%
Co-Op, Blatchington Road, Hove	**2**	0	0	0	1	0	1	0	0	0
	1.25%	0%	0%	0%	0%	5.31%	0%	0%	0%	0%
Co-Op, Broad Street, Seaford	**11**	0	0	0	0	11	0	0	0	0
	2.50%	0%	0%	0%	0%	0%	0%	0%	31.43%	0%
Co-Op, Longridge Avenue, Saltdean	**22**	0	0	0	0	0	0	0	22	0
	1.48%	0%	0%	0%	0%	0%	0%	0%	18.57%	0%
Co-Op, Lustrells Vale, Saltdean	**13**	0	0	0	0	0	0	0	13	0
	6.81%	0%	0%	0%	0%	0%	2.86%	39.16%	1.43%	0%
Co-Op, Meridian Centre, Peacehaven	**60**	0	0	0	0	0	3	56	1	0
	2.84%	0%	0%	0%	0%	1.45%	19.05%	0.70%	1.43%	0%
Co-Op, Newhaven	**25**	0	0	0	0	3	20	1	1	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	1.43%	0%
Co-Op, Rottingdean	**1**	0	0	0	0	0	0	0	1	0
	0.45%	0%	0%	0%	0%	1.93%	0%	0%	0%	0%
Cost Cutter, Princes Drive, Seaford	**4**	0	0	0	0	4	0	0	0	0
	0.23%	0%	0%	2.08%	0%	0%	0%	0%	0%	1.27%
Iceland, Haywards Heath	**2**	0	0	1	0	0	0	0	0	1
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Iceland , Blatchington Road, Hove	**1**	0	0	0	0	1	0	0	0	0
	0.34%	0%	0%	0%	0%	0%	0%	0%	0%	3.80%
Lidl, Burgess Hill	**3**	0	0	0	0	0	0	0	0	3
	0.11%	0%	0%	0%	0%	0%	0.95%	0%	0%	0%
Lidl, Eastbourne	**1**	0	0	0	0	0	1	0	0	0
	0.91%	0%	2.94%	0%	0%	0.48%	2.86%	1.40%	1.43%	0%
Lidl, Newhaven	**8**	0	1	0	0	1	3	2	1	0
	0.34%	0%	0%	0%	0%	0.48%	0%	0.70%	1.43%	0%
Local Stores, Brighton	**3**	0	0	0	0	1	0	1	1	0
	1.70%	0%	0%	0%	0%	0%	0%	0%	0%	18.99%
Local Stores, Burgess Hill	**15**	0	0	0	0	0	0	0	0	15
	0.23%	0%	0%	0%	0%	0%	0%	0%	0%	2.53%
Local Stores, Ditchling	**2**	0	0	0	0	0	0	0	0	2
	0.34%	0%	0%	0%	0%	1.45%	0%	0%	0%	0%
Local Stores, Eastbourne	**3**	0	0	0	0	3	0	0	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	0%	1.27%
Local Stores, Hassocks	**1**	0	0	0	0	0	0	0	0	1
	3.18%	12.90%	5.88%	2.08%	7.04%	0.97%	0%	0%	0%	2.53%
Local Stores, Lewes Not In Town Centre	**28**	16	2	1	5	2	0	0	0	2
	2.95%	16.13%	11.76%	0%	2.82%	0%	0%	0%	0%	0%
Local Stores, Lewes TC	**26**	20	4	0	2	0	0	0	0	0
	1.02%	0%	0%	0%	0%	0.48%	7.62%	0%	0%	0%
Local Stores, Newhaven	**9**	0	0	0	0	1	8	0	0	0
	0.57%	0%	0%	0%	0%	0%	0.95%	2.80%	0%	0%
Local Stores, Peacehaven, Meridian Centre	**5**	0	0	0	0	0	1	4	0	0
	0.45%	0%	0%	0%	0%	0%	0%	2.80%	0%	0%
Local Stores, Peacehaven, South Coast Road	**4**	0	0	0	0	0	0	4	0	0
	2.04%	0%	0%	0%	25.35%	0%	0%	0%	0%	0%
Local Stores, Ringmer	**18**	0	0	0	18	0	0	0	0	0
	1.14%	0%	2.94%	0%	0%	0%	0%	0%	12.86%	0%
Local Stores, Saltdean	**10**	0	1	0	0	0	0	0	9	0
	0.11%	0.81%	0%	0%	0%	0%	0%	0%	0%	0%
Local Stores, Uckfield	**1**	1	0	0	0	0	0	0	0	0
	1.59%	0.81%	0%	27.08%	0%	0%	0%	0%	0%	0%
Local Stores , Newick	**14**	1	0	13	0	0	0	0	0	0
	4.54%	0%	0%	0%	0%	19.32%	0%	0%	0%	0%
Local Stores , Seaford	**40**	0	0	0	0	40	0	0	0	0
	7.26%	0%	0%	0%	0%	28.99%	1.90%	1.40%	0%	0%
Morrisons, Seaford	**64**	0	0	0	0	60	2	2	0	0
	0.11%	0%	0%	0%	0%	0%	0%	0%	1.43%	0%
Morrisons , Brighton	**1**	0	0	0	0	0	0	0	1	0
	1.59%	0%	0%	0%	0%	0%	1.90%	8.39%	0%	0%
Sainsbury Local, Peacehaven (South Coast Road)	**14**	0	0	0	0	0	2	12	0	0
	0.11%	0%	0%	0%	0%	0%	0.95%	0%	0%	0%
Sainsbury Local, Portland Road, Hove	**1**	0	0	0	0	0	1	0	0	0
	0.45%	0%	0%	4.17%	0%	0%	0%	0%	0%	2.53%
Sainsbury Local, Wivelsfield Road, Haywards Heath	**4**	0	0	2	0	0	0	0	0	2
	0.11%	0%	0%	0%	0%	0.48%	0%	0%	0%	0%
Sainsbury, Hampden Park, Eastbourne	**1**	0	0	0	0	1	0	0	0	0
	0.11%	0%	0%	2.08%	0%	0%	0%	0%	0%	0%
Sainsbury, Haywards Heath (Bannister Way)	**1**	0	0	1	0	0	0	0	0	0
	0.11%	0.81%	0%	0%	0%	0%	0%	0%	0%	0%
Sainsbury, Lewes Road, Brighton	**1**	1	0	0	0	0	0	0	0	0
	7.38%	0%	5.88%	0%	0%	5.31%	40%	6.29%	1.43%	0%
Sainsbury, Newhaven	**65**	0	2	0	0	11	42	9	1	0
	2.72%	0.81%	0%	0%	0%	0%	0%	16.08%	0%	0%
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	**24**	1	0	0	0	0	0	23	0	0
	0.23%	0%	0%	0%	0%	0%	0%	0.70%	1.43%	0%
Tesco Express, Rottingdean	**2**	0	0	0	0	0	0	1	1	0
	2.72%	0.81%	0%	0%	0%	11.11%	0%	0%	0%	0%
Tesco Express, Seaford	**24**	1	0	0	0	23	0	0	0	0
	0.79%	0%	0%	2.08%	0%	0%	0%	0%	0%	7.59%
Tesco, Burgess Hill	**7**	0	0	1	0	0	0	0	0	6
	4.54%	19.35%	8.82%	4.17%	9.86%	0%	0.95%	2.10%	0%	0%
Tesco, Lewes	**40**	24	3	2	7	0	1	3	0	0
	0.91%	0.81%	0%	12.50%	0%	0%	0.95%	0%	0%	0%
Tesco, Uckfield	**8**	1	0	6	0	0	1	0	0	0
	0.34%	0%	0%	0%	0%	0%	0%	0%	0%	3.80%
Waitrose, Burgess Hill	**3**	0	0	0	0	0	0	0	0	3
	0.11%	0%	0%	0%	1.41%	0%	0%	0%	0%	0%
Waitrose, Hailsham	**1**	0	0	0	1	0	0	0	0	0
	5.11%	25%	8.82%	4.17%	8.45%	0.48%	0%	0%	0%	2.53%
Waitrose, Lewes	**45**	31	3	2	6	1	0	0	0	2
	0.34%	0%	0%	0%	2.82%	0%	0%	0%	0%	1.27%
* Internet - Ocado	**3**	0	0	0	2	0	0	0	0	1
	0.34%	0%	0%	0%	0%	0.48%	0.95%	0%	1.43%	0%
* Internet - Sainsburys	**3**	0	0	0	0	1	1	0	1	0
	0.11%	0%	0%	0%	0%	0%	0%	0.70%	0%	0%
* Internet - Tesco	**1**	0	0	0	0	0	0	1	0	0
	16.80%	16.13%	23.53%	10.42%	28.17%	19.32%	14.29%	11.19%	15.71%	16.46%

* Don't do this type of shopping	**148**	20	8	5	20	40	15	16	11	13
	2.38%	0%	5.88%	6.25%	1.41%	0.48%	1.90%	2.80%	5.71%	5.06%
Other	**21**	0	2	3	1	1	2	4	4	4
	0.34%	0%	0%	0%	4.23%	0%	0%	0%	0%	0%
Local Stores, Ripe	**3**	0	0	0	3	0	0	0	0	0
	1.02%	0%	0%	18.75%	0%	0%	0%	0%	0%	0%
Local Stores, Chailey	**9**	0	0	9	0	0	0	0	0	0
	0.34%	0%	0%	0%	4.23%	0%	0%	0%	0%	0%
Local Stores, Firle	**3**	0	0	0	3	0	0	0	0	0
	0.79%	0%	17.65%	2.08%	0%	0%	0%	0%	0%	0%
Local Stores, Plumpton Green	**7**	0	6	1	0	0	0	0	0	0

Q8. How frequently do you carry out top up food shopping?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	656	**95**	**24**	**37**	**50**	**147**	**80**	**110**	**53**	**60**
	8.69%	9.47%	8.33%	0%	6%	9.52%	11.25%	7.27%	13.21%	8.33%
Daily	**57**	9	2	0	3	14	9	8	7	5
	37.96%	48.42%	37.50%	40.54%	34%	26.53%	40%	36.36%	43.40%	46.67%
2 to 3 time per week	**249**	46	9	15	17	39	32	40	23	28
	34.45%	25.26%	33.33%	32.43%	34%	44.90%	33.75%	34.55%	30.19%	30%
Weekly	**226**	24	8	12	17	66	27	38	16	18
	9.91%	11.58%	8.33%	16.22%	12%	6.12%	6.25%	14.55%	3.77%	13.33%
Fortnightly / once every two weeks	**65**	11	2	6	6	9	5	16	2	8
	4.57%	2.11%	12.50%	5.41%	8%	4.76%	5%	2.73%	7.55%	1.67%
Monthly	**30**	2	3	2	4	7	4	3	4	1
	4.42%	3.16%	0%	5.41%	6%	8.16%	3.75%	4.55%	1.89%	0%
Less often/infrequently	**29**	3	0	2	3	12	3	5	1	0

Q9. How do you normally travel to do your top-up food shopping?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	656	**95**	**24**	**37**	**50**	**147**	**80**	**110**	**53**	**60**
	42.53%	29.47%	58.33%	62.16%	44%	47.62%	45%	44.55%	24.53%	40%
Car (own / company)	**279**	28	14	23	22	70	36	49	13	24
	3.20%	1.05%	0%	5.41%	2%	5.44%	5%	2.73%	1.89%	1.67%
Car (passenger in friends / relatives car)	**21**	1	0	2	1	8	4	3	1	1
	0.15%	0%	0%	0%	0%	0%	1.25%	0%	0%	0%
Motorcycle / moped	**1**	0	0	0	0	0	1	0	0	0
	4.42%	6.32%	0%	5.41%	2%	7.48%	5%	0.91%	5.66%	1.67%
Bus	**29**	6	0	2	1	11	4	1	3	1
	0.15%	0%	0%	0%	0%	0.68%	0%	0%	0%	0%
Train/Rail	**1**	0	0	0	0	1	0	0	0	0
	46.80%	62.11%	33.33%	24.32%	46%	36.05%	41.25%	48.18%	66.04%	56.67%
Walk	**307**	59	8	9	23	53	33	53	35	34
	0.61%	0%	0%	0%	0%	1.36%	0%	1.82%	0%	0%
Taxi	**4**	0	0	0	0	2	0	2	0	0
	1.07%	1.05%	8.33%	2.70%	2%	0.68%	0%	0.91%	0%	0%
Bicycle	**7**	1	2	1	1	1	0	1	0	0
	1.07%	0%	0%	0%	4%	0.68%	2.50%	0.91%	1.89%	0%
* Internet / Home Delivery	**7**	0	0	0	2	1	2	1	1	0

Q10. Where do you do most of your households shopping for clothing, footwear and other fashion goods?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	1.24%	0%	0%	0%	4.29%	0.53%	6.32%	0%	0%	0%
Eastbourne, Admiral Retail Park	**10**	0	0	0	3	1	6	0	0	0
	0.50%	0%	0%	0%	0%	0.53%	0%	1.59%	1.56%	0%
Brighton, Asda Brighton Marina	**4**	0	0	0	0	1	0	2	1	0
	0.62%	0%	0%	0%	0%	2.67%	0%	0%	0%	0%
Eastbourne, Asda Crumbles	**5**	0	0	0	0	5	0	0	0	0
	0.37%	0%	0%	4.76%	0%	0%	0%	0.79%	0%	0%
Brighton, Asda Hollingbury	**3**	0	0	2	0	0	0	1	0	0
	0.25%	0%	0%	0%	0%	0.53%	0%	0.79%	0%	0%
Bluewater	**2**	0	0	0	0	1	0	1	0	0
	38.43%	44.35%	34.38%	19.05%	32.86%	12.30%	35.79%	63.49%	70.31%	46.58%
Brighton	**309**	51	11	8	23	23	34	80	45	34
	0.12%	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
Lewes, Brooks Road Retail Park	**1**	1	0	0	0	0	0	0	0	0
	1%	0.87%	3.12%	4.76%	0%	0%	0%	0%	0%	5.48%
Burgess Hill	**8**	1	1	2	0	0	0	0	0	4
	1.37%	3.48%	0%	0%	1.43%	0%	0%	1.59%	1.56%	4.11%
Central London	**11**	4	0	0	1	0	0	2	1	3
	1.24%	0%	3.12%	11.90%	0%	0%	0%	0%	0%	5.48%
Crawley	**10**	0	1	5	0	0	0	0	0	4
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
Croydon	**1**	0	0	0	0	0	0	0	1	0
	21.27%	7.83%	6.25%	7.14%	10%	54.55%	29.47%	10.32%	7.81%	2.74%
Eastbourne	**171**	9	2	3	7	102	28	13	5	2
	2.49%	0%	6.25%	11.90%	0%	0%	0%	0%	0%	17.81%
Haywards Heath	**20**	0	2	5	0	0	0	0	0	13
	0.37%	0.87%	0%	0%	1.43%	0%	0%	0.79%	0%	0%
Hove	**3**	1	0	0	1	0	0	1	0	0
	0.25%	0%	0%	0%	0%	0%	2.11%	0%	0%	0%
Eastbourne, Langney Centre	**2**	0	0	0	0	0	2	0	0	0
	6.34%	20%	28.12%	9.52%	15.71%	0.53%	1.05%	0.79%	0%	1.37%
Lewes	**51**	23	9	4	11	1	1	1	0	1
	0.50%	0%	0%	0%	0%	0%	4.21%	0%	0%	0%
Newhaven	**4**	0	0	0	0	0	4	0	0	0
	0.62%	0%	0%	0%	0%	0%	0%	3.97%	0%	0%

Peacehaven (Meridian Centre)	**5**	0	0	0	0	0	0	5	0	0
	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
Peacehaven (South Coast Road)	**1**	0	0	0	0	1	0	0	0	0
	3.98%	0%	0%	0%	0%	13.90%	5.26%	0.79%	0%	0%
Seaford	**32**	0	0	0	0	26	5	1	0	0
	0.37%	0.87%	0%	0%	1.43%	0%	1.05%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**3**	1	0	0	1	0	1	0	0	0
	1.37%	1.74%	0%	16.67%	0%	0%	0%	0%	3.12%	0%
Tunbridge Wells	**11**	2	0	7	0	0	0	0	2	0
	0.50%	1.74%	0%	2.38%	1.43%	0%	0%	0%	0%	0%
Uckfield	**4**	2	0	1	1	0	0	0	0	0
	5.97%	6.09%	12.50%	9.52%	8.57%	6.42%	6.32%	3.97%	3.12%	2.74%
* Internet	**48**	7	4	4	6	12	6	5	2	2
	6.22%	7.83%	6.25%	2.38%	11.43%	6.42%	3.16%	5.56%	3.12%	8.22%
* Catalogue/Mail Order	**50**	9	2	1	8	12	3	7	2	6
	2.11%	1.74%	0%	0%	5.71%	0.53%	3.16%	3.97%	3.12%	0%
* Don't do this type of shopping	**17**	2	0	0	4	1	3	5	2	0
	0.87%	1.74%	0%	0%	0%	0%	2.11%	0.79%	1.56%	1.37%
Other	**7**	2	0	0	0	0	2	1	1	1
	1.37%	0%	0%	0%	5.71%	0.53%	0%	0.79%	3.12%	4.11%
Shoreham-by-Sea	**11**	0	0	0	4	1	0	1	2	3

Q11. Apart from (), where else do you do your households shopping for clothing, footwear and other fashion goods?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	792	**113**	**32**	**42**	**66**	**186**	**92**	**124**	**64**	**73**
	0.88%	0%	0%	0%	1.52%	2.15%	1.09%	0.81%	0%	0%
Eastbourne, Admiral Retail Park	**7**	0	0	0	1	4	1	1	0	0
	0.63%	0.88%	3.12%	0%	0%	0%	0%	1.61%	1.56%	0%
Brighton, Asda Brighton Marina	**5**	1	1	0	0	0	0	2	1	0
	0.63%	0%	0%	0%	0%	1.08%	3.26%	0%	0%	0%
Eastbourne, Asda Crumbles	**5**	0	0	0	0	2	3	0	0	0
	0.38%	0%	0%	2.38%	0%	0.54%	1.09%	0%	0%	0%
Brighton, Asda Hollingbury	**3**	0	0	1	0	1	1	0	0	0
	0.76%	0%	0%	4.76%	1.52%	0%	0%	0%	3.12%	1.37%
Bluewater	**6**	0	0	2	1	0	0	0	2	1
	18.94%	24.78%	15.62%	19.05%	28.79%	19.89%	22.83%	12.90%	9.38%	13.70%
Brighton	**150**	28	5	8	19	37	21	16	6	10
	0.25%	0.88%	0%	0%	0%	0.54%	0%	0%	0%	0%
Horsham, Broadbridge Heath Retail Park	**2**	1	0	0	0	1	0	0	0	0
	1.64%	1.77%	0%	7.14%	0%	0%	0%	0%	0%	10.96%
Burgess Hill	**13**	2	0	3	0	0	0	0	0	8
	2.53%	0.88%	3.12%	0%	6.06%	1.61%	0%	2.42%	9.38%	2.74%
Central London	**20**	1	1	0	4	3	0	3	6	2
	2.78%	1.77%	6.25%	7.14%	0%	0.54%	0%	2.42%	1.56%	13.70%
Crawley	**22**	2	2	3	0	1	0	3	1	10
	14.02%	9.73%	6.25%	0%	18.18%	19.35%	13.04%	24.19%	10.94%	1.37%
Eastbourne	**111**	11	2	0	12	36	12	30	7	1
	0.13%	0%	0%	0%	0%	0%	0%	0.81%	0%	0%
Hailsham	**1**	0	0	0	0	0	0	1	0	0
	2.15%	1.77%	6.25%	19.05%	1.52%	0%	0%	0%	0%	5.48%
Haywards Heath	**17**	2	2	8	1	0	0	0	0	4
	0.25%	0.88%	0%	0%	0%	0%	0%	0%	0%	1.37%
Heathfield	**2**	1	0	0	0	0	0	0	0	1
	0.38%	0%	0%	2.38%	0%	0.54%	1.09%	0%	0%	0%
Horsham	**3**	0	0	1	0	1	1	0	0	0
	0.38%	0%	0%	0%	0%	0%	0%	1.61%	0%	1.37%
Hove	**3**	0	0	0	0	0	0	2	0	1
	0.13%	0%	0%	0%	0%	0%	1.09%	0%	0%	0%
Eastbourne, Langney Centre	**1**	0	0	0	0	0	1	0	0	0
	5.43%	15.93%	15.62%	2.38%	10.61%	1.08%	4.35%	0.81%	3.12%	4.11%
Lewes	**43**	18	5	1	7	2	4	1	2	3
	1.77%	0.88%	0%	0%	0%	2.15%	6.52%	1.61%	1.56%	0%
Newhaven	**14**	1	0	0	0	4	6	2	1	0
	0.13%	0%	0%	0%	0%	0%	1.09%	0%	0%	0%
Brighton, Pavillion Retail Park	**1**	0	0	0	0	0	1	0	0	0
	0.76%	0%	0%	0%	0%	0.54%	0%	4.03%	0%	0%
Peacehaven (Meridian Centre)	**6**	0	0	0	0	1	0	5	0	0
	0.13%	0.88%	0%	0%	0%	0%	0%	0%	0%	0%
Tunbridge Wells, Retail Warehousing	**1**	1	0	0	0	0	0	0	0	0
	2.15%	0.88%	3.12%	0%	0%	4.84%	4.35%	1.61%	0%	0%
Seaford	**17**	1	1	0	0	9	4	2	0	0
	0.25%	0%	0%	0%	0%	0.54%	1.09%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**2**	0	0	0	0	1	1	0	0	0
	0.13%	0.88%	0%	0%	0%	0%	0%	0%	0%	0%
Lewes, Tesco	**1**	1	0	0	0	0	0	0	0	0
	0.13%	0%	0%	0%	0%	0%	1.09%	0%	0%	0%
Newhaven, The Drove Retail Park	**1**	0	0	0	0	0	1	0	0	0
	1.26%	0.88%	3.12%	2.38%	3.03%	1.61%	0%	0.81%	0%	1.37%
Tunbridge Wells	**10**	1	1	1	2	3	0	1	0	1
	0.25%	0%	0%	2.38%	1.52%	0%	0%	0%	0%	0%
Uckfield	**2**	0	0	1	1	0	0	0	0	0
	2.78%	0.88%	0%	2.38%	1.52%	3.23%	5.43%	2.42%	1.56%	5.48%
* Internet	**22**	1	0	1	1	6	5	3	1	4
	1.64%	1.77%	3.12%	0%	1.52%	2.15%	0%	1.61%	1.56%	2.74%
* Catalogue/Mail Order	**13**	2	1	0	1	4	0	2	1	2
	33.84%	32.74%	31.25%	21.43%	19.70%	36.56%	31.52%	38.71%	50%	30.14%
* Nowhere else	**268**	37	10	9	13	68	29	48	32	22
	1.14%	0.88%	0%	4.76%	4.55%	0.54%	1.09%	0%	1.56%	0%
Other	**9**	1	0	2	3	1	1	0	1	0
	1.14%	0%	3.12%	2.38%	0%	0.54%	0%	0.81%	3.12%	4.11%
Shoreham-by-Sea	**9**	0	1	1	0	1	0	1	2	3
	0.25%	0%	0%	0%	0%	0%	0%	0.81%	1.56%	0%
Worthing	**2**	0	0	0	0	0	0	1	1	0

Q12. Where do you do most of your households shopping for chemist and personal care goods including cosmetics etc?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	115	32	42	70	187	95	126	64	73
Brighton, Asda Brighton Marina	2.11%	0%	0%	0%	0%	0%	1.05%	10.32%	4.69%	0%
	17	0	0	0	0	0	1	13	3	0
Brighton, Asda Hollingbury	0.50%	2.61%	0%	0%	0%	0%	0%	0%	0%	1.37%
	4	3	0	0	0	0	0	0	0	1
Brighton	8.08%	2.61%	3.12%	4.76%	4.29%	2.14%	3.16%	21.43%	26.56%	6.85%
	65	3	1	2	3	4	3	27	17	5
Lewes, Brooks Road Retail Park	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
	1	0	0	0	0	0	1	0	0	0
Burgess Hill	4.35%	0%	18.75%	4.76%	0%	0%	0%	0%	0%	36.99%
	35	0	6	2	0	0	0	0	0	27
Central London	0.37%	0.87%	0%	0%	0%	1.07%	0%	0%	0%	0%
	3	1	0	0	0	2	0	0	0	0
Crawley	0.25%	0%	0%	2.38%	0%	0%	0%	0.79%	0%	0%
	2	0	0	1	0	0	0	1	0	0
Eastbourne	2.99%	1.74%	0%	0%	5.71%	5.88%	4.21%	2.38%	0%	0%
	24	2	0	0	4	11	4	3	0	0
Hailsham	0.50%	0%	0%	0%	5.71%	0%	0%	0%	0%	0%
	4	0	0	0	4	0	0	0	0	0
Haywards Heath	2.36%	0%	6.25%	14.29%	0%	0%	0%	0%	0%	15.07%
	19	0	2	6	0	0	0	0	0	11
Hove	0.37%	0%	0%	0%	1.43%	0%	0%	0%	1.56%	1.37%
	3	0	0	0	1	0	0	0	1	1
Eastbourne, Langney Centre	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
	1	0	0	0	0	0	1	0	0	0
Lewes	20.27%	84.35%	68.75%	16.67%	48.57%	0%	0%	0.79%	1.56%	1.37%
	163	97	22	7	34	0	0	1	1	1
Newhaven	11.19%	0%	3.12%	0%	0%	2.67%	77.89%	3.97%	7.81%	0%
	90	0	1	0	0	5	74	5	5	0
Newick	1.62%	0%	0%	30.95%	0%	0%	0%	0%	0%	0%
	13	0	0	13	0	0	0	0	0	0
Peacehaven (Meridian Centre)	5.72%	0.87%	0%	0%	0%	0%	0%	35.71%	0%	0%
	46	1	0	0	0	0	0	45	0	0
Peacehaven (South Coast Road)	2.24%	0%	0%	0%	0%	0%	0%	14.29%	0%	0%
	18	0	0	0	0	0	0	18	0	0
Ringmer	1.99%	0%	0%	0%	22.86%	0%	0%	0%	0%	0%
	16	0	0	0	16	0	0	0	0	0
Seaford	19.90%	0%	0%	0%	0%	82.89%	4.21%	0.79%	0%	0%
	160	0	0	0	0	155	4	1	0	0
Sevenoaks	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
	1	0	0	0	0	0	1	0	0	0
Lewes, Tesco	0.87%	4.35%	0%	0%	1.43%	0%	0%	0%	1.56%	0%
	7	5	0	0	1	0	0	0	1	0
Eastbourne, Tesco Extra	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Tunbridge Wells	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
	1	0	0	1	0	0	0	0	0	0
Uckfield	0.75%	0.87%	0%	7.14%	2.86%	0%	0%	0%	0%	0%
	6	1	0	3	2	0	0	0	0	0
* Internet	1.74%	0.87%	0%	2.38%	1.43%	1.07%	1.05%	3.17%	1.56%	4.11%
	14	1	0	1	1	2	1	4	1	3
* Catalogue/Mail Order	1%	0%	0%	2.38%	0%	0.53%	2.11%	1.59%	1.56%	1.37%
	8	0	0	1	0	1	2	2	1	1
* Don't do this type of shopping	1.12%	0.87%	0%	0%	2.86%	1.07%	1.05%	0.79%	1.56%	1.37%
	9	1	0	0	2	2	1	1	1	1
Other	1.74%	0%	0%	11.90%	2.86%	0%	2.11%	0.79%	4.69%	1.37%
	14	0	0	5	2	0	2	1	3	1
Saltdean	3.98%	0%	0%	0%	0%	0%	0%	0.79%	46.88%	1.37%
	32	0	0	0	0	0	0	1	30	1
Hassocks	2.11%	0%	0%	0%	0%	0%	0%	0%	0%	23.29%
	17	0	0	0	0	0	0	0	0	17
Ditchling	0.37%	0%	0%	0%	0%	0%	0%	0%	0%	4.11%
	3	0	0	0	0	0	0	0	0	3
Morrisons, Seaford	0.50%	0%	0%	0%	0%	2.14%	0%	0%	0%	0%
	4	0	0	0	0	4	0	0	0	0
Telsecombe cliffs	0.37%	0%	0%	0%	0%	0%	0%	2.38%	0%	0%
	3	0	0	0	0	0	0	3	0	0

Q13. Where do you do most of your households shopping for books, DVD's, CD's, stationery and cards?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	115	32	42	70	187	95	126	64	73
Eastbourne, Admiral Retail Park	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Brighton, Asda Brighton Marina	1.49%	0%	0%	0%	0%	0%	0%	7.14%	4.69%	0%
	12	0	0	0	0	0	0	9	3	0
Eastbourne, Asda Crumbles	0.25%	0%	0%	0%	0%	0.53%	1.05%	0%	0%	0%
	2	0	0	0	0	1	1	0	0	0
Brighton, Asda Hollingbury	0.25%	1.74%	0%	0%	0%	0%	0%	0%	0%	0%
	2	2	0	0	0	0	0	0	0	0
Brighton	11.82%	6.96%	3.12%	2.38%	5.71%	3.74%	7.37%	25.40%	42.19%	10.96%
	95	8	1	1	4	7	7	32	27	8
Burgess Hill	3.86%	1.74%	15.62%	7.14%	0%	0%	0%	0%	0%	28.77%
	31	2	5	3	0	0	0	0	0	21
Central London	0.37%	0.87%	0%	0%	0%	0.53%	0%	0%	0%	1.37%
	3	1	0	0	0	1	0	0	0	1
Crawley	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
	1	0	0	0	0	0	0	0	0	1
Eastbourne	5.97%	2.61%	0%	0%	4.29%	12.30%	10.53%	7.14%	0%	0%
	48	3	0	0	3	23	10	9	0	0
	0.37%	0%	0%	0%	2.86%	0%	1.05%	0%	0%	0%

Hailsham	**3**	0	0	0	2	0	1	0	0	0
	2.49%	0%	6.25%	14.29%	1.43%	0%	0%	0%	0%	15.07%
Haywards Heath	**20**	0	2	6	1	0	0	0	0	11
	0.12%	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
Horsham	**1**	0	0	0	0	0	0	1	0	0
	0.37%	0%	0%	0%	1.43%	0%	0%	0.79%	1.56%	0%
Hove	**3**	0	0	0	1	0	0	1	1	0
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Langney Centre	**1**	0	0	0	0	0	1	0	0	0
	13.68%	53.91%	43.75%	7.14%	34.29%	0.53%	3.16%	0.79%	0%	2.74%
Lewes	**110**	62	14	3	24	1	3	1	0	2
	4.35%	0%	3.12%	0%	0%	1.07%	28.42%	2.38%	3.12%	0%
Newhaven	**35**	0	1	0	0	2	27	3	2	0
	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
Newick	**1**	0	0	1	0	0	0	0	0	0
	3.48%	0%	0%	0%	0%	0%	0%	22.22%	0%	0%
Peacehaven (Meridian Centre)	**28**	0	0	0	0	0	0	28	0	0
	0.25%	0%	0%	0%	0%	0%	0%	0.79%	1.56%	0%
Peacehaven (South Coast Road)	**2**	0	0	0	0	0	0	1	1	0
	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
Ringmer	**1**	0	0	0	1	0	0	0	0	0
	11.82%	0.87%	0%	0%	0%	43.85%	9.47%	1.59%	1.56%	0%
Seaford	**95**	1	0	0	0	82	9	2	1	0
	0.12%	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**1**	1	0	0	0	0	0	0	0	0
	0.75%	2.61%	0%	0%	4.29%	0%	0%	0%	0%	0%
Lewes, Tesco	**6**	3	0	0	3	0	0	0	0	0
	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
Eastbourne, Tesco Extra	**1**	0	0	0	0	1	0	0	0	0
	0.25%	0%	0%	4.76%	0%	0%	0%	0%	0%	0%
Tunbridge Wells	**2**	0	0	2	0	0	0	0	0	0
	0.50%	0.87%	0%	4.76%	1.43%	0%	0%	0%	0%	0%
Uckfield	**4**	1	0	2	1	0	0	0	0	0
	23.13%	14.78%	18.75%	45.24%	28.57%	22.46%	24.21%	21.43%	18.75%	27.40%
* Internet	**186**	17	6	19	20	42	23	27	12	20
	2.36%	5.22%	0%	2.38%	5.71%	0.53%	2.11%	1.59%	4.69%	0%
* Catalogue/Mail Order	**19**	6	0	1	4	1	2	2	3	0
	8.33%	6.96%	6.25%	4.76%	8.57%	11.76%	9.47%	7.94%	9.38%	2.74%
* Don't do this type of shopping	**67**	8	2	2	6	22	9	10	6	2
	1.24%	0%	3.12%	4.76%	0%	1.60%	2.11%	0%	1.56%	1.37%
Other	**10**	0	1	2	0	3	2	0	1	1
	0.87%	0%	0%	0%	0%	0%	0%	0%	10.94%	0%
Saltdean	**7**	0	0	0	0	0	0	0	7	0
	0.75%	0%	0%	0%	0%	0%	0%	0%	0%	8.22%
Hassocks	**6**	0	0	0	0	0	0	0	0	6

Q14. Where do you do most of your households shopping for recreation and leisure goods including toys, sports goods, bicycles and accessories, hobbies, jewellery, pets/pet products?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	0.75%	0%	0%	0%	0%	1.60%	3.16%	0%	0%	0%
Eastbourne, Admiral Retail Park	**6**	0	0	0	0	3	3	0	0	0
	0.75%	0%	0%	0%	0%	0%	0%	3.17%	3.12%	0%
Brighton, Asda Brighton Marina	**6**	0	0	0	0	0	0	4	2	0
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Asda Crumbles	**1**	0	0	0	0	0	1	0	0	0
	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
Brighton, Asda Hollingbury	**1**	0	0	0	0	0	0	0	0	1
	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
Bluewater	**1**	0	0	0	0	0	0	0	0	1
	16.79%	11.30%	12.50%	9.52%	15.71%	4.28%	18.95%	30.95%	37.50%	19.18%
Brighton	**135**	13	4	4	11	8	18	39	24	14
	2.36%	0%	9.38%	7.14%	0%	0%	0%	0%	1.56%	16.44%
Burgess Hill	**19**	0	3	3	0	0	0	0	1	12
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
Central London	**1**	0	0	0	0	0	0	0	1	0
	0.50%	0%	0%	7.14%	0%	0%	0%	0%	0%	1.37%
Crawley	**4**	0	0	3	0	0	0	0	0	1
	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
Croydon	**1**	0	0	0	0	1	0	0	0	0
	7.46%	5.22%	0%	0%	5.71%	19.79%	8.42%	3.97%	0%	0%
Eastbourne	**60**	6	0	0	4	37	8	5	0	0
	0.37%	0%	3.12%	0%	2.86%	0%	0%	0%	0%	0%
Hailsham	**3**	0	1	0	2	0	0	0	0	0
	1%	0%	6.25%	4.76%	0%	0%	0%	0%	0%	5.48%
Haywards Heath	**8**	0	2	2	0	0	0	0	0	4
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Horsham	**1**	0	0	0	0	0	1	0	0	0
	0.62%	0.87%	0%	0%	0%	0%	0%	1.59%	1.56%	1.37%
Hove	**5**	1	0	0	0	0	0	2	1	1
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Langney Centre	**1**	0	0	0	0	0	1	0	0	0
	10.45%	34.78%	28.12%	14.29%	27.14%	1.60%	5.26%	0.79%	0%	1.37%
Lewes	**84**	40	9	6	19	3	5	1	0	1
	2.99%	0.87%	0%	0%	1.43%	1.60%	14.74%	3.17%	1.56%	0%
Newhaven	**24**	1	0	0	1	3	14	4	1	0
	0.62%	0%	3.12%	2.38%	0%	0%	0%	1.59%	0%	1.37%
Brighton, Pavillion Retail Park	**5**	0	1	1	0	0	0	2	0	1
	0.12%	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
Peacehaven (Meridian Centre)	**1**	0	0	0	0	0	0	1	0	0
	0.25%	0%	0%	0%	2.86%	0%	0%	0%	0%	0%
Ringmer	**2**	0	0	0	2	0	0	0	0	0
	5.97%	0%	0%	0%	0%	23.53%	3.16%	0.79%	0%	0%
Seaford	**48**	0	0	0	0	44	3	1	0	0
	0.37%	0%	3.12%	0%	0%	0.53%	0%	0%	0%	1.37%
Eastbourne, Sovereign Harbour Retail Park	**3**	0	1	0	0	1	0	0	0	1

Lewes, Tesco	**0.12%**	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
	1	1	0	0	0	0	0	0	0	0
Eastbourne, Tesco Extra	**0.12%**	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Newhaven, The Drove Retail Park	**1%**	0.87%	0%	0%	0%	0%	4.21%	1.59%	1.56%	0%
	8	1	0	0	0	0	4	2	1	0
Uckfield	**0.87%**	0%	0%	9.52%	2.86%	0.53%	0%	0%	0%	0%
	7	0	0	4	2	1	0	0	0	0
* Internet	**12.56%**	6.09%	6.25%	28.57%	10%	10.70%	11.58%	19.05%	17.19%	9.59%
	101	7	2	12	7	20	11	24	11	7
* Catalogue/Mail Order	**2.36%**	7.83%	0%	0%	4.29%	2.67%	0%	0.79%	1.56%	0%
	19	9	0	0	3	5	0	1	1	0
* Don't do this type of shopping	**29.73%**	31.30%	25%	11.90%	25.71%	31.55%	27.37%	30.95%	32.81%	36.99%
	239	36	8	5	18	59	26	39	21	27
Other	**1%**	0%	3.12%	4.76%	1.43%	0.53%	0%	0.79%	0%	2.74%
	8	0	1	2	1	1	0	1	0	2

Q15. Where do you do most of your households shopping for china, glass and home textile goods (china, pottery, glassware, cutlery, cookware, bed linens etc)?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
Eastbourne, Admiral Retail Park	**1.12%**	0%	0%	0%	0%	2.14%	3.16%	1.59%	0%	0%
	9	0	0	0	0	4	3	2	0	0
Brighton, Asda Brighton Marina	**0.87%**	0%	0%	0%	0%	0%	1.05%	3.97%	1.56%	0%
	7	0	0	0	0	0	1	5	1	0
Eastbourne, Asda Crumbles	**0.25%**	0%	0%	0%	0%	0.53%	1.05%	0%	0%	0%
	2	0	0	0	0	1	1	0	0	0
Brighton, Asda Hollingbury	**0.50%**	1.74%	0%	0%	0%	0%	1.05%	0.79%	0%	0%
	4	2	0	0	0	0	1	1	0	0
Bluewater	**0.37%**	0.87%	0%	4.76%	0%	0%	0%	0%	0%	0%
	3	1	0	2	0	0	0	0	0	0
Brighton	**20.77%**	14.78%	18.75%	9.52%	18.57%	4.28%	24.21%	41.27%	46.88%	19.18%
	167	17	6	4	13	8	23	52	30	14
Lewes, Brooks Road Retail Park	**0.25%**	0.87%	0%	0%	0%	0%	0%	0%	1.56%	0%
	2	1	0	0	0	0	0	0	1	0
Burgess Hill	**2.74%**	1.74%	6.25%	7.14%	0%	0%	0%	0%	3.12%	17.81%
	22	2	2	3	0	0	0	0	2	13
Central London	**1.24%**	0%	0%	0%	2.86%	0.53%	0%	2.38%	3.12%	2.74%
	10	0	0	0	2	1	0	3	2	2
Crawley	**1%**	0%	0%	9.52%	0%	0%	0%	0%	0%	5.48%
	8	0	0	4	0	0	0	0	0	4
Croydon	**0.87%**	0.87%	0%	0%	0%	0%	1.05%	2.38%	3.12%	0%
	7	1	0	0	0	0	1	3	2	0
Eastbourne	**14.30%**	5.22%	0%	0%	14.29%	40.11%	13.68%	7.14%	3.12%	0%
	115	6	0	0	10	75	13	9	2	0
Hailsham	**0.12%**	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
	1	0	0	0	1	0	0	0	0	0
Haywards Heath	**0.87%**	0%	3.12%	4.76%	0%	0%	0%	0%	0%	5.48%
	7	0	1	2	0	0	0	0	0	4
Hove	**0.25%**	0%	0%	0%	0%	0%	0%	0.79%	0%	1.37%
	2	0	0	0	0	0	0	1	0	1
Eastbourne, Langney Centre	**0.12%**	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Lewes	**12.19%**	42.61%	31.25%	9.52%	35.71%	2.14%	3.16%	0%	0%	4.11%
	98	49	10	4	25	4	3	0	0	3
Newhaven	**3.48%**	0%	0%	0%	0%	0.53%	23.16%	3.17%	1.56%	0%
	28	0	0	0	0	1	22	4	1	0
Peacehaven (Meridian Centre)	**0.87%**	0%	0%	0%	0%	0%	0%	5.56%	0%	0%
	7	0	0	0	0	0	0	7	0	0
Sevenoaks, Retail Warehousing	**0.12%**	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Ringmer	**0.12%**	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
	1	0	0	0	0	0	1	0	0	0
Seaford	**3.86%**	0%	0%	2.38%	0%	14.44%	2.11%	0.79%	0%	0%
	31	0	0	1	0	27	2	1	0	0
Eastbourne, Sovereign Harbour Retail Park	**0.50%**	0%	3.12%	0%	0%	1.07%	1.05%	0%	0%	0%
	4	0	1	0	0	2	1	0	0	0
Lewes, Tesco	**0.50%**	3.48%	0%	0%	0%	0%	0%	0%	0%	0%
	4	4	0	0	0	0	0	0	0	0
Newhaven, The Drove Retail Park	**0.12%**	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Tunbridge Wells	**0.75%**	0.87%	0%	7.14%	0%	1.07%	0%	0%	0%	0%
	6	1	0	3	0	2	0	0	0	0
Uckfield	**0.75%**	1.74%	0%	4.76%	2.86%	0%	0%	0%	0%	0%
	6	2	0	2	2	0	0	0	0	0
* Internet	**7.21%**	2.61%	15.62%	11.90%	4.29%	8.56%	6.32%	5.56%	6.25%	12.33%
	58	3	5	5	3	16	6	7	4	9
* Catalogue/Mail Order	**2.49%**	5.22%	3.12%	4.76%	2.86%	1.60%	1.05%	3.97%	0%	0%
	20	6	1	2	2	3	1	5	0	0
* Don't do this type of shopping	**18.16%**	16.52%	18.75%	16.67%	12.86%	19.79%	14.74%	14.29%	28.12%	24.66%
	146	19	6	7	9	37	14	18	18	18
Other	**1.74%**	0.87%	0%	4.76%	4.29%	2.14%	2.11%	0.79%	0%	1.37%
	14	1	0	2	3	4	2	1	0	1
Shoreham-by-Sea	**1.49%**	0%	0%	2.38%	0%	0.53%	0%	3.97%	1.56%	5.48%
	12	0	0	1	0	1	0	5	1	4

Q16. Where do you do most of your households shopping for household appliances, such as fridges, washing machines, kettles etc?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
Eastbourne, Admiral Retail Park	**3.86%**	1.74%	0%	0%	2.86%	9.63%	7.37%	1.59%	0%	0%
	31	2	0	0	2	18	7	2	0	0

	0.25%	0%	0%	0%	0%	0%	0%	1.59%	0%	0%
Brighton, Asda Brighton Marina	**2**	0	0	0	0	0	0	2	0	0
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Asda Crumbles	**1**	0	0	0	0	0	1	0	0	0
	0.25%	0%	0%	0%	0%	0%	0%	0.79%	0%	1.37%
Brighton, Asda Hollingbury	**2**	0	0	0	0	0	0	1	0	1
	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
Bluewater	**1**	0	0	0	0	1	0	0	0	0
	15.42%	34.78%	15.62%	4.76%	17.14%	2.67%	13.68%	15.87%	23.44%	16.44%
Brighton	**124**	40	5	2	12	5	13	20	15	12
	0.37%	0.87%	0%	0%	1.43%	0%	0%	0%	1.56%	0%
Lewes, Brooks Road Retail Park	**3**	1	0	0	1	0	0	0	1	0
	3.23%	0%	9.38%	7.14%	0%	0%	1.05%	0%	0%	26.03%
Burgess Hill	**26**	0	3	3	0	0	1	0	0	19
	0.75%	0%	0%	0%	2.86%	0%	0%	0.79%	1.56%	2.74%
Central London	**6**	0	0	0	2	0	0	1	1	2
	0.62%	0%	0%	2.38%	1.43%	0.53%	0%	0%	0%	2.74%
Crawley	**5**	0	0	1	1	1	0	0	0	2
	0.25%	0.87%	0%	0%	0%	0%	0%	0%	1.56%	0%
Croydon	**2**	1	0	0	0	0	0	0	1	0
	9.33%	1.74%	3.12%	0%	7.14%	29.95%	10.53%	0.79%	0%	0%
Eastbourne	**75**	2	1	0	5	56	10	1	0	0
	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
Hailsham	**1**	0	0	0	1	0	0	0	0	0
	1.99%	0%	3.12%	21.43%	0%	0%	0%	0%	0%	8.22%
Haywards Heath	**16**	0	1	9	0	0	0	0	0	6
	0.37%	0%	0%	0%	2.86%	0%	0%	0%	0%	1.37%
Heathfield	**3**	0	0	0	2	0	0	0	0	1
	2.49%	0%	6.25%	0%	0%	0%	0%	8.73%	3.12%	6.85%
Hove	**20**	0	2	0	0	0	0	11	2	5
	0.25%	0%	0%	0%	0%	0.53%	1.05%	0%	0%	0%
Eastbourne, Langney Centre	**2**	0	0	0	0	1	1	0	0	0
	4.10%	11.30%	9.38%	9.52%	11.43%	0%	3.16%	0.79%	0%	1.37%
Lewes	**33**	13	3	4	8	0	3	1	0	1
	1.62%	0.87%	0%	0%	0%	2.14%	8.42%	0%	0%	0%
Newhaven	**13**	1	0	0	0	4	8	0	0	0
	3.23%	4.35%	6.25%	4.76%	2.86%	0.53%	5.26%	3.17%	7.81%	0%
Brighton, Pavillion Retail Park	**26**	5	2	2	2	1	5	4	5	0
	2.11%	0%	3.12%	0%	0%	0.53%	3.16%	7.94%	3.12%	0%
Peacehaven (Meridian Centre)	**17**	0	1	0	0	1	3	10	2	0
	10.95%	6.09%	9.38%	0%	1.43%	5.88%	16.84%	28.57%	21.88%	0%
Peacehaven (South Coast Road)	**88**	7	3	0	1	11	16	36	14	0
	0.25%	0%	0%	2.38%	0%	0.53%	0%	0%	0%	0%
Tunbridge Wells, Retail Warehousing	**2**	0	0	1	0	1	0	0	0	0
	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
Ringmer	**1**	0	0	0	1	0	0	0	0	0
	2.36%	0%	0%	0%	0%	9.63%	0%	0%	1.56%	0%
Seaford	**19**	0	0	0	0	18	0	0	1	0
	1.12%	0.87%	3.12%	0%	2.86%	2.67%	0%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**9**	1	1	0	2	5	0	0	0	0
	0.50%	2.61%	0%	0%	1.43%	0%	0%	0%	0%	0%
Lewes, Tesco	**4**	3	0	0	1	0	0	0	0	0
	0.37%	0%	0%	0%	0%	0%	1.05%	1.59%	0%	0%
Newhaven, The Drove Retail Park	**3**	0	0	0	0	0	1	2	0	0
	0.25%	0%	0%	0%	1.43%	0%	1.05%	0%	0%	0%
Tunbridge Wells	**2**	0	0	0	1	0	1	0	0	0
	0.62%	1.74%	0%	4.76%	1.43%	0%	0%	0%	0%	0%
Uckfield	**5**	2	0	2	1	0	0	0	0	0
	21.52%	20%	31.25%	38.10%	21.43%	20.32%	17.89%	18.25%	25%	20.55%
* Internet	**173**	23	10	16	15	38	17	23	16	15
	3.48%	6.96%	0%	0%	8.57%	2.14%	2.11%	3.17%	4.69%	1.37%
* Catalogue/Mail Order	**28**	8	0	0	6	4	2	4	3	1
	4.98%	4.35%	0%	2.38%	4.29%	4.81%	6.32%	4.76%	4.69%	9.59%
* Don't do this type of shopping	**40**	5	0	1	3	9	6	6	3	7
	0.75%	0.87%	0%	2.38%	1.43%	0.53%	0%	0.79%	0%	1.37%
Other	**6**	1	0	1	1	1	0	1	0	1
	1.87%	0%	0%	0%	2.86%	6.42%	0%	0.79%	0%	0%
Eastbourne - Hampden Retail Park (behind hospital)	**15**	0	0	0	2	12	0	1	0	0

Q17. Where do you do most of your households shopping for audio-visual equipment such as TVs DVD players, HiFi, cameras, computers etc?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	4.48%	0.87%	3.12%	2.38%	4.29%	11.76%	6.32%	0.79%	1.56%	0%
Eastbourne, Admiral Retail Park	**36**	1	1	1	3	22	6	1	1	0
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Asda Crumbles	**1**	0	0	0	0	0	1	0	0	0
	17.41%	31.30%	18.75%	7.14%	11.43%	3.21%	13.68%	26.19%	29.69%	21.92%
Brighton	**140**	36	6	3	8	6	13	33	19	16
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
Lewes, Brooks Road Retail Park	**1**	0	0	0	0	0	0	0	1	0
	1.99%	0%	6.25%	2.38%	0%	0%	1.05%	0%	0%	16.44%
Burgess Hill	**16**	0	2	1	0	0	1	0	0	12
	0.75%	0%	0%	0%	2.86%	0%	0%	0.79%	3.12%	1.37%
Central London	**6**	0	0	0	2	0	0	1	2	1
	0.87%	0%	0%	7.14%	1.43%	0%	0%	0%	0%	4.11%
Crawley	**7**	0	0	3	1	0	0	0	0	3
	0.12%	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
Croydon	**1**	0	0	0	0	0	0	0	0	1
	8.83%	2.61%	0%	0%	7.14%	27.27%	10.53%	1.59%	0%	0%
Eastbourne	**71**	3	0	0	5	51	10	2	0	0
	1.12%	0%	3.12%	11.90%	0%	0%	0%	0%	0%	4.11%
Haywards Heath	**9**	0	1	5	0	0	0	0	0	3
	3.86%	0.87%	3.12%	0%	0%	0.53%	2.11%	12.70%	9.38%	5.48%
Hove	**31**	1	1	0	0	1	2	16	6	4
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Langney Centre	**1**	0	0	0	0	0	1	0	0	0

	4.35%	14.78%	6.25%	4.76%	14.29%	0%	4.21%	0%	0%	0%
Lewes	**35**	17	2	2	10	0	4	0	0	0
	0.75%	0%	0%	0%	0%	0.53%	5.26%	0%	0%	0%
Newhaven	**6**	0	0	0	0	1	5	0	0	0
	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
Newick	**1**	0	0	1	0	0	0	0	0	0
	4.10%	4.35%	12.50%	2.38%	1.43%	0.53%	8.42%	5.56%	6.25%	2.74%
Brighton, Pavillion Retail Park	**33**	5	4	1	1	1	8	7	4	2
	0.75%	0%	0%	0%	0%	0%	1.05%	3.97%	0%	0%
Peacehaven (Meridian Centre)	**6**	0	0	0	0	0	1	5	0	0
	0.50%	0.87%	0%	0%	0%	0%	0%	2.38%	0%	0%
Peacehaven (South Coast Road)	**4**	1	0	0	0	0	0	3	0	0
	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
Tunbridge Wells, Retail Warehousing	**1**	0	0	1	0	0	0	0	0	0
	1.99%	0.87%	0%	0%	0%	4.81%	3.16%	0.79%	3.12%	0%
Seaford	**16**	1	0	0	0	9	3	1	2	0
	1.12%	0.87%	0%	0%	2.86%	3.21%	0%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**9**	1	0	0	2	6	0	0	0	0
	0.37%	0%	0%	0%	0%	1.07%	1.05%	0%	0%	0%
Eastbourne, Tesco Extra	**3**	0	0	0	0	2	1	0	0	0
	0.12%	0%	0%	0%	0%	0%	0%	0.79%	0%	0%
Newhaven, The Drove Retail Park	**1**	0	0	0	0	0	0	1	0	0
	0.37%	0.87%	0%	2.38%	1.43%	0%	0%	0%	0%	0%
Tunbridge Wells	**3**	1	0	1	1	0	0	0	0	0
	0.25%	0.87%	0%	2.38%	0%	0%	0%	0%	0%	0%
Uckfield	**2**	1	0	1	0	0	0	0	0	0
	26.12%	22.61%	43.75%	45.24%	28.57%	22.46%	22.11%	25.40%	21.88%	30.14%
* Internet	**210**	26	14	19	20	42	21	32	14	22
	4.23%	8.70%	0%	0%	12.86%	1.60%	3.16%	3.17%	6.25%	1.37%
* Catalogue/Mail Order	**34**	10	0	0	9	3	3	4	4	1
	11.32%	8.70%	3.12%	4.76%	7.14%	14.44%	13.68%	13.49%	15.62%	8.22%
* Don't do this type of shopping	**91**	10	1	2	5	27	13	17	10	6
	1.37%	0.87%	0%	2.38%	0%	1.07%	2.11%	1.59%	1.56%	2.74%
Other	**11**	1	0	1	0	2	2	2	1	2
	1.87%	0%	0%	0%	2.86%	6.95%	0%	0%	0%	0%
Eastbourne - Hampden Retail Park (behind hospital)	**15**	0	0	0	2	13	0	0	0	0
	0.37%	0%	0%	0%	1.43%	0.53%	0%	0.79%	0%	0%
Bexhill	**3**	0	0	0	1	1	0	1	0	0

Q18. Where do you do most of your households shopping for furniture, soft furnishings and carpets?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	1.99%	0.87%	0%	0%	2.86%	3.74%	4.21%	1.59%	0%	0%
Eastbourne, Admiral Retail Park	**16**	1	0	0	2	7	4	2	0	0
	0.12%	0%	0%	0%	0%	0%	1.05%	0%	0%	0%
Eastbourne, Asda Crumbles	**1**	0	0	0	0	0	1	0	0	0
	0.50%	0%	0%	2.38%	1.43%	0.53%	0%	0%	0%	1.37%
Bluewater	**4**	0	0	1	1	1	0	0	0	1
	14.68%	22.61%	18.75%	2.38%	7.14%	7.49%	10.53%	12.70%	29.69%	28.77%
Brighton	**118**	26	6	1	5	14	10	16	19	21
	0.62%	2.61%	3.12%	0%	0%	0.53%	0%	0%	0%	0%
Lewes, Brooks Road Retail Park	**5**	3	1	0	0	1	0	0	0	0
	1.99%	0%	12.50%	4.76%	0%	0%	0%	0%	0%	13.70%
Burgess Hill	**16**	0	4	2	0	0	0	0	0	10
	0.87%	0.87%	0%	0%	1.43%	1.07%	0%	0%	3.12%	1.37%
Central London	**7**	1	0	0	1	2	0	0	2	1
	0.75%	0%	3.12%	4.76%	1.43%	0%	0%	0%	0%	2.74%
Crawley	**6**	0	1	2	1	0	0	0	0	2
	1.87%	3.48%	3.12%	2.38%	2.86%	0%	1.05%	3.17%	0%	2.74%
Croydon	**15**	4	1	1	2	0	1	4	0	2
	5.47%	2.61%	0%	0%	7.14%	14.44%	5.26%	2.38%	1.56%	0%
Eastbourne	**44**	3	0	0	5	27	5	3	1	0
	0.12%	0%	0%	0%	0%	0.53%	0%	0%	0%	0%
Hailsham	**1**	0	0	0	0	1	0	0	0	0
	1%	0%	0%	14.29%	0%	0%	0%	0%	0%	2.74%
Haywards Heath	**8**	0	0	6	0	0	0	0	0	2
	3.11%	0.87%	0%	2.38%	0%	2.14%	0%	10.32%	4.69%	4.11%
Hove	**25**	1	0	1	0	4	0	13	3	3
	0.12%	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
Eastbourne, Langney Centre	**1**	1	0	0	0	0	0	0	0	0
	8.83%	33.91%	15.62%	4.76%	21.43%	1.60%	3.16%	1.59%	0%	2.74%
Lewes	**71**	39	5	2	15	3	3	2	0	2
	5.22%	0%	0%	0%	2.86%	4.81%	25.26%	3.97%	3.12%	0%
Newhaven	**42**	0	0	0	2	9	24	5	2	0
	0.12%	0%	0%	2.38%	0%	0%	0%	0%	0%	0%
Newick	**1**	0	0	1	0	0	0	0	0	0
	2.61%	1.74%	6.25%	4.76%	4.29%	1.07%	4.21%	3.17%	3.12%	0%
Brighton, Pavillion Retail Park	**21**	2	2	2	3	2	4	4	2	0
	0.75%	0%	0%	0%	0%	0.53%	0%	3.97%	0%	0%
Peacehaven (Meridian Centre)	**6**	0	0	0	0	1	0	5	0	0
	2.99%	0%	0%	0%	0%	0.53%	1.05%	14.29%	6.25%	0%
Peacehaven (South Coast Road)	**24**	0	0	0	0	1	1	18	4	0
	0.12%	0%	0%	0%	1.43%	0%	0%	0%	0%	0%
Ringmer	**1**	0	0	0	1	0	0	0	0	0
	7.21%	0%	0%	0%	0%	26.20%	6.32%	1.59%	1.56%	0%
Seaford	**58**	0	0	0	0	49	6	2	1	0
	0.62%	0%	3.12%	0%	1.43%	1.60%	0%	0%	0%	0%
Eastbourne, Sovereign Harbour Retail Park	**5**	0	1	0	1	3	0	0	0	0
	2.99%	1.74%	3.12%	0%	1.43%	1.60%	5.26%	7.14%	4.69%	0%
Newhaven, The Drove Retail Park	**24**	2	1	0	1	3	5	9	3	0
	1.24%	0%	3.12%	11.90%	2.86%	0.53%	0%	0%	0%	1.37%
Tunbridge Wells	**10**	0	1	5	2	1	0	0	0	1
	1.37%	0%	0%	11.90%	5.71%	0.53%	0%	0.79%	0%	0%
Uckfield	**11**	0	0	5	4	1	0	1	0	0
	7.34%	4.35%	12.50%	14.29%	10%	4.28%	8.42%	8.73%	4.69%	9.59%
* Internet	**59**	5	4	6	7	8	8	11	3	7

	2.36%	5.22%	0%	4.76%	2.86%	1.60%	2.11%	1.59%	0%	2.74%
* Catalogue/Mail Order	**19**	6	0	2	2	3	2	2	0	2
	21.27%	18.26%	15.62%	7.14%	18.57%	24.06%	21.05%	18.25%	34.38%	26.03%
* Don't do this type of shopping	**171**	21	5	3	13	45	20	23	22	19
	1%	0%	0%	4.76%	2.86%	0.53%	1.05%	1.59%	0%	0%
Other	**8**	0	0	2	2	1	1	2	0	0
	0.75%	0%	0%	0%	0%	0%	0%	3.17%	3.12%	0%
Shoreham-by-Sea	**6**	0	0	0	0	0	0	4	2	0

Q19. Where do you do most of your households shopping for Do-it-Yourself goods, decorating supplies and garden products?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	0.37%	0%	0%	0%	0%	1.60%	0%	0%	0%	0%
Eastbourne, Admiral Retail Park	**3**	0	0	0	0	3	0	0	0	0
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
Brighton, Asda Brighton Marina	**1**	0	0	0	0	0	0	0	1	0
	3.73%	3.48%	6.25%	0%	0%	0%	0%	1.59%	26.56%	6.85%
Brighton	**30**	4	2	0	0	0	0	2	17	5
	1.87%	7.83%	3.12%	4.76%	1.43%	0%	1.05%	0.79%	0%	0%
Lewes, Brooks Road Retail Park	**15**	9	1	2	1	0	1	1	0	0
	5.60%	0%	15.62%	19.05%	0%	0%	0%	0%	0%	43.84%
Burgess Hill	**45**	0	5	8	0	0	0	0	0	32
	0.12%	0.87%	0%	0%	0%	0%	0%	0%	0%	0%
Central London	**1**	1	0	0	0	0	0	0	0	0
	0.37%	0%	0%	4.76%	0%	0%	0%	0%	0%	1.37%
Crawley	**3**	0	0	2	0	0	0	0	0	1
	1.62%	0.87%	0%	0%	2.86%	4.28%	1.05%	0.79%	0%	0%
Eastbourne	**13**	1	0	0	2	8	1	1	0	0
	1%	0.87%	0%	0%	8.57%	0.53%	0%	0%	0%	0%
Hailsham	**8**	1	0	0	6	1	0	0	0	0
	0.75%	0%	0%	2.38%	0%	0%	0%	0%	0%	6.85%
Haywards Heath	**6**	0	0	1	0	0	0	0	0	5
	0.25%	0%	0%	0%	1.43%	0%	0%	0%	0%	1.37%
Heathfield	**2**	0	0	0	1	0	0	0	0	1
	0.87%	0%	0%	0%	1.43%	0%	0%	0.79%	3.12%	4.11%
Hove	**7**	0	0	0	1	0	0	1	2	3
	14.05%	53.04%	28.12%	11.90%	50%	0%	1.05%	0%	0%	2.74%
Lewes	**113**	61	9	5	35	0	1	0	0	2
	15.55%	1.74%	9.38%	0%	2.86%	23.53%	50.53%	16.67%	7.81%	0%
Newhaven	**125**	2	3	0	2	44	48	21	5	0
	0.50%	0%	0%	0%	0%	0%	0%	2.38%	1.56%	0%
Brighton, Pavillion Retail Park	**4**	0	0	0	0	0	0	3	1	0
	0.37%	0%	0%	0%	0%	0%	0%	2.38%	0%	0%
Peacehaven (Meridian Centre)	**3**	0	0	0	0	0	0	3	0	0
	0.50%	0%	0%	0%	5.71%	0%	0%	0%	0%	0%
Ringmer	**4**	0	0	0	4	0	0	0	0	0
	5.60%	0%	0%	0%	0%	22.46%	1.05%	0.79%	1.56%	0%
Seaford	**45**	0	0	0	0	42	1	1	1	0
	14.43%	1.74%	0%	0%	4.29%	13.37%	28.42%	33.33%	26.56%	0%
Newhaven, The Drove Retail Park	**116**	2	0	0	3	25	27	42	17	0
	1.62%	0.87%	0%	26.19%	1.43%	0%	0%	0%	0%	0%
Uckfield	**13**	1	0	11	1	0	0	0	0	0
	1.37%	2.61%	3.12%	0%	1.43%	1.07%	0%	2.38%	1.56%	0%
* Internet	**11**	3	1	0	1	2	0	3	1	0
	1.24%	0.87%	0%	2.38%	1.43%	0%	1.05%	2.38%	4.69%	0%
* Catalogue/Mail Order	**10**	1	0	1	1	0	1	3	3	0
	10.95%	10.43%	6.25%	9.52%	4.29%	13.37%	6.32%	12.70%	17.19%	12.33%
* Don't do this type of shopping	**88**	12	2	4	3	25	6	16	11	9
	1.12%	0%	3.12%	0%	2.86%	0.53%	0%	0%	4.69%	2.74%
Other	**9**	0	1	0	2	1	0	0	3	2
	1.49%	5.22%	3.12%	0%	2.86%	0.53%	1.05%	0.79%	0%	0%
Kingston near Lewes	**12**	6	1	0	2	1	1	1	0	0
	2.74%	9.57%	0%	9.52%	7.14%	0%	0%	0%	0%	2.74%
Homebase, Lewes	**22**	11	0	4	5	0	0	0	0	2
	1%	0%	9.38%	9.52%	0%	0%	0%	0%	0%	1.37%
Ditchling	**8**	0	3	4	0	0	0	0	0	1
	1.37%	0%	3.12%	0%	0%	0%	0%	0%	0%	13.70%
Hassocks	**11**	0	1	0	0	0	0	0	0	10
	9.45%	0%	9.38%	0%	0%	18.72%	8.42%	22.22%	3.12%	0%
B&Q, Newhaven	**76**	0	3	0	0	35	8	28	2	0

Q20. How do you normally travel to do your non food shopping?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	67.79%	53.91%	78.12%	78.57%	81.43%	67.38%	58.95%	66.67%	60.94%	86.30%
Car (own / company)	**545**	62	25	33	57	126	56	84	39	63
	9.58%	11.30%	15.62%	16.67%	2.86%	9.63%	8.42%	11.90%	7.81%	5.48%
Car (passenger in friends / relatives car)	**77**	13	5	7	2	18	8	15	5	4
	0.37%	1.74%	0%	0%	0%	0.53%	0%	0%	0%	0%
Motorcycle / moped	**3**	2	0	0	0	1	0	0	0	0
	14.93%	13.91%	0%	4.76%	11.43%	13.90%	25.26%	16.67%	29.69%	5.48%
Bus	**120**	16	0	2	8	26	24	21	19	4
	1.62%	6.96%	0%	0%	1.43%	1.60%	0%	0%	0%	1.37%
Train/Rail	**13**	8	0	0	1	3	0	0	0	1
	3.86%	9.57%	6.25%	0%	1.43%	3.74%	5.26%	2.38%	1.56%	1.37%
Walk	**31**	11	2	0	1	7	5	3	1	1
	0.50%	0%	0%	0%	0%	1.60%	0%	0.79%	0%	0%
Taxi	**4**	0	0	0	0	3	0	1	0	0
	0.50%	1.74%	0%	0%	0%	1.07%	0%	0%	0%	0%
Bicycle	**4**	2	0	0	0	2	0	0	0	0
	0.62%	0.87%	0%	0%	1.43%	0.53%	1.05%	0.79%	0%	0%
* Internet / Home Delivery	**5**	1	0	0	1	1	1	1	0	0

	0.25%	0%	0%	0%	0%	0%	1.05%	0.79%	0%	0%
Other	**2**	0	0	0	0	0	1	1	0	0

Q21a. Lewes
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	5.10%	23.48%	9.38%	2.38%	7.14%	0%	2.11%	0.79%	0%	2.74%
Daily	**41**	27	3	1	5	0	2	1	0	2
	13.18%	51.30%	31.25%	9.52%	40%	0.53%	3.16%	0%	0%	1.37%
2 to 3 time per week	**106**	59	10	4	28	1	3	0	0	1
	11.07%	17.39%	25%	23.81%	30%	5.88%	8.42%	4.76%	1.56%	5.48%
Weekly	**89**	20	8	10	21	11	8	6	1	4
	5.47%	4.35%	6.25%	14.29%	8.57%	2.14%	8.42%	3.97%	4.69%	6.85%
Fortnightly	**44**	5	2	6	6	4	8	5	3	5
	10.95%	1.74%	12.50%	16.67%	4.29%	13.37%	16.84%	11.11%	12.50%	12.33%
Monthly	**88**	2	4	7	3	25	16	14	8	9
	27.74%	0.87%	15.62%	21.43%	4.29%	35.29%	34.74%	34.92%	54.69%	36.99%
Less often/infrequently	**223**	1	5	9	3	66	33	44	35	27
	26.49%	0.87%	0%	11.90%	5.71%	42.78%	26.32%	44.44%	26.56%	34.25%
Don't visit	**213**	1	0	5	4	80	25	56	17	25

Q21b. Newhaven
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	3.98%	0%	6.25%	0%	0%	0%	29.47%	0.79%	1.56%	0%
Daily	**32**	0	2	0	0	0	28	1	1	0
	4.23%	1.74%	0%	0%	0%	3.74%	21.05%	3.17%	1.56%	0%
2 to 3 time per week	**34**	2	0	0	0	7	20	4	1	0
	10.57%	2.61%	18.75%	0%	5.71%	14.44%	21.05%	17.46%	4.69%	0%
Weekly	**85**	3	6	0	4	27	20	22	3	0
	4.23%	1.74%	0%	0%	0%	5.88%	7.37%	9.52%	3.12%	0%
Fortnightly	**34**	2	0	0	0	11	7	12	2	0
	8.83%	2.61%	3.12%	7.14%	7.14%	11.23%	8.42%	15.08%	17.19%	0%
Monthly	**71**	3	1	3	5	21	8	19	11	0
	14.30%	15.65%	12.50%	11.90%	15.71%	16.58%	6.32%	19.05%	20.31%	4.11%
Less often/infrequently	**115**	18	4	5	11	31	6	24	13	3
	53.86%	75.65%	59.38%	80.95%	71.43%	48.13%	6.32%	34.92%	51.56%	95.89%
Don't visit	**433**	87	19	34	50	90	6	44	33	70

Q21c. Peacehaven (Meridian Centre)
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	1.37%	0%	0%	0%	0%	0%	0%	8.73%	0%	0%
Daily	**11**	0	0	0	0	0	0	11	0	0
	4.85%	0%	0%	0%	0%	0%	3.16%	28.57%	0%	0%
2 to 3 time per week	**39**	0	0	0	0	0	3	36	0	0
	7.09%	0.87%	0%	0%	0%	2.14%	3.16%	35.71%	6.25%	0%
Weekly	**57**	1	0	0	0	4	3	45	4	0
	1.74%	0%	0%	0%	0%	0%	2.11%	6.35%	6.25%	0%
Fortnightly	**14**	0	0	0	0	0	2	8	4	0
	3.23%	0%	0%	0%	0%	1.60%	9.47%	6.35%	9.38%	0%
Monthly	**26**	0	0	0	0	3	9	8	6	0
	9.58%	2.61%	6.25%	7.14%	4.29%	11.23%	14.74%	7.94%	31.25%	1.37%
Less often/infrequently	**77**	3	2	3	3	21	14	10	20	1
	72.14%	96.52%	93.75%	92.86%	95.71%	85.03%	67.37%	6.35%	46.88%	98.63%
Don't visit	**580**	111	30	39	67	159	64	8	30	72

Q21d. Peacehaven (South Coast Road Area)
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	1.99%	0%	0%	0%	0%	0%	1.05%	11.90%	0%	0%
Daily	**16**	0	0	0	0	0	1	15	0	0
	1.87%	0%	0%	0%	0%	0%	1.05%	11.11%	0%	0%
2 to 3 time per week	**15**	0	0	0	0	0	1	14	0	0
	2.74%	0%	0%	0%	0%	0%	1.05%	15.08%	3.12%	0%
Weekly	**22**	0	0	0	0	0	1	19	2	0
	1.99%	0%	0%	0%	1.43%	0%	2.11%	8.73%	3.12%	0%
Fortnightly	**16**	0	0	0	1	0	2	11	2	0
	3.36%	0.87%	0%	0%	0%	0.53%	7.37%	11.90%	4.69%	0%
Monthly	**27**	1	0	0	0	1	7	15	3	0
	13.06%	7.83%	12.50%	7.14%	4.29%	13.90%	20%	16.67%	31.25%	0%
Less often/infrequently	**105**	9	4	3	3	26	19	21	20	0
	75%	91.30%	87.50%	92.86%	94.29%	85.56%	67.37%	24.60%	57.81%	100%
Don't visit	**603**	105	28	39	66	160	64	31	37	73

Q21e. Seaford
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	6.09%	0%	3.12%	0%	0%	22.99%	4.21%	0.79%	0%	0%
Daily	**49**	0	1	0	0	43	4	1	0	0
	12.81%	0.87%	0%	2.38%	1.43%	47.59%	8.42%	2.38%	0%	0%

2 to 3 time per week	**103**	1	0	1	1	89	8	3	0	0
	9.33%	0.87%	6.25%	0%	1.43%	23.53%	15.79%	7.94%	3.12%	0%
Weekly	**75**	1	2	0	1	44	15	10	2	0
	4.35%	2.61%	0%	0%	2.86%	3.21%	14.74%	3.97%	7.81%	0%
Fortnightly	**35**	3	0	0	2	6	14	5	5	0
	8.33%	6.09%	3.12%	2.38%	8.57%	1.07%	25.26%	15.87%	9.38%	0%
Monthly	**67**	7	1	1	6	2	24	20	6	0
	15.67%	22.61%	15.62%	30.95%	18.57%	0.53%	21.05%	26.98%	17.19%	4.11%
Less often/infrequently	**126**	26	5	13	13	1	20	34	11	3
	43.41%	66.96%	71.88%	64.29%	67.14%	1.07%	10.53%	42.06%	62.50%	95.89%
Don't visit	**349**	77	23	27	47	2	10	53	40	70

Q21f. Ringmer
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	1.99%	0.87%	0%	0%	20%	0.53%	0%	0%	0%	0%
Daily	**16**	1	0	0	14	1	0	0	0	0
	1.74%	0%	0%	0%	20%	0%	0%	0%	0%	0%
2 to 3 time per week	**14**	0	0	0	14	0	0	0	0	0
	2.24%	2.61%	6.25%	0%	18.57%	0%	0%	0%	0%	0%
Weekly	**18**	3	2	0	13	0	0	0	0	0
	0.62%	0.87%	0%	0%	4.29%	0.53%	0%	0%	0%	0%
Fortnightly	**5**	1	0	0	3	1	0	0	0	0
	2.11%	4.35%	0%	2.38%	10%	0.53%	2.11%	0.79%	0%	0%
Monthly	**17**	5	0	1	7	1	2	1	0	0
	7.46%	23.48%	6.25%	19.05%	15.71%	2.67%	1.05%	1.59%	6.25%	0%
Less often/infrequently	**60**	27	2	8	11	5	1	2	4	0
	83.83%	67.83%	87.50%	78.57%	11.43%	95.72%	96.84%	97.62%	93.75%	100%
Don't visit	**674**	78	28	33	8	179	92	123	60	73

Q22. What do you do on your trips to Lewes?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	1291	**438**	**74**	**85**	**144**	**164**	**109**	**110**	**83**	**84**
	21.22%	21%	31.08%	21.18%	33.33%	19.51%	14.68%	18.18%	10.84%	19.05%
Food shopping	**274**	92	23	18	48	32	16	20	9	16
	25.02%	16.44%	21.62%	29.41%	27.08%	31.71%	34.86%	31.82%	26.51%	28.57%
Non food shopping	**323**	72	16	25	39	52	38	35	22	24
	7.67%	12.56%	8.11%	5.88%	11.81%	1.22%	5.50%	4.55%	2.41%	1.19%
Bank/building soc	**99**	55	6	5	17	2	6	5	2	1
	2.79%	5.25%	1.35%	1.18%	1.39%	1.83%	1.83%	1.82%	1.20%	1.19%
Dry Cleaners/ Hairdressers/ other services	**36**	23	1	1	2	3	2	2	1	1
	3.33%	7.99%	1.35%	2.35%	2.78%	0%	0.92%	0%	0%	0%
Post Office	**43**	35	1	2	4	0	1	0	0	0
	9.45%	9.36%	6.76%	9.41%	4.17%	12.20%	6.42%	8.18%	21.69%	9.52%
Restaurant/pubs/	**122**	41	5	8	6	20	7	9	18	8
	8.52%	7.99%	6.76%	9.41%	8.33%	7.32%	7.34%	10.91%	12.05%	9.52%
Other leisure	**110**	35	5	8	12	12	8	12	10	8
	1.63%	2.05%	2.70%	2.35%	0.69%	3.05%	0%	0%	1.20%	1.19%
Market (including Farmers)	**21**	9	2	2	1	5	0	0	1	1
	6.20%	5.94%	5.41%	2.35%	2.08%	7.93%	10.09%	8.18%	8.43%	5.95%
Visiting friends/relatives	**80**	26	4	2	3	13	11	9	7	5
	0.39%	0.46%	0%	0%	1.39%	0.61%	0%	0%	0%	0%
Church	**5**	2	0	0	2	1	0	0	0	0
	1.16%	1.83%	1.35%	3.53%	0.69%	0%	1.83%	0%	0%	0%
Train station	**15**	8	1	3	1	0	2	0	0	0
	0.85%	1.37%	0%	0%	1.39%	0.61%	0%	0%	0%	2.38%
School run	**11**	6	0	0	2	1	0	0	0	2
	0.08%	0%	0%	0%	0%	0%	0.92%	0%	0%	0%
Other	**1**	0	0	0	0	0	1	0	0	0
	2.87%	2.28%	6.76%	4.71%	2.08%	3.05%	2.75%	2.73%	0%	4.76%
Work/ business	**37**	10	5	4	3	5	3	3	0	4
	7.44%	3.88%	4.05%	8.24%	0%	10.37%	11.01%	13.64%	15.66%	14.29%
Browsing	**96**	17	3	7	0	17	12	15	13	12
	1.39%	1.60%	2.70%	0%	2.78%	0.61%	1.83%	0%	0%	2.38%
Doctor/ dentist	**18**	7	2	0	4	1	2	0	0	2

Q23. What improvements would make you visit Lewes more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	753	**142**	**56**	**56**	**90**	**137**	**73**	**86**	**52**	**61**
	3.45%	4.93%	0%	1.79%	6.67%	0%	1.37%	5.81%	7.69%	3.28%
More/better food shopping	**26**	7	0	1	6	0	1	5	4	2
	0.66%	1.41%	0%	1.79%	0%	0%	1.37%	1.16%	0%	0%
More/better Non food shopping	**5**	2	0	1	0	0	1	1	0	0
	24.97%	19.01%	28.57%	33.93%	30%	22.63%	19.18%	16.28%	21.15%	47.54%
More/better car parking (incl less traffic wardens)	**188**	27	16	19	27	31	14	14	11	29
	3.85%	2.82%	1.79%	3.57%	7.78%	3.65%	1.37%	3.49%	7.69%	3.28%
National multiples	**29**	4	1	2	7	5	1	3	4	2
	0.66%	0%	1.79%	0%	1.11%	1.46%	0%	1.16%	0%	0%
Improved restaurant/pub offer	**5**	0	1	0	1	2	0	1	0	0
	0.66%	2.11%	0%	0%	0%	1.46%	0%	0%	0%	0%
More leisure uses	**5**	3	0	0	0	2	0	0	0	0
	1.86%	3.52%	0%	0%	2.22%	2.19%	1.37%	2.33%	0%	1.64%
Better environmental quality	**14**	5	0	0	2	3	1	2	0	1
	29.35%	23.24%	5.36%	7.14%	14.44%	38.69%	56.16%	40.70%	50%	21.31%
* No change/good	**221**	33	3	4	13	53	41	35	26	13
	1.06%	0.70%	3.57%	1.79%	0%	0.73%	0%	2.33%	1.92%	0%
Other	**8**	1	2	1	0	1	0	2	1	0
	15.27%	16.90%	26.79%	26.79%	18.89%	18.98%	4.11%	11.63%	1.92%	6.56%
Cheaper parking	**115**	24	15	15	17	26	3	10	1	4

Better bus services/ public transport provision.	**3.59%**	2.82%	8.93%	5.36%	3.33%	2.19%	5.48%	1.16%	1.92%	4.92%
	27	4	5	3	3	3	4	1	1	3
Better/ more bike lanes	**0.53%**	2.11%	0%	0%	1.11%	0%	0%	0%	0%	0%
	4	3	0	0	1	0	0	0	0	0
Less traffic/ improved traffic conditions	**2.92%**	3.52%	8.93%	3.57%	1.11%	0.73%	0%	3.49%	0%	8.20%
	22	5	5	2	1	1	0	3	0	5
More clothes stores	**4.52%**	6.34%	1.79%	1.79%	2.22%	2.92%	6.85%	9.30%	5.77%	1.64%
	34	9	1	1	2	4	5	8	3	1
Marks & Spencer	**1.06%**	1.41%	0%	3.57%	1.11%	1.46%	0%	0%	1.92%	0%
	8	2	0	2	1	2	0	0	1	0
Post office	**0.93%**	1.41%	5.36%	0%	1.11%	0%	0%	0%	0%	1.64%
	7	2	3	0	1	0	0	0	0	1
Electrical stores	**1.20%**	2.11%	1.79%	1.79%	1.11%	0.73%	2.74%	0%	0%	0%
	9	3	1	1	1	1	2	0	0	0
More Independent non food stores	**1.46%**	2.11%	1.79%	3.57%	3.33%	1.46%	0%	0%	0%	0%
	11	3	1	2	3	2	0	0	0	0
Cheaper shops in general	**1.20%**	2.11%	1.79%	1.79%	4.44%	0%	0%	0%	0%	0%
	9	3	1	1	4	0	0	0	0	0
Homewares stores	**0.40%**	0%	1.79%	1.79%	0%	0%	0%	1.16%	0%	0%
	3	0	1	1	0	0	0	1	0	0
Cinema	**0.40%**	1.41%	0%	0%	0%	0.73%	0%	0%	0%	0%
	3	2	0	0	0	1	0	0	0	0

Q24. What do you do on your trips to Newhaven?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	627	**41**	**19**	**10**	**23**	**148**	**203**	**127**	**53**	**3**
Food shopping	**29.19%**	17.07%	36.84%	0%	34.78%	32.43%	25.62%	32.28%	35.85%	33.33%
	183	7	7	0	8	48	52	41	19	1
Non food shopping	**29.98%**	26.83%	21.05%	30%	39.13%	37.16%	20.69%	36.22%	32.08%	33.33%
	188	11	4	3	9	55	42	46	17	1
Bank/building soc	**5.42%**	4.88%	0%	0%	0%	2.03%	10.84%	3.94%	3.77%	0%
	34	2	0	0	0	3	22	5	2	0
Dry Cleaners/ Hairdressers/ other services	**3.19%**	4.88%	5.26%	0%	0%	1.35%	3.45%	2.36%	9.43%	0%
	20	2	1	0	0	2	7	3	5	0
Post Office	**4.63%**	2.44%	0%	0%	0%	0%	13.30%	0.79%	0%	0%
	29	1	0	0	0	0	27	1	0	0
Restaurant/pubs/	**3.03%**	4.88%	0%	10%	0%	3.38%	3.45%	2.36%	1.89%	0%
	19	2	0	1	0	5	7	3	1	0
Other leisure	**8.45%**	14.63%	15.79%	20%	13.04%	7.43%	6.40%	7.09%	9.43%	33.33%
	53	6	3	2	3	11	13	9	5	1
Market (including Farmers)	**0.80%**	0%	0%	0%	0%	0.68%	1.48%	0.79%	0%	0%
	5	0	0	0	0	1	3	1	0	0
Visiting friends/relatives	**6.70%**	21.95%	5.26%	30%	8.70%	7.43%	4.43%	4.72%	1.89%	0%
	42	9	1	3	2	11	9	6	1	0
Train station	**0.48%**	0%	0%	0%	0%	0%	1.48%	0%	0%	0%
	3	0	0	0	0	0	3	0	0	0
School run	**0.16%**	0%	0%	0%	0%	0%	0.49%	0%	0%	0%
	1	0	0	0	0	0	1	0	0	0
Work/ business	**2.07%**	0%	10.53%	0%	4.35%	2.03%	1.48%	1.57%	3.77%	0%
	13	0	2	0	1	3	3	2	2	0
Browsing	**3.83%**	2.44%	5.26%	10%	0%	4.73%	2.96%	5.51%	1.89%	0%
	24	1	1	1	0	7	6	7	1	0
Doctor/ dentist	**2.07%**	0%	0%	0%	0%	1.35%	3.94%	2.36%	0%	0%
	13	0	0	0	0	2	8	3	0	0

Q25. What improvements would make you visit Newhaven more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	620	**33**	**18**	**10**	**25**	**153**	**172**	**162**	**44**	**3**
More/better food shopping	**15.32%**	9.09%	0%	0%	16%	12.42%	23.84%	14.20%	11.36%	0%
	95	3	0	0	4	19	41	23	5	0
More/better Non food shopping	**2.10%**	6.06%	5.56%	0%	4%	1.31%	1.16%	3.09%	0%	0%
	13	2	1	0	1	2	2	5	0	0
More/better car parking (incl less traffic wardens)	**3.23%**	3.03%	0%	0%	8%	1.96%	4.65%	3.09%	2.27%	0%
	20	1	0	0	2	3	8	5	1	0
National multiples	**9.03%**	3.03%	5.56%	0%	4%	6.54%	14.53%	8.64%	9.09%	0%
	56	1	1	0	1	10	25	14	4	0
Improved restaurant/pub offer	**4.19%**	0%	0%	0%	0%	5.88%	4.65%	4.32%	4.55%	0%
	26	0	0	0	0	9	8	7	2	0
More leisure uses	**4.84%**	0%	0%	0%	0%	6.54%	6.98%	4.32%	2.27%	0%
	30	0	0	0	0	10	12	7	1	0
Better environmental quality	**10.48%**	9.09%	16.67%	20%	20%	12.42%	8.14%	8.64%	11.36%	0%
	65	3	3	2	5	19	14	14	5	0
Safety/crime	**1.45%**	0%	5.56%	0%	0%	1.31%	1.74%	0%	6.82%	0%
	9	0	1	0	0	2	3	0	3	0
* No change/good	**16.94%**	54.55%	22.22%	30%	40%	20.26%	6.40%	6.79%	31.82%	100%
	105	18	4	3	10	31	11	11	14	3
Other	**1.77%**	0%	11.11%	10%	0%	1.31%	0.58%	3.09%	0%	0%
	11	0	2	1	0	2	1	5	0	0
Cheaper parking	**2.42%**	0%	5.56%	0%	4%	5.23%	1.74%	1.23%	0%	0%
	15	0	1	0	1	8	3	2	0	0
Asda	**1.45%**	0%	0%	0%	0%	1.31%	1.16%	2.47%	2.27%	0%
	9	0	0	0	0	2	2	4	1	0
Butcher	**0.65%**	0%	0%	0%	0%	0.65%	1.16%	0.62%	0%	0%
	4	0	0	0	0	1	2	1	0	0
More clothes stores	**9.03%**	6.06%	5.56%	0%	4%	5.88%	5.81%	17.28%	11.36%	0%
	56	2	1	0	1	9	10	28	5	0
Better/ more bike lanes	**0.16%**	3.03%	0%	0%	0%	0%	0%	0%	0%	0%
	1	1	0	0	0	0	0	0	0	0
Less traffic/ improved traffic conditions	**0.97%**	0%	0%	10%	0%	1.96%	1.16%	0%	0%	0%
	6	0	0	1	0	3	2	0	0	0
Less empty shops	**4.19%**	3.03%	11.11%	10%	0%	3.92%	4.07%	5.56%	0%	0%
	26	1	2	1	0	6	7	9	0	0
	3.23%	3.03%	5.56%	0%	0%	2.61%	5.23%	3.09%	0%	0%

Shoe shops	**20**	1	1	0	0	4	9	5	0	0
	1.77%	0%	0%	0%	0%	1.96%	1.74%	3.09%	0%	0%
More cafes	**11**	0	0	0	0	3	3	5	0	0
	0.97%	0%	0%	0%	0%	0%	2.33%	0.62%	2.27%	0%
More furniture shops	**6**	0	0	0	0	0	4	1	1	0
	2.42%	0%	0%	10%	0%	1.31%	1.16%	5.56%	2.27%	0%
Department store	**15**	0	0	1	0	2	2	9	1	0
	0.97%	0%	0%	0%	0%	1.31%	0.58%	1.23%	2.27%	0%
M&S	**6**	0	0	0	0	2	1	2	1	0
	0.48%	0%	5.56%	10%	0%	0.65%	0%	0%	0%	0%
Re-open Newhaven beach	**3**	0	1	1	0	1	0	0	0	0
	1.13%	0%	0%	0%	0%	1.96%	0.58%	1.85%	0%	0%
Supermarket	**7**	0	0	0	0	3	1	3	0	0
	0.81%	0%	0%	0%	0%	1.31%	0.58%	1.23%	0%	0%
More Independent non food stores	**5**	0	0	0	0	2	1	2	0	0

Q26. What do you do on your trips to Peacehaven (Meridian Centre)?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	396	**4**	**3**	**3**	**3**	**42**	**42**	**252**	**46**	**1**
	34.34%	0%	33.33%	33.33%	0%	28.57%	28.57%	36.11%	41.30%	0%
Food shopping	**136**	0	1	1	0	12	12	91	19	0
	21.21%	50%	66.67%	0%	66.67%	21.43%	23.81%	19.84%	19.57%	0%
Non food shopping	**84**	2	2	0	2	9	10	50	9	0
	6.06%	0%	0%	0%	0%	0%	4.76%	7.14%	8.70%	0%
Bank/building soc	**24**	0	0	0	0	0	2	18	4	0
	4.80%	0%	0%	0%	0%	2.38%	0%	5.95%	6.52%	0%
Dry Cleaners/ Hairdressers/ other services	**19**	0	0	0	0	1	0	15	3	0
	5.81%	0%	0%	0%	0%	0%	0%	9.13%	0%	0%
Post Office	**23**	0	0	0	0	0	0	23	0	0
	3.03%	0%	0%	0%	0%	7.14%	7.14%	2.38%	0%	0%
Restaurant/pubs/	**12**	0	0	0	0	3	3	6	0	0
	10.86%	0%	0%	0%	33.33%	9.52%	16.67%	10.32%	10.87%	0%
Other leisure	**43**	0	0	0	1	4	7	26	5	0
	1.26%	0%	0%	0%	0%	0%	4.76%	1.19%	0%	0%
Market (including Farmers)	**5**	0	0	0	0	0	2	3	0	0
	3.79%	25%	0%	66.67%	0%	7.14%	9.52%	1.19%	4.35%	0%
Visiting friends/relatives	**15**	1	0	2	0	3	4	3	2	0
	0.25%	0%	0%	0%	0%	2.38%	0%	0%	0%	0%
School run	**1**	0	0	0	0	1	0	0	0	0
	1.26%	0%	0%	0%	0%	4.76%	2.38%	0.79%	0%	0%
Work/ business	**5**	0	0	0	0	2	1	2	0	0
	5.30%	0%	0%	0%	0%	16.67%	0%	4.37%	4.35%	100%
Browsing	**21**	0	0	0	0	7	0	11	2	1
	2.02%	25%	0%	0%	0%	0%	2.38%	1.59%	4.35%	0%
Doctor/ dentist	**8**	1	0	0	0	0	1	4	2	0

Q27. What improvements would make you visit Peacehaven (Meridian Centre) more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	277	**4**	**2**	**3**	**4**	**29**	**31**	**163**	**40**	**1**
	10.47%	0%	0%	0%	50%	6.90%	0%	14.11%	5%	0%
More/better food shopping	**29**	0	0	0	2	2	0	23	2	0
	3.25%	0%	0%	0%	0%	0%	0%	5.52%	0%	0%
More/better Non food shopping	**9**	0	0	0	0	0	0	9	0	0
	2.17%	0%	0%	0%	0%	6.90%	0%	2.45%	0%	0%
More/better car parking (incl less traffic wardens)	**6**	0	0	0	0	2	0	4	0	0
	9.03%	0%	0%	0%	25%	3.45%	6.45%	11.66%	5%	0%
National multiples	**25**	0	0	0	1	1	2	19	2	0
	2.89%	0%	0%	0%	0%	0%	0%	2.45%	10%	0%
Improved restaurant/pub offer	**8**	0	0	0	0	0	0	4	4	0
	1.81%	0%	0%	0%	0%	3.45%	0%	0.61%	7.50%	0%
More leisure uses	**5**	0	0	0	0	1	0	1	3	0
	5.42%	0%	0%	0%	0%	3.45%	6.45%	6.13%	5%	0%
Better environmental quality	**15**	0	0	0	0	1	2	10	2	0
	0.36%	0%	0%	0%	0%	0%	0%	0.61%	0%	0%
Safety/crime	**1**	0	0	0	0	0	0	1	0	0
	45.85%	100%	100%	100%	0%	72.41%	77.42%	29.45%	60%	100%
* No change/good	**127**	4	2	3	0	21	24	48	24	1
	1.08%	0%	0%	0%	0%	0%	3.23%	1.23%	0%	0%
Other	**3**	0	0	0	0	0	1	2	0	0
	0.72%	0%	0%	0%	0%	0%	0%	0.61%	2.50%	0%
Cheaper parking	**2**	0	0	0	0	0	0	1	1	0
	6.50%	0%	0%	0%	0%	0%	3.23%	9.82%	2.50%	0%
More clothes stores	**18**	0	0	0	0	0	1	16	1	0
	1.08%	0%	0%	0%	25%	3.45%	0%	0%	2.50%	0%
Better bus services/ public transport provision.	**3**	0	0	0	1	1	0	0	1	0
	5.78%	0%	0%	0%	0%	0%	0%	9.82%	0%	0%
Supermarket (to provide competition for the Co-op)	**16**	0	0	0	0	0	0	16	0	0
	2.53%	0%	0%	0%	0%	0%	3.23%	3.68%	0%	0%
Dry Cleaners	**7**	0	0	0	0	0	1	6	0	0
	1.08%	0%	0%	0%	0%	0%	0%	1.84%	0%	0%
Shoe shops	**3**	0	0	0	0	0	0	3	0	0

Q28. What do you do on your trips to Peacehaven (South Coast Road Area)?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	272	**10**	**5**	**3**	**4**	**33**	**36**	**146**	**35**	**0**
	10.29%	10%	0%	0%	0%	3.03%	8.33%	13.70%	8.57%	0%
Food shopping	**28**	1	0	0	0	1	3	20	3	0
	36.03%	40%	60%	0%	75%	48.48%	47.22%	27.40%	42.86%	0%

Non food shopping	**98**	4	3	0	3	16	17	40	15	0
	14.34%	0%	0%	0%	0%	3.03%	11.11%	19.86%	14.29%	0%
Bank/building soc	**39**	0	0	0	0	1	4	29	5	0
	6.62%	20%	0%	0%	0%	6.06%	8.33%	6.85%	2.86%	0%
Dry Cleaners/ Hairdressers/ other services	**18**	2	0	0	0	2	3	10	1	0
	5.88%	0%	0%	0%	0%	0%	2.78%	8.22%	8.57%	0%
Post Office	**16**	0	0	0	0	0	1	12	3	0
	3.68%	10%	0%	0%	0%	6.06%	2.78%	2.74%	5.71%	0%
Restaurant/pubs/	**10**	1	0	0	0	2	1	4	2	0
	6.99%	20%	20%	33.33%	0%	0%	8.33%	8.22%	0%	0%
Other leisure	**19**	2	1	1	0	0	3	12	0	0
	4.04%	0%	20%	33.33%	0%	9.09%	5.56%	0.68%	8.57%	0%
Visiting friends/relatives	**11**	0	1	1	0	3	2	1	3	0
	0.37%	0%	0%	0%	0%	0%	0%	0.68%	0%	0%
School run	**1**	0	0	0	0	0	0	1	0	0
	0.37%	0%	0%	0%	0%	0%	0%	0.68%	0%	0%
Other	**1**	0	0	0	0	0	0	1	0	0
	2.21%	0%	0%	0%	0%	3.03%	2.78%	1.37%	5.71%	0%
Doctor/ dentist	**6**	0	0	0	0	1	1	2	2	0
	1.84%	0%	0%	0%	25%	0%	0%	2.74%	0%	0%
Work/ business	**5**	0	0	0	1	0	0	4	0	0
	7.35%	0%	0%	33.33%	0%	21.21%	2.78%	6.85%	2.86%	0%
Browsing	**20**	0	0	1	0	7	1	10	1	0

Q29. What improvements would make you visit Peacehaven (South Coast Road Area) more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	228	**10**	**4**	**3**	**6**	**31**	**31**	**114**	**29**	**0**
	10.09%	0%	0%	0%	16.67%	0%	3.23%	14.91%	13.79%	0%
More/better food shopping	**23**	0	0	0	1	0	1	17	4	0
	3.95%	0%	0%	0%	0%	0%	0%	7.02%	3.45%	0%
More/better Non food shopping	**9**	0	0	0	0	0	0	8	1	0
	6.14%	0%	0%	0%	16.67%	9.68%	6.45%	4.39%	10.34%	0%
More/better car parking (incl less traffic wardens)	**14**	0	0	0	1	3	2	5	3	0
	5.26%	0%	0%	0%	33.33%	3.23%	6.45%	4.39%	6.90%	0%
National multiples	**12**	0	0	0	2	1	2	5	2	0
	2.19%	20%	0%	0%	0%	3.23%	3.23%	0.88%	0%	0%
Improved restaurant/pub offer	**5**	2	0	0	0	1	1	1	0	0
	3.07%	0%	25%	0%	16.67%	0%	9.68%	1.75%	0%	0%
Better environmental quality	**7**	0	1	0	1	0	3	2	0	0
	58.33%	80%	75%	100%	0%	70.97%	70.97%	50%	62.07%	0%
* No change/good	**133**	8	3	3	0	22	22	57	18	0
	2.19%	0%	0%	0%	0%	0%	0%	3.51%	3.45%	0%
Other	**5**	0	0	0	0	0	0	4	1	0
	1.75%	0%	0%	0%	16.67%	6.45%	0%	0.88%	0%	0%
Cheaper parking	**4**	0	0	0	1	2	0	1	0	0
	3.51%	0%	0%	0%	0%	0%	0%	7.02%	0%	0%
More clothes stores	**8**	0	0	0	0	0	0	8	0	0
	3.51%	0%	0%	0%	0%	6.45%	0%	5.26%	0%	0%
Improved traffic	**8**	0	0	0	0	2	0	6	0	0

Q30. What do you do on your trips to Seaford?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	1062	**53**	**12**	**22**	**26**	**635**	**146**	**119**	**45**	**4**
	19.68%	15.09%	0%	9.09%	11.54%	23.94%	15.07%	14.29%	11.11%	0%
Food shopping	**209**	8	0	2	3	152	22	17	5	0
	22.88%	26.42%	16.67%	13.64%	26.92%	19.69%	31.51%	26.05%	31.11%	25%
Non food shopping	**243**	14	2	3	7	125	46	31	14	1
	7.82%	1.89%	8.33%	0%	3.85%	8.66%	11.64%	5.04%	4.44%	0%
Bank/building soc	**83**	1	1	0	1	55	17	6	2	0
	3.58%	3.77%	0%	0%	0%	4.72%	2.74%	0.84%	2.22%	0%
Dry Cleaners/ Hairdressers/ other services	**38**	2	0	0	0	30	4	1	1	0
	4.33%	0%	16.67%	0%	0%	6.30%	2.05%	0.84%	0%	0%
Post Office	**46**	0	2	0	0	40	3	1	0	0
	7.34%	5.66%	0%	13.64%	0%	6.93%	7.53%	7.56%	17.78%	0%
Restaurant/pubs/	**78**	3	0	3	0	44	11	9	8	0
	10.45%	22.64%	25%	27.27%	26.92%	6.46%	11.64%	15.13%	13.33%	25%
Other leisure	**111**	12	3	6	7	41	17	18	6	1
	1.13%	0%	0%	0%	0%	1.73%	0.68%	0%	0%	0%
Market (including Farmers)	**12**	0	0	0	0	11	1	0	0	0
	5.65%	3.77%	0%	18.18%	7.69%	4.41%	6.16%	9.24%	8.89%	0%
Visiting friends/relatives	**60**	2	0	4	2	28	9	11	4	0
	0.56%	0%	0%	0%	0%	0.94%	0%	0%	0%	0%
Church	**6**	0	0	0	0	6	0	0	0	0
	0.94%	0%	0%	0%	0%	1.10%	2.05%	0%	0%	0%
Train station	**10**	0	0	0	0	7	3	0	0	0
	0.38%	0%	0%	0%	0%	0.63%	0%	0%	0%	0%
School run	**4**	0	0	0	0	4	0	0	0	0
	0.19%	0%	8.33%	0%	0%	0%	0%	0.84%	0%	0%
Other	**2**	0	1	0	0	0	0	1	0	0
	3.67%	1.89%	0%	0%	0%	5.35%	2.05%	0.84%	0%	0%
Doctor/ dentist	**39**	1	0	0	0	34	3	1	0	0
	2.73%	1.89%	8.33%	4.55%	11.54%	2.83%	2.74%	0.84%	0%	0%
Work/ business	**29**	1	1	1	3	18	4	1	0	0
	8.66%	16.98%	16.67%	13.64%	11.54%	6.30%	4.11%	18.49%	11.11%	50%
Browsing	**92**	9	2	3	3	40	6	22	5	2

Q31. What improvements would make you visit Seaford more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9

	551	**38**	**10**	**15**	**25**	**265**	**91**	**77**	**27**	**3**
	4.54%	0%	0%	0%	0%	6.04%	5.49%	3.90%	3.70%	0%
More/better food shopping	**25**	0	0	0	0	16	5	3	1	0
	2.36%	0%	0%	0%	0%	4.15%	1.10%	1.30%	0%	0%
More/better Non food shopping	**13**	0	0	0	0	11	1	1	0	0
	10.16%	5.26%	10%	6.67%	8%	10.57%	10.99%	11.69%	11.11%	0%
More/better car parking (incl less traffic wardens)	**56**	2	1	1	2	28	10	9	3	0
	4.90%	0%	0%	0%	0%	7.92%	3.30%	2.60%	3.70%	0%
National multiples	**27**	0	0	0	0	21	3	2	1	0
	1.63%	0%	0%	0%	4%	2.26%	1.10%	1.30%	0%	0%
Improved restaurant/pub offer	**9**	0	0	0	1	6	1	1	0	0
	2.36%	0%	0%	0%	0%	3.40%	2.20%	1.30%	0%	33.33%
More leisure uses	**13**	0	0	0	0	9	2	1	0	1
	1.63%	0%	0%	0%	4%	2.64%	0%	1.30%	0%	0%
Better environmental quality	**9**	0	0	0	1	7	0	1	0	0
	51.36%	86.84%	90%	80%	64%	30.57%	67.03%	67.53%	62.96%	66.67%
* No change/good	**283**	33	9	12	16	81	61	52	17	2
	1.63%	0%	0%	0%	0%	2.64%	0%	1.30%	3.70%	0%
Other	**9**	0	0	0	0	7	0	1	1	0
	3.45%	2.63%	0%	0%	12%	4.15%	2.20%	2.60%	0%	0%
Cheaper parking	**19**	1	0	0	3	11	2	2	0	0
	6.53%	2.63%	0%	6.67%	8%	9.06%	3.30%	3.90%	7.41%	0%
More clothes stores	**36**	1	0	1	2	24	3	3	2	0
	1.27%	2.63%	0%	6.67%	0%	0.75%	1.10%	1.30%	3.70%	0%
Better bus services/ public transport provision.	**7**	1	0	1	0	2	1	1	1	0
	2.54%	0%	0%	0%	0%	5.28%	0%	0%	0%	0%
Less empty shops	**14**	0	0	0	0	14	0	0	0	0
	2.36%	0%	0%	0%	0%	4.53%	1.10%	0%	0%	0%
Electrical stores	**13**	0	0	0	0	12	1	0	0	0
	1.63%	0%	0%	0%	0%	3.02%	0%	0%	3.70%	0%
Shoe shops	**9**	0	0	0	0	8	0	0	1	0
	1.09%	0%	0%	0%	0%	2.26%	0%	0%	0%	0%
Less charity shops	**6**	0	0	0	0	6	0	0	0	0
	0.54%	0%	0%	0%	0%	0.75%	1.10%	0%	0%	0%
Supermarket	**3**	0	0	0	0	2	1	0	0	0

Q32. What do you do on your trips Ringmer?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	200	**51**	**6**	**11**	**105**	**11**	**5**	**5**	**6**	**0**
	27.50%	15.69%	33.33%	9.09%	38.10%	18.18%	40%	0%	0%	0%
Food shopping	**55**	8	2	1	40	2	2	0	0	0
	16%	13.73%	16.67%	27.27%	17.14%	9.09%	0%	20%	16.67%	0%
Non food shopping	**32**	7	1	3	18	1	0	1	1	0
	4%	1.96%	0%	0%	6.67%	0%	0%	0%	0%	0%
Bank/building soc	**8**	1	0	0	7	0	0	0	0	0
	2.50%	5.88%	0%	9.09%	0.95%	0%	0%	0%	0%	0%
Dry Cleaners/ Hairdressers/ other services	**5**	3	0	1	1	0	0	0	0	0
	12.50%	23.53%	0%	0%	12.38%	0%	0%	0%	0%	0%
Post Office	**25**	12	0	0	13	0	0	0	0	0
	4.50%	7.84%	0%	0%	2.86%	0%	0%	20%	16.67%	0%
Restaurant/pubs/	**9**	4	0	0	3	0	0	1	1	0
	9%	7.84%	33.33%	0%	7.62%	18.18%	20%	20%	0%	0%
Other leisure	**18**	4	2	0	8	2	1	1	0	0
	1%	0%	0%	0%	0.95%	9.09%	0%	0%	0%	0%
Market (including Farmers)	**2**	0	0	0	1	1	0	0	0	0
	10.50%	11.76%	16.67%	36.36%	3.81%	27.27%	0%	20%	33.33%	0%
Visiting friends/relatives	**21**	6	1	4	4	3	0	1	2	0
	1.50%	1.96%	0%	0%	0.95%	9.09%	0%	0%	0%	0%
School run	**3**	1	0	0	1	1	0	0	0	0
	0.50%	0%	0%	0%	0%	0%	0%	0%	16.67%	0%
Other	**1**	0	0	0	0	0	0	0	1	0
	2%	3.92%	0%	0%	0.95%	9.09%	0%	0%	0%	0%
Work/ business	**4**	2	0	0	1	1	0	0	0	0
	5.50%	3.92%	0%	18.18%	5.71%	0%	20%	0%	0%	0%
Doctor/ dentist	**11**	2	0	2	6	0	1	0	0	0
	3%	1.96%	0%	0%	1.90%	0%	20%	20%	16.67%	0%
Browsing	**6**	1	0	0	2	0	1	1	1	0

Q33. What improvements would make you visit Ringmer more frequently?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	140	**38**	**4**	**9**	**68**	**8**	**4**	**4**	**5**	**0**
	7.86%	7.89%	0%	0%	8.82%	0%	25%	0%	20%	0%
More/better food shopping	**11**	3	0	0	6	0	1	0	1	0
	2.14%	0%	0%	0%	4.41%	0%	0%	0%	0%	0%
More/better Non food shopping	**3**	0	0	0	3	0	0	0	0	0
	4.29%	2.63%	0%	11.11%	5.88%	0%	0%	0%	0%	0%
More/better car parking (incl less traffic wardens)	**6**	1	0	1	4	0	0	0	0	0
	5.71%	2.63%	0%	22.22%	5.88%	0%	0%	25%	0%	0%
National multiples	**8**	1	0	2	4	0	0	1	0	0
	2.14%	2.63%	0%	0%	1.47%	0%	0%	0%	20%	0%
More leisure uses	**3**	1	0	0	1	0	0	0	1	0
	2.86%	0%	0%	0%	5.88%	0%	0%	0%	0%	0%
Better environmental quality	**4**	0	0	0	4	0	0	0	0	0
	0.71%	2.63%	0%	0%	0%	0%	0%	0%	0%	0%
Safety/crime	**1**	1	0	0	0	0	0	0	0	0
	69.29%	78.95%	100%	66.67%	58.82%	100%	75%	75%	60%	0%
* No change/good	**97**	30	4	6	40	8	3	3	3	0
	1.43%	0%	0%	0%	2.94%	0%	0%	0%	0%	0%
Other	**2**	0	0	0	2	0	0	0	0	0
	0.71%	0%	0%	0%	1.47%	0%	0%	0%	0%	0%
Cheaper parking	**1**	0	0	0	1	0	0	0	0	0
	2.86%	2.63%	0%	0%	4.41%	0%	0%	0%	0%	0%
Less traffic/ improved public transport	**4**	1	0	0	3	0	0	0	0	0

Q34. Why do you not visit Lewes town centre, what improvements would make you visit it more often?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	284	**2**	**0**	**10**	**6**	**101**	**29**	**73**	**26**	**37**
Difficult access by public transport	**10.56%**	0%	0%	10%	0%	10.89%	17.24%	12.33%	11.54%	2.70%
	30	0	0	1	0	11	5	9	3	1
Empty or closing down shops	**0.70%**	0%	0%	0%	0%	0.99%	0%	1.37%	0%	0%
	2	0	0	0	0	1	0	1	0	0
Expensive FOOD shops	**0.70%**	0%	0%	0%	0%	1.98%	0%	0%	0%	0%
	2	0	0	0	0	2	0	0	0	0
Expensive NON FOOD shops	**1.06%**	0%	0%	0%	0%	1.98%	3.45%	0%	0%	0%
	3	0	0	0	0	2	1	0	0	0
Expensive parking	**7.75%**	0%	0%	10%	16.67%	9.90%	6.90%	2.74%	11.54%	8.11%
	22	0	0	1	1	10	2	2	3	3
No separation of pedestrians and vehicles	**0.35%**	0%	0%	0%	0%	0%	0%	1.37%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Not enough cafes, restaurants and pubs	**0.35%**	0%	0%	0%	0%	0.99%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Not enough independent FOOD shops	**0.35%**	0%	0%	0%	0%	0%	0%	1.37%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Not enough independent NON FOOD shops	**1.76%**	0%	0%	0%	16.67%	0%	3.45%	2.74%	3.85%	0%
	5	0	0	0	1	0	1	2	1	0
Not enough nationally known FOOD shops	**1.41%**	0%	0%	10%	0%	0.99%	0%	1.37%	3.85%	0%
	4	0	0	1	0	1	0	1	1	0
Not enough nationally known NON FOOD shops	**3.52%**	0%	0%	0%	16.67%	0.99%	0%	6.85%	11.54%	0%
	10	0	0	0	1	1	0	5	3	0
Not enough parking	**6.69%**	0%	0%	20%	0%	3.96%	6.90%	5.48%	11.54%	10.81%
	19	0	0	2	0	4	2	4	3	4
Poor quality independent FOOD shops	**1.06%**	0%	0%	0%	0%	1.98%	0%	0%	3.85%	0%
	3	0	0	0	0	2	0	0	1	0
Poor quality independent NON FOOD shops	**1.41%**	0%	0%	10%	0%	1.98%	0%	0%	3.85%	0%
	4	0	0	1	0	2	0	0	1	0
Poor quality nationally known FOOD shops	**0.35%**	0%	0%	0%	0%	0.99%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
Poor quality nationally known NON FOOD shops	**0.70%**	0%	0%	10%	0%	0.99%	0%	0%	0%	0%
	2	0	0	1	0	1	0	0	0	0
Other	**4.23%**	0%	0%	0%	33.33%	4.95%	3.45%	4.11%	0%	2.70%
	12	0	0	0	2	5	1	3	0	1
Too far away	**17.61%**	50%	0%	0%	16.67%	16.83%	17.24%	26.03%	3.85%	16.22%
	50	1	0	0	1	17	5	19	1	6
Don"t know	**12.32%**	0%	0%	10%	0%	10.89%	17.24%	10.96%	11.54%	18.92%
	35	0	0	1	0	11	5	8	3	7
No reason/ nothing	**27.11%**	50%	0%	20%	0%	28.71%	24.14%	23.29%	23.08%	40.54%
	77	1	0	2	0	29	7	17	6	15

Q35. Why do you not visit Newhaven town centre, what improvements would make you visit it more often?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	634	**124**	**23**	**41**	**78**	**132**	**11**	**74**	**54**	**97**
Difficult access by public transport	**4.10%**	5.65%	13.04%	7.32%	3.85%	3.03%	9.09%	1.35%	5.56%	1.03%
	26	7	3	3	3	4	1	1	3	1
Empty or closing down shops	**5.05%**	3.23%	4.35%	4.88%	2.56%	7.58%	27.27%	6.76%	9.26%	0%
	32	4	1	2	2	10	3	5	5	0
Expensive FOOD shops	**0.32%**	0.81%	0%	0%	0%	0%	0%	1.35%	0%	0%
	2	1	0	0	0	0	0	1	0	0
Expensive NON FOOD shops	**0.16%**	0%	0%	0%	0%	0%	0%	1.35%	0%	0%
	1	0	0	0	0	0	0	1	0	0
Expensive parking	**1.58%**	0%	0%	2.44%	2.56%	2.27%	9.09%	1.35%	3.70%	0%
	10	0	0	1	2	3	1	1	2	0
No department store	**1.26%**	0%	0%	0%	2.56%	3.79%	0%	0%	1.85%	0%
	8	0	0	0	2	5	0	0	1	0
No separation of pedestrians and vehicles	**0.16%**	0%	0%	0%	0%	0.76%	0%	0%	0%	0%
	1	0	0	0	0	1	0	0	0	0
No supermarket	**1.74%**	0%	0%	2.44%	2.56%	6.06%	0%	0%	0%	0%
	11	0	0	1	2	8	0	0	0	0
Not enough cafes, restaurants and pubs	**1.10%**	0%	0%	0%	1.28%	1.52%	9.09%	0%	5.56%	0%
	7	0	0	0	1	2	1	0	3	0
Not enough independent FOOD shops	**2.05%**	1.61%	0%	0%	2.56%	1.52%	18.18%	2.70%	5.56%	0%
	13	2	0	0	2	2	2	2	3	0
Not enough independent NON FOOD shops	**3%**	3.23%	0%	0%	3.85%	3.03%	0%	6.76%	5.56%	0%
	19	4	0	0	3	4	0	5	3	0
Not enough nationally known FOOD shops	**2.68%**	1.61%	0%	2.44%	6.41%	0.76%	0%	6.76%	5.56%	0%
	17	2	0	1	5	1	0	5	3	0
Not enough nationally known NON FOOD shops	**5.05%**	4.84%	0%	2.44%	10.26%	2.27%	0%	13.51%	5.56%	1.03%
	32	6	0	1	8	3	0	10	3	1
Not enough parking	**1.26%**	0%	0%	0%	3.85%	0.76%	9.09%	1.35%	3.70%	0%
	8	0	0	0	3	1	1	1	2	0
Poor quality independent FOOD shops	**1.58%**	2.42%	0%	0%	1.28%	2.27%	0%	1.35%	3.70%	0%
	10	3	0	0	1	3	0	1	2	0
Poor quality independent NON FOOD shops	**1.89%**	2.42%	0%	0%	1.28%	1.52%	0%	6.76%	1.85%	0%
	12	3	0	0	1	2	0	5	1	0
Poor quality nationally known FOOD shops	**1.26%**	2.42%	0%	0%	1.28%	1.52%	0%	1.35%	1.85%	0%
	8	3	0	0	1	2	0	1	1	0
Poor quality nationally known NON FOOD shops	**1.10%**	2.42%	0%	0%	0%	1.52%	0%	1.35%	1.85%	0%
	7	3	0	0	0	2	0	1	1	0
Other	**1.74%**	1.61%	8.70%	2.44%	0%	1.52%	0%	4.05%	1.85%	0%
	11	2	2	1	0	2	0	3	1	0
Too far away	**11.99%**	7.26%	30.43%	34.15%	20.51%	2.27%	9.09%	2.70%	9.26%	19.59%
	76	9	7	14	16	3	1	2	5	19
Don"t know	**10.73%**	17.74%	4.35%	4.88%	2.56%	7.58%	0%	1.35%	5.56%	27.84%
	68	22	1	2	2	10	0	1	3	27
	33.75%	39.52%	21.74%	34.15%	26.92%	34.85%	9.09%	22.97%	22.22%	50.52%

No reason/ nothing	**214**	49	5	14	21	46	1	17	12	49
	6.47%	3.23%	17.39%	2.44%	3.85%	13.64%	0%	14.86%	0%	0%
Poor environment/ run down/ unattractive	**41**	4	4	1	3	18	0	11	0	0

Q36. Why do you not visit Peacehaven (Meridian Centre) town centre, what improvements would make you visit it more often?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	729	**127**	**34**	**43**	**89**	**197**	**85**	**9**	**45**	**100**
	3.84%	8.66%	2.94%	6.98%	2.25%	2.54%	3.53%	0%	4.44%	1%
Difficult access by public transport	**28**	11	1	3	2	5	3	0	2	1
	0.82%	0.79%	0%	2.33%	0%	0.51%	2.35%	11.11%	0%	0%
Empty or closing down shops	**6**	1	0	1	0	1	2	1	0	0
	0.27%	0%	0%	0%	0%	1.02%	0%	0%	0%	0%
Expensive FOOD shops	**2**	0	0	0	0	2	0	0	0	0
	0.41%	0.79%	0%	0%	0%	0%	2.35%	0%	0%	0%
Expensive parking	**3**	1	0	0	0	0	2	0	0	0
	0.27%	0%	0%	0%	0%	0.51%	1.18%	0%	0%	0%
No department store	**2**	0	0	0	0	1	1	0	0	0
	0.55%	0%	0%	0%	2.25%	1.02%	0%	0%	0%	0%
No supermarket	**4**	0	0	0	2	2	0	0	0	0
	0.69%	0%	0%	0%	4.49%	0.51%	0%	0%	0%	0%
Not enough cafes, restaurants and pubs	**5**	0	0	0	4	1	0	0	0	0
	1.23%	0%	0%	0%	3.37%	1.02%	1.18%	0%	6.67%	0%
Not enough independent FOOD shops	**9**	0	0	0	3	2	1	0	3	0
	1.78%	0.79%	0%	0%	3.37%	1.52%	3.53%	0%	6.67%	0%
Not enough independent NON FOOD shops	**13**	1	0	0	3	3	3	0	3	0
	1.78%	0.79%	0%	0%	4.49%	1.02%	4.71%	0%	4.44%	0%
Not enough nationally known FOOD shops	**13**	1	0	0	4	2	4	0	2	0
	2.06%	2.36%	0%	0%	3.37%	1.02%	5.88%	0%	4.44%	0%
Not enough nationally known NON FOOD shops	**15**	3	0	0	3	2	5	0	2	0
	0.27%	0%	0%	0%	1.12%	0%	0%	0%	2.22%	0%
Not enough parking	**2**	0	0	0	1	0	0	0	1	0
	0.69%	0%	0%	0%	0%	1.02%	0%	0%	6.67%	0%
Poor quality independent FOOD shops	**5**	0	0	0	0	2	0	0	3	0
	0.96%	0%	0%	0%	1.12%	1.52%	0%	0%	6.67%	0%
Poor quality independent NON FOOD shops	**7**	0	0	0	1	3	0	0	3	0
	0.27%	0%	0%	0%	0%	0.51%	0%	0%	2.22%	0%
Poor quality nationally known FOOD shops	**2**	0	0	0	0	1	0	0	1	0
	0.55%	0%	0%	0%	0%	0.51%	2.35%	0%	2.22%	0%
Poor quality nationally known NON FOOD shops	**4**	0	0	0	0	1	2	0	1	0
	0.27%	0%	0%	0%	0%	0%	1.18%	0%	2.22%	0%
Other	**2**	0	0	0	0	0	1	0	1	0
	19.07%	11.02%	35.29%	32.56%	32.58%	17.77%	20%	0%	8.89%	14%
Too far away	**139**	14	12	14	29	35	17	0	4	14
	15.09%	22.05%	8.82%	11.63%	5.62%	12.69%	9.41%	11.11%	8.89%	31%
Don''t know	**110**	28	3	5	5	25	8	1	4	31
	42.25%	49.61%	35.29%	30.23%	33.71%	43.15%	38.82%	44.44%	33.33%	53%
No reason/ nothing	**308**	63	12	13	30	85	33	4	15	53
	3.84%	0.79%	8.82%	13.95%	2.25%	7.61%	1.18%	0%	0%	0%
I don''t know where it is/ I have never heard of it	**28**	1	3	6	2	15	1	0	0	0
	3.02%	2.36%	8.82%	2.33%	0%	4.57%	2.35%	33.33%	0%	1%
Poor environment/ run down/ unattractive	**22**	3	3	1	0	9	2	3	0	1

Q37. Why do you not visit Peacehaven (South Coast Road Area) town centre, what improvements would make you visit it more often?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	784	**124**	**33**	**44**	**87**	**196**	**90**	**49**	**59**	**102**
	3.83%	8.06%	3.03%	6.82%	3.45%	2.55%	5.56%	2.04%	1.69%	0.98%
Difficult access by public transport	**30**	10	1	3	3	5	5	1	1	1
	0.51%	0%	0%	2.27%	0%	0%	2.22%	0%	1.69%	0%
Empty or closing down shops	**4**	0	0	1	0	0	2	0	1	0
	0.51%	0%	0%	0%	0%	0%	3.33%	0%	1.69%	0%
Expensive parking	**4**	0	0	0	0	0	3	0	1	0
	0.38%	0%	0%	0%	1.15%	0.51%	1.11%	0%	0%	0%
No department store	**3**	0	0	0	1	1	1	0	0	0
	0.77%	0.81%	0%	0%	2.30%	1.53%	0%	0%	0%	0%
No supermarket	**6**	1	0	0	2	3	0	0	0	0
	1.40%	0.81%	0%	0%	3.45%	1.02%	1.11%	2.04%	5.08%	0%
Not enough cafes, restaurants and pubs	**11**	1	0	0	3	2	1	1	3	0
	2.04%	0.81%	0%	0%	3.45%	2.04%	3.33%	6.12%	3.39%	0%
Not enough independent FOOD shops	**16**	1	0	0	3	4	3	3	2	0
	1.91%	1.61%	0%	0%	3.45%	0.51%	3.33%	8.16%	3.39%	0%
Not enough independent NON FOOD shops	**15**	2	0	0	3	1	3	4	2	0
	1.79%	0.81%	0%	0%	3.45%	0.51%	5.56%	2.04%	5.08%	0%
Not enough nationally known FOOD shops	**14**	1	0	0	3	1	5	1	3	0
	2.55%	1.61%	3.03%	0%	3.45%	0%	7.78%	10.20%	3.39%	0%
Not enough nationally known NON FOOD shops	**20**	2	1	0	3	0	7	5	2	0
	1.66%	0%	0%	0%	0%	1.02%	3.33%	8.16%	6.78%	0%
Not enough parking	**13**	0	0	0	0	2	3	4	4	0
	1.02%	1.61%	0%	0%	0%	0%	1.11%	2.04%	6.78%	0%
Poor quality independent FOOD shops	**8**	2	0	0	0	0	1	1	4	0
	1.02%	1.61%	0%	0%	0%	0%	2.22%	2.04%	5.08%	0%
Poor quality independent NON FOOD shops	**8**	2	0	0	0	0	2	1	3	0
	0.89%	0%	0%	0%	0%	0.51%	1.11%	2.04%	6.78%	0%
Poor quality nationally known FOOD shops	**7**	0	0	0	0	1	1	1	4	0
	0.89%	0%	0%	0%	0%	0%	2.22%	4.08%	5.08%	0%
Poor quality nationally known NON FOOD shops	**7**	0	0	0	0	0	2	2	3	0
	0.77%	0%	3.03%	0%	0%	1.02%	2.22%	0%	1.69%	0%
Other	**6**	0	1	0	0	2	2	0	1	0
	15.18%	11.29%	27.27%	31.82%	31.03%	11.73%	17.78%	2.04%	3.39%	12.75%
Too far away	**119**	14	9	14	27	23	16	1	2	13
	17.73%	20.97%	12.12%	11.36%	8.05%	24.49%	8.89%	10.20%	8.47%	30.39%
Don''t know	**139**	26	4	5	7	48	8	5	5	31

	40.82%	46.77%	42.42%	31.82%	34.48%	46.94%	25.56%	34.69%	28.81%	53.92%
No reason/ nothing	**320**	58	14	14	30	92	23	17	17	55
	3.06%	0.81%	9.09%	2.27%	2.30%	5.61%	1.11%	4.08%	1.69%	1.96%
Poor environment/ run down/ unattractive	**24**	1	3	1	2	11	1	2	1	2
	1.28%	2.42%	0%	13.64%	0%	0%	1.11%	0%	0%	0%
I don"t know where it is/ I have never heard of it	**10**	3	0	6	0	0	1	0	0	0

Q38. Why do you not visit Seaford town centre, what improvements would make you visit it more often?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	422	**84**	**26**	**30**	**51**	**3**	**12**	**65**	**57**	**94**
	4.74%	7.14%	3.85%	10%	3.92%	0%	0%	4.62%	7.02%	1.06%
Difficult access by public transport	**20**	6	1	3	2	0	0	3	4	1
	0.24%	0%	0%	0%	1.96%	0%	0%	0%	0%	0%
Empty or closing down shops	**1**	0	0	0	1	0	0	0	0	0
	0.71%	1.19%	0%	0%	0%	0%	8.33%	0%	1.75%	0%
Expensive parking	**3**	1	0	0	0	0	1	0	1	0
	0.47%	0%	0%	0%	0%	0%	0%	1.54%	1.75%	0%
No department store	**2**	0	0	0	0	0	0	1	1	0
	0.47%	0%	0%	0%	1.96%	0%	0%	0%	1.75%	0%
No supermarket	**2**	0	0	0	1	0	0	0	1	0
	0.47%	0%	0%	0%	0%	0%	8.33%	0%	1.75%	0%
Not enough cafes, restaurants and pubs	**2**	0	0	0	0	0	1	0	1	0
	0.95%	0%	0%	0%	0%	0%	0%	3.08%	3.51%	0%
Not enough independent FOOD shops	**4**	0	0	0	0	0	0	2	2	0
	1.18%	1.19%	0%	0%	0%	0%	0%	3.08%	3.51%	0%
Not enough independent NON FOOD shops	**5**	1	0	0	0	0	0	2	2	0
	0.95%	0%	3.85%	0%	1.96%	0%	0%	0%	3.51%	0%
Not enough nationally known FOOD shops	**4**	0	1	0	1	0	0	0	2	0
	1.18%	1.19%	0%	0%	1.96%	0%	8.33%	0%	3.51%	0%
Not enough nationally known NON FOOD shops	**5**	1	0	0	1	0	1	0	2	0
	1.18%	1.19%	0%	0%	0%	0%	0%	6.15%	0%	0%
Not enough parking	**5**	1	0	0	0	0	0	4	0	0
	0.47%	0%	0%	0%	0%	0%	0%	1.54%	1.75%	0%
Poor quality independent FOOD shops	**2**	0	0	0	0	0	0	1	1	0
	0.47%	0%	0%	0%	0%	0%	0%	1.54%	1.75%	0%
Poor quality independent NON FOOD shops	**2**	0	0	0	0	0	0	1	1	0
	0.47%	0%	0%	0%	0%	0%	0%	1.54%	1.75%	0%
Poor quality nationally known FOOD shops	**2**	0	0	0	0	0	0	1	1	0
	0.47%	0%	0%	0%	0%	0%	0%	1.54%	1.75%	0%
Poor quality nationally known NON FOOD shops	**2**	0	0	0	0	0	0	1	1	0
	0.95%	0%	3.85%	6.67%	0%	0%	0%	1.54%	0%	0%
Other	**4**	0	1	2	0	0	0	1	0	0
	23.46%	10.71%	42.31%	43.33%	35.29%	0%	41.67%	16.92%	26.32%	18.09%
Too far away	**99**	9	11	13	18	0	5	11	15	17
	15.17%	13.10%	15.38%	6.67%	5.88%	33.33%	8.33%	12.31%	10.53%	29.79%
Don"t know	**64**	11	4	2	3	1	1	8	6	28
	45.97%	64.29%	30.77%	33.33%	47.06%	66.67%	25%	44.62%	28.07%	51.06%
No reason/ nothing	**194**	54	8	10	24	2	3	29	16	48

Q39. Why do you not visit Ringmer town centre, what improvements would make you visit it more often?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	855	**93**	**35**	**37**	**13**	**221**	**116**	**147**	**96**	**97**
	3.63%	6.45%	2.86%	5.41%	15.38%	2.71%	4.31%	3.40%	3.12%	1.03%
Difficult access by public transport	**31**	6	1	2	2	6	5	5	3	1
	0.35%	1.08%	0%	0%	0%	0%	0%	1.36%	0%	0%
Empty or closing down shops	**3**	1	0	0	0	0	0	2	0	0
	0.23%	0%	0%	0%	0%	0%	1.72%	0%	0%	0%
Expensive parking	**2**	0	0	0	0	0	2	0	0	0
	0.70%	1.08%	0%	2.70%	0%	0.45%	0.86%	0%	2.08%	0%
No department store	**6**	1	0	1	0	1	1	0	2	0
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.04%	0%
No separation of pedestrians and vehicles	**1**	0	0	0	0	0	0	0	1	0
	0.47%	0%	0%	2.70%	0%	0.90%	0%	0%	1.04%	0%
No supermarket	**4**	0	0	1	0	2	0	0	1	0
	0.58%	0%	0%	0%	7.69%	0.45%	0.86%	0%	2.08%	0%
Not enough cafes, restaurants and pubs	**5**	0	0	0	1	1	1	0	2	0
	0.82%	1.08%	2.86%	2.70%	7.69%	0.45%	0%	0.68%	1.04%	0%
Not enough independent FOOD shops	**7**	1	1	1	1	1	0	1	1	0
	0.94%	2.15%	2.86%	2.70%	7.69%	0%	0.86%	0.68%	1.04%	0%
Not enough independent NON FOOD shops	**8**	2	1	1	1	0	1	1	1	0
	1.17%	1.08%	2.86%	2.70%	15.38%	0.90%	2.59%	0%	0%	0%
Not enough nationally known FOOD shops	**10**	1	1	1	2	2	3	0	0	0
	1.52%	3.23%	2.86%	2.70%	15.38%	0.45%	3.45%	0.68%	0%	0%
Not enough nationally known NON FOOD shops	**13**	3	1	1	2	1	4	1	0	0
	0.23%	1.08%	0%	0%	0%	0%	0.86%	0%	0%	0%
Not enough parking	**2**	1	0	0	0	0	1	0	0	0
	0.47%	0%	0%	0%	0%	0.45%	0%	0%	3.12%	0%
Poor quality independent FOOD shops	**4**	0	0	0	0	1	0	0	3	0
	0.47%	0%	0%	0%	0%	0%	0.86%	0%	3.12%	0%
Poor quality independent NON FOOD shops	**4**	0	0	0	0	0	1	0	3	0
	0.23%	0%	0%	0%	0%	0%	0%	0%	2.08%	0%
Poor quality nationally known FOOD shops	**2**	0	0	0	0	0	0	0	2	0
	0.23%	0%	0%	0%	0%	0%	0%	0%	2.08%	0%
Poor quality nationally known NON FOOD shops	**2**	0	0	0	0	0	0	0	2	0
	0.94%	0%	5.71%	2.70%	0%	0.45%	1.72%	1.36%	0%	0%
Other	**8**	0	2	1	0	1	2	2	0	0
	29.36%	11.83%	31.43%	18.92%	15.38%	24.89%	44.83%	36.73%	42.71%	18.56%
Too far away	**251**	11	11	7	2	55	52	54	41	18
	14.04%	15.05%	11.43%	8.11%	0%	23.53%	6.03%	5.44%	7.29%	25.77%
Don"t know	**120**	14	4	3	0	52	7	8	7	25
	39.06%	54.84%	34.29%	43.24%	15.38%	36.65%	28.45%	40.14%	28.12%	54.64%

	Total									
No reason/ nothing	**334**	51	12	16	2	81	33	59	27	53
	4.44%	1.08%	2.86%	5.41%	0%	7.69%	2.59%	9.52%	0%	0%
I don''t know where it is/ I have never heard of it	**38**	1	1	2	0	17	3	14	0	0

Q40. In which Town Centre/Village do you visit <u>restaurants</u> most often?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	21.64%	11.30%	12.50%	4.76%	11.43%	6.42%	22.11%	50%	51.56%	24.66%
Brighton	**174**	13	4	2	8	12	21	63	33	18
	1.87%	0.87%	3.12%	4.76%	0%	0%	0%	0%	0%	15.07%
Burgess Hill	**15**	1	1	2	0	0	0	0	0	11
	0.62%	0%	0%	0%	0%	0%	0%	0%	0%	6.85%
Ditchling	**5**	0	0	0	0	0	0	0	0	5
	5.72%	1.74%	3.12%	0%	5.71%	13.90%	12.63%	0%	1.56%	0%
Eastbourne	**46**	2	1	0	4	26	12	0	1	0
	0.50%	0%	0%	0%	2.86%	1.07%	0%	0%	0%	0%
Hailsham	**4**	0	0	0	2	2	0	0	0	0
	0.87%	0%	0%	0%	0%	0%	0%	0%	0%	9.59%
Hassocks	**7**	0	0	0	0	0	0	0	0	7
	3.48%	0%	15.62%	23.81%	1.43%	0.53%	0%	0.79%	0%	13.70%
Haywards Heath	**28**	0	5	10	1	1	0	1	0	10
	0.12%	0%	0%	0%	0%	0%	0%	0%	1.56%	0%
Hove	**1**	0	0	0	0	0	0	0	1	0
	19.03%	64.35%	31.25%	14.29%	40%	6.42%	5.26%	4.76%	10.94%	6.85%
Lewes	**153**	74	10	6	28	12	5	6	7	5
	4.23%	0%	0%	2.38%	0%	1.07%	25.26%	3.97%	3.12%	0%
Newhaven	**34**	0	0	1	0	2	24	5	2	0
	0.62%	0.87%	3.12%	7.14%	0%	0%	0%	0%	0%	0%
Newick	**5**	1	1	3	0	0	0	0	0	0
	3.86%	1.74%	0%	0%	0%	2.67%	3.16%	16.67%	0%	0%
Peacehaven	**31**	2	0	0	0	5	3	21	0	0
	1.24%	0%	0%	0%	14.29%	0%	0%	0%	0%	0%
Ringmer	**10**	0	0	0	10	0	0	0	0	0
	0.50%	0%	0%	0%	0%	0%	0%	0.79%	4.69%	0%
Rottingdean	**4**	0	0	0	0	0	0	1	3	0
	0.62%	0%	0%	0%	0%	0%	0%	1.59%	4.69%	0%
Saltdean	**5**	0	0	0	0	0	0	2	3	0
	14.93%	1.74%	0%	2.38%	0%	48.13%	15.79%	5.56%	6.25%	1.37%
Seaford	**120**	2	0	1	0	90	15	7	4	1
	0.75%	0.87%	3.12%	7.14%	1.43%	0%	0%	0%	0%	0%
Uckfield	**6**	1	1	3	1	0	0	0	0	0
	0.25%	0%	0%	0%	0%	0%	1.05%	0%	0%	1.37%
Woodingdean	**2**	0	0	0	0	0	1	0	0	1
	15.55%	13.91%	21.88%	26.19%	12.86%	17.65%	13.68%	11.90%	14.06%	16.44%
* Don't Do/Varies	**125**	16	7	11	9	33	13	15	9	12
	2.49%	1.74%	6.25%	4.76%	8.57%	0.53%	1.05%	3.17%	1.56%	1.37%
Other	**20**	2	2	2	6	1	1	4	1	1
	0.75%	0.87%	0%	2.38%	1.43%	0%	0%	0.79%	0%	2.74%
Central London	**6**	1	0	1	1	0	0	1	0	2
	0.37%	0%	0%	0%	0%	1.60%	0%	0%	0%	0%
Alfriston	**3**	0	0	0	0	3	0	0	0	0

Q41. Which Town Centre/Village do you most often visit a <u>Pub or Bar</u>?
BY
Zone

	Total	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
	10.20%	4.35%	9.38%	0%	10%	3.21%	11.58%	19.84%	34.38%	4.11%
Brighton	**82**	5	3	0	7	6	11	25	22	3
	0.87%	0%	0%	2.38%	0%	0%	0%	0%	0%	8.22%
Burgess Hill	**7**	0	0	1	0	0	0	0	0	6
	1.74%	0%	3.12%	0%	0%	0%	0%	0%	0%	17.81%
Ditchling	**14**	0	1	0	0	0	0	0	0	13
	2.11%	1.74%	0%	0%	2.86%	4.28%	2.11%	1.59%	1.56%	0%
Eastbourne	**17**	2	0	0	2	8	2	2	1	0
	1.37%	0%	0%	0%	0%	0%	0%	0%	0%	15.07%
Hassocks	**11**	0	0	0	0	0	0	0	0	11
	1.62%	0.87%	9.38%	4.76%	0%	0%	0%	0%	0%	9.59%
Haywards Heath	**13**	1	3	2	0	0	0	0	0	7
	0.25%	0%	0%	0%	0%	0%	0%	0%	1.56%	1.37%
Hove	**2**	0	0	0	0	0	0	0	1	1
	13.56%	57.39%	18.75%	16.67%	17.14%	3.21%	5.26%	1.59%	1.56%	5.48%
Lewes	**109**	66	6	7	12	6	5	2	1	4
	2.74%	0%	0%	0%	0%	0.53%	18.95%	2.38%	0%	0%
Newhaven	**22**	0	0	0	0	1	18	3	0	0
	1.62%	0%	0%	30.95%	0%	0%	0%	0%	0%	0%
Newick	**13**	0	0	13	0	0	0	0	0	0
	3.23%	0%	0%	0%	0%	0%	2.11%	19.05%	0%	0%
Peacehaven	**26**	0	0	0	0	0	2	24	0	0
	1.99%	1.74%	0%	0%	18.57%	0.53%	0%	0%	0%	0%
Ringmer	**16**	2	0	0	13	1	0	0	0	0
	1.37%	0%	0%	0%	0%	0%	0%	2.38%	12.50%	0%
Rottingdean	**11**	0	0	0	0	0	0	3	8	0
	0.62%	0%	0%	0%	0%	0%	0%	0%	7.81%	0%
Saltdean	**5**	0	0	0	0	0	0	0	5	0
	12.19%	0.87%	0%	0%	0%	39.57%	15.79%	3.97%	4.69%	0%
Seaford	**98**	1	0	0	0	74	15	5	3	0
	0.25%	0%	0%	0%	2.86%	0%	0%	0%	0%	0%
Uckfield	**2**	0	0	0	2	0	0	0	0	0
	37.94%	31.30%	37.50%	21.43%	28.57%	44.92%	43.16%	46.03%	35.94%	30.14%
* Don't Do/Varies	**305**	36	12	9	20	84	41	58	23	22
	3.86%	0.87%	9.38%	21.43%	11.43%	3.21%	1.05%	1.59%	0%	1.37%
Other	**31**	1	3	9	8	6	1	2	0	1
	0.62%	0%	0%	0%	7.14%	0%	0%	0%	0%	0%
Firle	**5**	0	0	0	5	0	0	0	0	0

Plumpton Green	**0.62%**	0%	12.50%	0%	0%	0%	0%	0%	0%	1.37%
	5	0	4	0	0	0	0	0	0	1
Central London	**0.50%**	0.87%	0%	2.38%	1.43%	0%	0%	0%	0%	1.37%
	4	1	0	1	1	0	0	0	0	1
Alfriston	**0.37%**	0%	0%	0%	0%	0.53%	0%	1.59%	0%	0%
	3	0	0	0	0	1	0	2	0	0
Wivesfield Green	**0.37%**	0%	0%	0%	0%	0%	0%	0%	0%	4.11%
	3	0	0	0	0	0	0	0	0	3

Q42. Gender?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
Male	**32.59%**	32.17%	40.62%	38.10%	35.71%	31.02%	32.63%	38.89%	31.25%	17.81%
	262	37	13	16	25	58	31	49	20	13
Female	**67.41%**	67.83%	59.38%	61.90%	64.29%	68.98%	67.37%	61.11%	68.75%	82.19%
	542	78	19	26	45	129	64	77	44	60

Q43. Which of the following age groups do you belong to?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
18 - 24 years	**1.87%**	2.61%	0%	4.76%	5.71%	0%	2.11%	0%	3.12%	2.74%
	15	3	0	2	4	0	2	0	2	2
25 - 34 years	**6.09%**	5.22%	6.25%	9.52%	7.14%	6.42%	8.42%	7.94%	3.12%	0%
	49	6	2	4	5	12	8	10	2	0
35 - 44 years	**18.41%**	20.87%	18.75%	11.90%	11.43%	14.97%	24.21%	20.63%	20.31%	20.55%
	148	24	6	5	8	28	23	26	13	15
45 - 54 years	**23.13%**	26.96%	31.25%	23.81%	30%	19.79%	22.11%	23.02%	21.88%	17.81%
	186	31	10	10	21	37	21	29	14	13
55- 64 years	**19.65%**	18.26%	25%	21.43%	18.57%	19.79%	18.95%	19.84%	17.19%	21.92%
	158	21	8	9	13	37	18	25	11	16
65 +	**30.85%**	26.09%	18.75%	28.57%	27.14%	39.04%	24.21%	28.57%	34.38%	36.99%
	248	30	6	12	19	73	23	36	22	27

Q44. How many adults (aged over 16) , including yourself, live in your household?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
One	**24.63%**	22.61%	25%	7.14%	18.57%	27.81%	28.42%	19.84%	26.56%	36.99%
	198	26	8	3	13	52	27	25	17	27
Two	**54.85%**	48.70%	56.25%	66.67%	60%	58.82%	44.21%	61.11%	57.81%	42.47%
	441	56	18	28	42	110	42	77	37	31
Three	**12.69%**	18.26%	6.25%	14.29%	10%	9.09%	20%	12.70%	12.50%	8.22%
	102	21	2	6	7	17	19	16	8	6
Four	**5.97%**	6.09%	6.25%	11.90%	8.57%	2.67%	6.32%	5.56%	3.12%	10.96%
	48	7	2	5	6	5	6	7	2	8
Five or more	**1%**	1.74%	6.25%	0%	1.43%	1.07%	1.05%	0%	0%	0%
	8	2	2	0	1	2	1	0	0	0
(Refused)	**0.87%**	2.61%	0%	0%	1.43%	0.53%	0%	0.79%	0%	1.37%
	7	3	0	0	1	1	0	1	0	1

Q45. How many children (aged 16 and under) live in your household?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
One	**11.69%**	13.91%	0%	11.90%	10%	12.30%	11.58%	15.08%	12.50%	6.85%
	94	16	0	5	7	23	11	19	8	5
Two	**10.45%**	8.70%	12.50%	14.29%	8.57%	6.42%	11.58%	15.08%	10.94%	12.33%
	84	10	4	6	6	12	11	19	7	9
Three	**2.24%**	2.61%	6.25%	0%	4.29%	2.14%	1.05%	0.79%	3.12%	2.74%
	18	3	2	0	3	4	1	1	2	2
Four	**0.50%**	0%	0%	2.38%	0%	1.07%	0%	0%	0%	1.37%
	4	0	0	1	0	2	0	0	0	1
Five or more	**0.12%**	0%	0%	0%	0%	0%	0%	0%	0%	1.37%
	1	0	0	0	0	0	0	0	0	1
(Refused)	**1%**	0.87%	0%	0%	2.86%	1.07%	0%	1.59%	0%	1.37%
	8	1	0	0	2	2	0	2	0	1
None	**74%**	73.91%	81.25%	71.43%	74.29%	77.01%	75.79%	67.46%	73.44%	73.97%
	595	85	26	30	52	144	72	85	47	54

Q46. How many cars does your household own or have use of?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	**115**	**32**	**42**	**70**	**187**	**95**	**126**	**64**	**73**
One	**42.29%**	56.52%	25%	16.67%	30%	48.66%	42.11%	40.48%	35.94%	46.58%
	340	65	8	7	21	91	40	51	23	34
Two	**31.47%**	21.74%	40.62%	50%	50%	27.81%	25.26%	30.95%	35.94%	28.77%
	253	25	13	21	35	52	24	39	23	21
Three or more	**9.58%**	3.48%	21.88%	21.43%	12.86%	7.49%	9.47%	8.73%	6.25%	13.70%
	77	4	7	9	9	14	9	11	4	10
(Refused)	**1.12%**	1.74%	0%	0%	1.43%	0.53%	1.05%	2.38%	0%	1.37%
	9	2	0	0	1	1	1	3	0	1
None	**15.55%**	16.52%	12.50%	11.90%	5.71%	15.51%	22.11%	17.46%	21.88%	9.59%
	125	19	4	5	4	29	21	22	14	7

Q47. What is the employment status of the CHIEF INCOME EARNER in your household?
BY
Zone

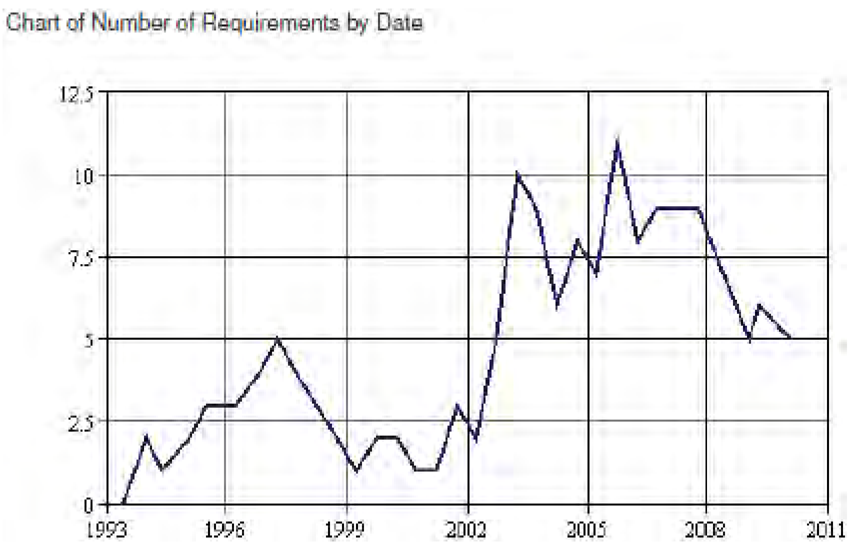
	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	115	32	42	70	187	95	126	64	73
	36.19%	39.13%	40.62%	40.48%	34.29%	29.41%	41.05%	38.89%	39.06%	32.88%
Employed full time	291	45	13	17	24	55	39	49	25	24
	7.46%	8.70%	3.12%	4.76%	10%	9.09%	9.47%	6.35%	3.12%	5.48%
Employed part time	60	10	1	2	7	17	9	8	2	4
	1.24%	0%	0%	2.38%	1.43%	1.07%	1.05%	1.59%	1.56%	2.74%
Housewife / husband	10	0	0	1	1	2	1	2	1	2
	11.82%	11.30%	12.50%	11.90%	24.29%	8.56%	9.47%	11.11%	7.81%	16.44%
Self employed	95	13	4	5	17	16	9	14	5	12
	3.86%	4.35%	3.12%	2.38%	1.43%	3.74%	6.32%	5.56%	1.56%	2.74%
Unemployed	31	5	1	1	1	7	6	7	1	2
	0.25%	0%	0%	0%	1.43%	0%	1.05%	0%	0%	0%
Student	2	0	0	0	1	0	1	0	0	0
	37.31%	33.91%	40.62%	38.10%	25.71%	45.99%	30.53%	32.54%	45.31%	39.73%
Retired	300	39	13	16	18	86	29	41	29	29
	1.87%	2.61%	0%	0%	1.43%	2.14%	1.05%	3.97%	1.56%	0%
(Refused)	15	3	0	0	1	4	1	5	1	0

Q48. In which of the following categories does your total household income fall?
BY
Zone

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	804	115	32	42	70	187	95	126	64	73
	10.82%	7.83%	6.25%	2.38%	8.57%	10.70%	16.84%	15.08%	7.81%	12.33%
Less than £10,000	87	9	2	1	6	20	16	19	5	9
	14.18%	17.39%	15.62%	9.52%	10%	16.04%	15.79%	11.90%	17.19%	9.59%
£10,000 - £20,000	114	20	5	4	7	30	15	15	11	7
	13.68%	7.83%	9.38%	9.52%	12.86%	17.65%	16.84%	19.05%	9.38%	8.22%
£20,000 - £30,000	110	9	3	4	9	33	16	24	6	6
	7.84%	9.57%	9.38%	0%	8.57%	8.02%	6.32%	7.14%	9.38%	9.59%
£30,000 - £40,000	63	11	3	0	6	15	6	9	6	7
	6.59%	9.57%	12.50%	9.52%	7.14%	4.81%	6.32%	3.97%	6.25%	6.85%
£40,000 - £50,000	53	11	4	4	5	9	6	5	4	5
	4.10%	5.22%	6.25%	7.14%	2.86%	1.07%	4.21%	4.76%	6.25%	5.48%
£50,000 - £60,000	33	6	2	3	2	2	4	6	4	4
	4.73%	4.35%	3.12%	19.05%	4.29%	2.67%	2.11%	3.17%	4.69%	9.59%
£60,000 - £100,000	38	5	1	8	3	5	2	4	3	7
	1.99%	1.74%	9.38%	7.14%	4.29%	0.53%	0%	0.79%	3.12%	1.37%
Over £100,000	16	2	3	3	3	1	0	1	2	1
	36.07%	36.52%	28.12%	35.71%	41.43%	38.50%	31.58%	34.13%	35.94%	36.99%
(Refused)	290	42	9	15	29	72	30	43	23	27

APPENDIX 3

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Lewes
Town Centre Diversity	Lewes is the principal shopping centre in Lewes District. The main shopping area is focused on the High Street, Cliffe High Street and the Friars/Eastgate Shopping Centre. The town centre has a diverse range of retail, retail service and other uses. A Waitrose supermarket (1,560 sqm net) is the main convenience anchor of the centre. This food offer is augmented by a health food shop, a bakery, a specialist cheese shop, a grocery shop, two delicatessens, off-licence/wine merchant and traditional convenience traders at the Riverside Hall shopping area. In addition, there is weekly food market on Market Street and a monthly farmers' market on Cliffe High Street. Comparison goods shopping opportunities are provided by a mix of national multiple and local independent traders which together provide a strong non-food offer. National multiples in the town include Waitrose, WH Smiths, Boots and Superdrug. Other multiple retailers include designer and high quality retailers such as Crew Clothing and East. Quality individual independent retailer representation in the centre is high in the comparison sector, particularly in jewellery, clothing, gifts and antiques. Food and drink catering provision within Lewes is strong with a good range and choice of eating and drinking establishments ranging from national coffee shop chains and independent artisan cafes to formal restaurants. Seaford has a range of national high street banks and building societies. The town centre also includes a range of professional and community services including accountants, solicitors and medical practitioners, a Post Office, combined emergency services/police station, health centres, library and art galleries.
Floorspace in edge-of-centre and out-of-centre locations.	The main shopping spine of the town extends at both ends (High Street and Cliffe High Street) beyond what we consider to be the primary shopping area. These parts of the town are characterised by smaller, non-standard historic units that are attractive to independent operators and include a higher proportion of A2, A3 and A4 uses than in the core shopping areas. These are considered to function well with the main part of the town and serve to add to the tourist attraction of Lewes. Malting Brook/Brooks Road represents the only significant floorspace outside the main town centre. This complex of retail development includes a Tesco store and recently opened Aldi store, together with a Homebase, Carpetright and Topps Tiles. The current Local Plan includes part of the Brooks Road complex (a 2,487 sqm net Tesco store) within the town centre boundary. However, it remains distinct from the centre, separated by Phoenix Causeway.
Potential capacity for growth or change	The historic fabric the makes up the main central area, together with the topography, mean that scope for growth is limited to the Eastgate area of the centre, comprising the Waitrose store and car park and the adjacent timber yard and car park. The existing retail in this area is poorly configured and has limited connection with the Friars on the main shopping street.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Lewes
	Any redevelopment of the site would therefore have to give careful consideration to improving this relationship to better integrate into the main shopping area. The dated bus station would also present a redevelopment opportunity to accommodate further retail floorspace and could potentially be linked into any redevelopment of the Eastgate area. However, this would require the reprovision of the existing bus station facilities, either within the site or on a suitable alternative site.
Retailer representation and intentions to change	As identified above, there is a reasonable level of representation from national multiple retailers within the town. Retailer demand registered with Focus-Costar shows a number of requirements comprising: • Edinburgh Woollen Mill, seeking 140 to 280 sqm of prime, in town floorspace; • Phase Eight, seeking 65 to 140 sqm of prime, in town floorspace; • Austin Reed, seeking 30 to 280 sqm of prime, in town floorspace; • Between The Lines, seeking 65 to 140 sqm of prime, in town floorspace; • Lloyds Pharmacy, seeking 'large retail units' prime, in town floorspace; • Jigsaw, seeking 75 to 140 sqm of prime, in town floorspace; • The Original Factory Shop, seeking 550 to 1,400sqm of secondary, edge or prominent main road located floorspace; • Mistral (fashion), seeking 70 to 115 sqm of prime or strong secondary, in town floorspace; • Card Factory UK, seeking 70 to 230sqm of prime, in town floorspace. The chart below extracted from the Focus Town Report for Lewes shows that retailer demand since 2005 has declined from a peak of 11 registered retailer requirements to 5 in 2010. 
Shopping rents	No published details are available to indicate the general retail rents in Lewes.

<table>
<tr><th>TOWN CENTRE VITALITY AND VIABILITY INDICATORS</th><th>Lewes</th></tr>
<tr><td>Vacancy rates</td><td>
Our survey of Lewes town centre in January 2012 identified 18 vacant units within the town centre. This is equivalent to a vacancy rate of 5.2%, which compares very favourably with the prevailing national vacancy rate of 14% and that of the south east region (12%).

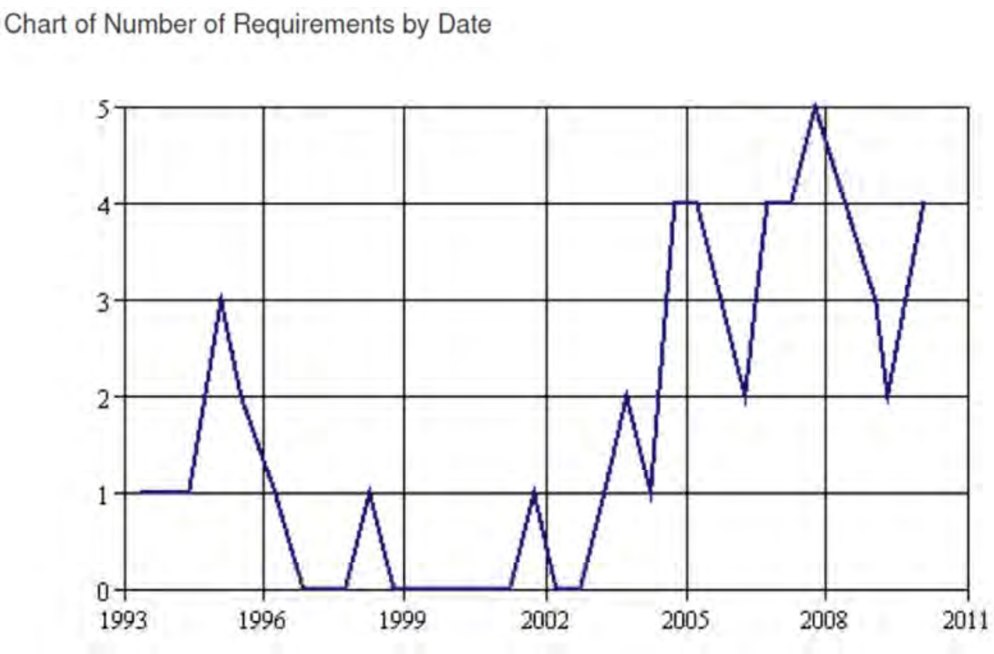
The vacant units are typically of limited size and were spread throughout the town, with the majority in more peripheral locations. The largest vacancy is adjacent to the bus station and has not previously been in retail use. However, given its location near to the prime retail pitch and opposity Waitrose, represents potential for retail use. Other than this, there are a number of vacant units at the lower end of the High Street. These represent ground floor units in historic townhouses that are often less attractive to multiple retailers; however, this part of the town is characterised by a substantial element of non-retail uses and vacancies in this location may reflect a normal level of ‘churn’.

The plan below shows the location of the vacant units (coloured red) within the town centre in January 2012.

</td></tr>
<tr><td>Commercial yields</td><td>No published retail property transaction details are available to indicate the yield achieved on retail properties in Lewes.</td></tr>
<tr><td>Land values</td><td>No published details are available to indicate retail land values in Lewes.</td></tr>
</table>

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Lewes
Safety and crime	On the basis of a number of visits to Lewes, the town centre appears safe. However, stakeholders have reported a degree of vandalism within the centre itself. We have not analysed crime statistics for Lewes.
Environmental quality	The environmental quality of Lewes is high and it is located entirely within the South Downs National Park. The historic fabric of the centre, including conservation areas and listed buildings, coming together to create a pleasant shopping environment which is a major strength of the centre and adds to its wider attraction to visitors. The town centres built fabric is generally good and there are some areas of open space around the town. Although there is a degree of traffic in the town centre, the main road (A26) skirts the central area. Thus traffic flows in the centre are limited mainly local traffic, with a one-way system in operation controlling the flows of traffic. This, together with the pedestrianised focus of the shopping area results in limited pedestrian and vehicle conflicts.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Seaford
Town Centre Diversity	Seaford is identified as one of the main shopping centres in Lewes District. Seaford's shopping area is based upon Broad Street, High Street, Sutton Road, Clinton Place, Sutton Park Road, Dane Road, Church Street and Place Lane. The primary shopping area is focused upon Broad Street. The town centre has a diverse range of retail, retail service and other uses. A Morrisons supermarket (Dane Road) provides a good anchor to the town centre and convenience goods shopping is also provided by a Tesco Express convenience store, a Co-Op supermarket and a range of smaller traditional convenience goods retailers including a butcher, two bakers, a delicatessen, fishmonger, greengrocer, health food store, off-licence and CTN's. Comparison goods shopping is provided by a mix of national multiple and local independent traders which together provide reasonable coverage of non-food goods. National multiples include WH Smith, Superdrug, M & Co, Stead & Simpson, Boots the Chemist, Specsavers and Brewers. Independent traders provide a range of comparison goods shopping and there are a notable number of antique and gift shops. Food and drink/catering provision within the town centre is considered to provide shoppers and visitors with a good choice with a range and mix of cafes, restaurants, pubs and take-away outlets. Seaford has a range of national high street banks and building societies.. Other uses within and around the town centre which add to the overall diversity of Seaford include a number of smaller professional services offices occupied by accountants, solicitors and medical practitioners, a Post Office counter and depot, combined emergency services/police station, health centres, library and art gallery.
Floorspace in edge-of-centre and out-of-centre locations.	There are no edge or out-of-centre retail warehouse or superstore developments in the Seaford area. The closest retail park/superstores are at Newhaven comprising the Drove Retail Park (Halfords, Carpet Right, Pets At Home, B&Q and McDonalds) and adjacent Lidl and Original Factory Shop units, together with Sainsbury superstore. These facilities are approximately 4km drive to the west of Seaford.
Potential capacity for growth or change	Seaford's main shopping area is compact and relatively constrained by surrounding predominately residential areas and open space/recreation facilities. There is limited potential for expansion to Seaford's existing retail area.
Retailer representation and intentions to change	There are some national multiple retailers within the town, these are identified above. Retailer demand registered with Focus-Costar shows three requirements comprising: • C&H Fabrics, seeking 230 to 460sqm of prime, in town floorspace.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	**Seaford**
	• The Original Factory Shop, seeking 550 to 1,400sqm of secondary, edge or prominent main road located floorspace. • Card Factory UK, seeking 70 to 230sqm of prime, in town floorspace. Although not confirmed, it is likely that the Original Factory store requirement will have been met by their recent occupation of an out of centre store at Newhaven. The chart below extracted from the Focus Town Report for Seaford shows that retailer demand since 2005 has been relatively low but stable at between 2 and 5 registered retailer requirements. 
Shopping rents	No published details are available to indicate the general retail rental tone in Seaford.
Vacancy rates	Our survey of Seaford town centre in January 2012 identified 17 vacant units within the town centre. This is equivalent to a vacancy rate of 7.2%, which compares favourably with the prevailing national vacancy rate of 14% and that of the south east region (12%). The vacant units were spread throughout the town. Three vacant units were on Broad Street, which we consider to be Seaford's main shopping street. Higher numbers of vacant units were on High Street where a concentration of three adjoining units (No's 19 to 23) we being renovated/refurbished. The plan below shows the location of the vacant units (coloured red) within Seaford town centre as at January 2012.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Seaford
	
Commercial yields	No published retail property transaction details are available to indicate the yield achieved on retail properties in Seaford.
Land values	No published details are available to indicate retail land values in Seaford.
Pedestrian flows	Pedestrian movement and activity in the town appears viable. The busiest shopping area is Broad Street. The Morrisons food store is busy and there is evidence of shoppers linking trips from this store with the rest of the town centre.
Accessibility	Accessibility to Seaford is good; there are a number of bus services linking the town with the surrounding residential areas and the wider area and nearby settlements. Bus stops serving the town centre are located on Sutton Park Road and Station Approach. Seaford railway station which is a terminus, is located on the north western edge of the town centre. The railway provides direct train services to Newhaven, Lewes and Brighton Off street car parking serving Seaford town centre comprises four pay and display car parks located around the edge of the town at Sutton Road, Richmond Road (off Dane Road), West Street and Saxon Way which have a combined capacity of approximately 280 spaces. Additional time limited

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Seaford
	customer car parking is provided below the Morrisions store accessed from West Street (capacity 140 spaces approx.). On street car parking is available around the town centre and the seafront/Esplanade area to the south of the town centre provides more car parking opportunities for visitors. Whilst there is a relatively good level of car parking within Seaford, it is not well signposted, similarly routes between the Esplanade and the town centre are not particularly legible.
A11 - Customer and residents' views and behaviour	The household survey identified food and non-food shopping as the main reasons for visiting Seaford. In terms of satisfaction with the centre and the improvements that respondents to the household telephone survey felt would make them visit more often, the results show a good level of satisfaction with the centre at present (51%) although more/better car parking and improved shopping did feature as improvements sought.
A12 - Safety and crime	On the basis of a number of visits to Seaford, we have found the town centre to provide a safe shopping environment. There is very little evidence of vandalism. We have not analysed crime statistics for Seaford.
A13 - Environmental quality	The environmental quality of Seaford is good. The town centres built fabric is generally good and there are some areas of open space around the town. Within the town centre there are a number of listed buildings and a Conservation Area covers most of the town centre area. Whilst the town centre is subject to traffic flows, this does not detract from the shopping experience and there is little evidence of conflict arising between pedestrians and vehicles.

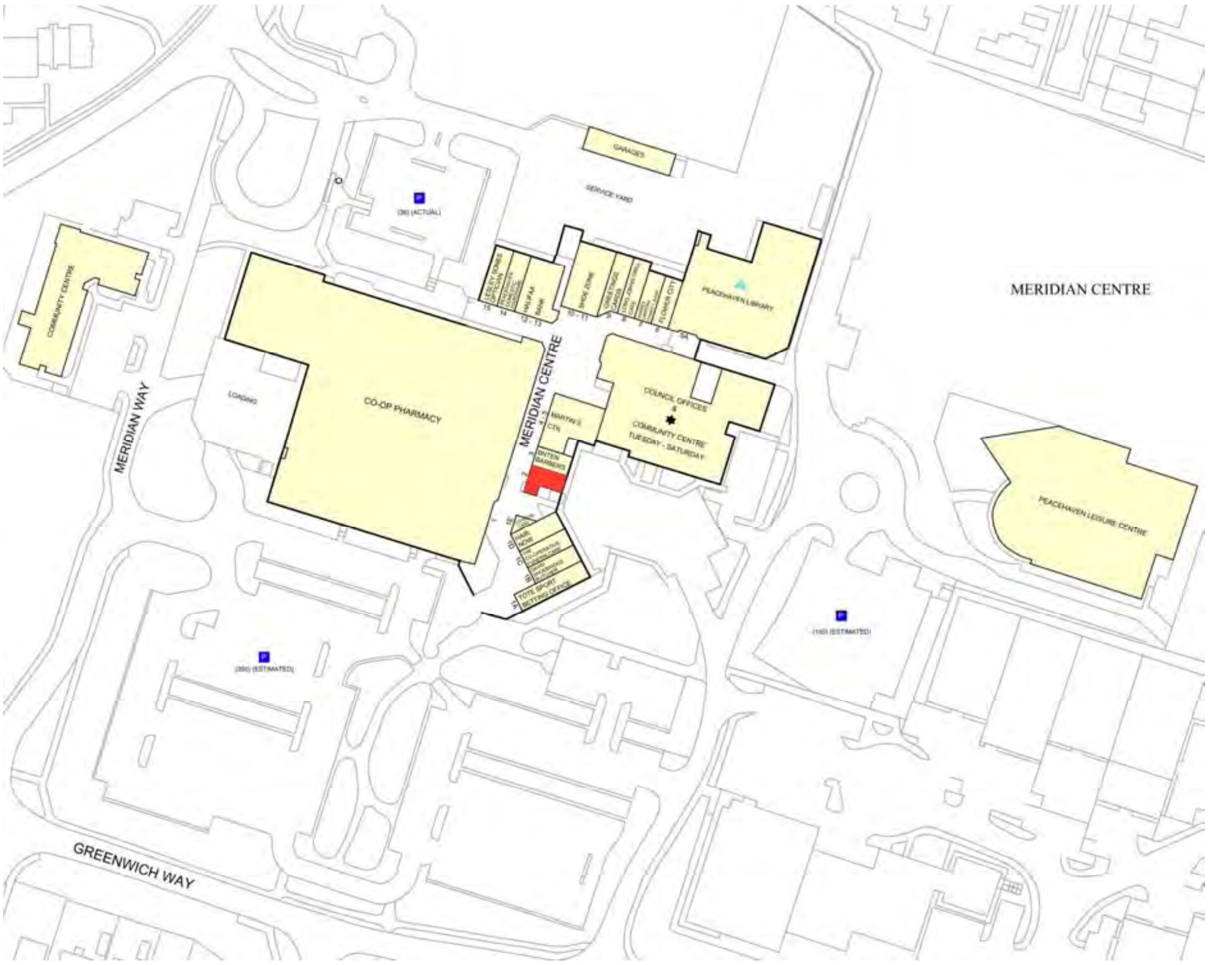
TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Newhaven
A1 - Diversity	Newhaven is identified as one of the main shopping centres in the District. The primary shopping area is focused around the High Street and Newhaven Square, anchored by a 1,500 sqm (net) Co-op supermarket. Beyond the Co-op, there are a number of limited top-up convenience opportunities. The Co-op is the main attractor to the town centre; however, the location of the store is not prominent and is poorly related to the rest of the centre. In comparison terms, the centre has limited offer, underpinned by Peacocks, Poundstretcher and a small Boots. Following the closure of Woolworths (now reoccupied as Poundstretcher), there is no significant comparison anchor to the centre. The comparison attraction of the centre has reduced, as evidenced by the closure of M & Co last year. Furthermore, there is a relatively high proportion of charity shops.
A2 - Floorspace in edge-of-centre and out-of-centre locations.	An out-of-centre retail park comprising Halfords, Carpet Right, Pets At Home, B&Q and McDonalds is located to the east of the town centre. This has been recently expanded to include a Lidl and Original Factory Shop on adjacent land. We estimate that these two retail parks accommodate in the order of 5,000 sqm net sales area. Additionally, there is a 2,900 sqm (net) Sainsbury's located to the north of the A259, which has permission to extend by a further 1,937 sqm net. The household survey results indicate that the retail parks trade well and it is possible that many local residents now conflate the retail parks with the town centre itself.
A3 - Potential capacity for growth or change	The town centre is contained by North Way/South Way ring road. This limits the scope for extension to the immediate primary shopping area. The multi-storey car park adjacent to Newhaven Square is currently poorly configured, as is Newhaven Square itself, and could be consolidated. However, by virtue of the road network, the centre itself has limited visibility to customers and it is doubtful whether such a reconfiguration would prove commercially attractive, given the presence of the existing and proposed out-of-centre retail provision. The proposed development at Railway Quay offers some potential for a refocusing of the town centre. However, this is dependent on securing strong linkages with the existing core to ensure it does not act as a standalone destination, in the same way as the existing retail parks.
A4 - Retailer representation and	There is limited retailer representation by national multiples within the town centre (Co-op, Boots and Peacocks). It is notable that M & Co have recently withdrawn from the

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Newhaven
intentions to change	centre; this, combined with the disappearance of Woolworths, has further reduced multiple representation. There does not appear to be any imminent prospect of the in-centre offer being enhanced. Conversely, the out-of-centre multiple presence is much stronger, with Sainsbury's and Lidl in convenience terms, as well as comparison retailers including B&Q, Carpet Right and Halfords.
A5 - Shopping rents	There is no data available on shopping rents.
A6 - Vacancies	 An updated GOAD plan indicates there are 10 vacant units within the main town centre. These are located through the centre, with no particular concentrations. It is notable that there are two large vacant units on the High Street (590 sqm and 330 sqm), together with another unit in Newhaven Square. These represent prime retail opportunities in the town and, when considered in conjunction with existing retail provision in the centre, suggest these vacancies could become long term despite representing relatively modern, large floorplate retail floorspace for this size centre.
A7 - Commercial	There is no published data available for Newhaven

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Newhaven
yields	
A8 - Land values	There is no published data available for Newhaven
A9 - Pedestrian flows	Pedestrian activity in the town appears low. The combination of the limited offer within the centre and the co-location of the Co-op with the multi-storey car park further reduces footfall in the centre as a whole. The out-of-centre retail parks are within walking distance of the town centre; however, the route is not pleasant, alongside a major road, and does not appear to be well-used.
A10 - Accessibility	The local residential area is served by a frequent bus route (145). Further regular services link Newhaven with Brighton, Eastbourne and Lewes, stopping both in the town centre and also at the out-of-centre retail stores. Newhaven Town station is located 450m from the primary shopping area. The station is served by half-hourly trains to Seaford, Lewes and Brighton. However, the quality of the linkage between the station and the town centre is not high. In addition, two main car parks serve the town centre (Dacre Road 180 spaces and Lower Place 64 spaces). Both are run by the District Council and a standardised charging regime is in place.
A11 - Customer and residents' views and behaviour	The household survey identified food and non-food shopping comprise the main reasons for visiting Newhaven. However, on the basis of the low footfall in the centre itself and within the shops, it is considered that survey is likely to have overstated the role the centre plays, particularly when considered against the role the retail parks in meeting both convenience and comparison shopping needs. Discussions with local shopkeepers suggest that the trade within the centre is low and that the perception is of there being no reason to visit the town. Deficiencies in shopping provision (27%) and the need to improve shopping facilities (51%) in the centre scored highly amongst respondents in the household survey. No other centre in District polled this low in these categories.
A12 - Safety and crime	Given the limited traffic flows in the centre itself, there is only limited natural surveillance of most of the central area. Furthermore, the main town centre car park is multi-storey and is considered a less attractive option for those using the centre. The evening economy in the centre is limited to a few pubs. As such, it is expected that footfall in the town is very low at night time.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Newhaven
	Whilst there was no obvious evidence of crime or vandalism, the quiet atmosphere in the town itself is not considered conducive to creating the perception of a safe town centre and is likely to discourage people from visiting the centre.
A13 - Environmental quality	The creation a pedestrianised High Street in Newhaven has improved the environment for those shopping in the centre. However, the High Street itself does not include any historic buildings or other physical attributes that significant enhance the quality of the centre. Furthermore, the inward looking nature of the centre mean that there is no connection with the marina area. The parking opportunities do not improve the situation for the centre.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Peacehaven Meridian Centre
Town Centre Diversity	The Meridain Centres shopping area is contained within a purpose built covered shopping centre. The centre is accessed from Meridian Way/Greenwich Way/Sutton Aveneue to the north of South Coast Road (A259) a busy coastal route connecting with Brighton to the west and Newhaven, Seaford and Eastbourne to the east. The shopping centre is anchored by a Co-Op supermarket which incorporates an instore pharmacy, café and Peacocks clothing concession. In addition to the Co-Op there are 16 smaller unit shops occupied by convenience (butcher, CTN); comparison (florist, charity, shoes, hardware, greetings cards) and service (bookmakers, funeral services, hair salon, barbers, taxi office, opticians, bank and café) outlets. Other uses within and around the Meridian Centre include Council Offices, Community Centre, Library, Leisure Centre and Health Care.
Floorspace in edge-of-centre and out-of-centre locations.	There are no edge or out-of-centre retail warehouse or superstore developments in the Peacehaven area. The South Coast Road shopping area is within a reasonable walking distance of being approximately 700m to the south. The closest retail park/superstores are at Newhaven comprising the Drove Retail Park (Halfords, Carpet Right, Pets At Home, B&Q and McDonalds) and adjacent Lidl and Original Factory Shop units, together with Sainsbury superstore. These facilities are approximately 4.5km drive to the east of Peacehaven.
Potential capacity for growth or change	Peacehaven Meridian Centre is fully enclosed. Surrounding the centre there are areas of surface level car parking which could present opportunities for expansion.
Retailer representation and intentions to change	National multiple retailer within the centre include: Co-Op, Peacocks, Shoe Zone and Martin's CTN. There is no registered retailer demand for Peacehaven on the Focus-Costar retailer demand database.
Shopping rents	No published details are available to indicate the general retail rental tone in the Meridian Centre.
Vacancy rates	Our survey of the Meridian Centre in January 2012 identified 1 vacant unit. This is equivalent to a vacancy rate based upon the total number of units of 6.25%, which compares favourably with the prevailing national vacancy rate of 14% and that of the south east region (12%). The plan below shows the location of the vacant units (coloured red) within Peacehaven South Coast Road centre as at January 2012.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	**Peacehaven Meridian Centre**
	
Commercial yields	No published retail property transaction details are available to indicate the yield achieved on retail properties at the Meridian Centre.
Land values	No published details are available to indicate retail land values in Peacehaven.
Pedestrian flows	The Meridian Centre is reasonably busy with viable levels of footfall.
Accessibility	Accessibility to the Meridian Centre is good, with clear signposting to the centre provided from the A259. There are a number of bus services linking with the surrounding residential areas and the wider area and nearby settlements. Off street car parking serving the Meridian Centre comprises extensive off-street facilities with capacity for approximately 400 cars. Additional off street car parking is also located nearby serving the Leisure Centre.
Customer and	The household survey identified food (main and top-up) shopping as the main reasons for visiting the Meridian

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Peacehaven Meridian Centre
residents' views and behaviour	Centre. In terms of satisfaction with the centre and the improvements that respondents to the household telephone survey felt would make them visit more often, the results show improved shopping as the main improvement sought although no change was the strongest response.
Safety and crime	On the basis of a number of visits to the Meridian Centre, we have found the centre to provide a safe shopping environment, with visible security measures. We have not analysed crime statistics for Peacehaven.
Environmental quality	The environmental quality of The Meridian Centre is good, although the shopping centre is little dated. The car parking areas serving the centre are landscaped to a good standard and are well maintained. .

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Peacehaven South Coast Road/Telscombe Cliffs
Town Centre Diversity	Peacehaven South Coast Road's shopping area is based upon South Coast Road (A259) a busy coastal route connecting with Brighton to the west and Newhaven, Seaford and Eastbourne to the east. The shopping area of Peacehaven Couth Coast Road is very elongated linear centre extending over 1km and there is no particular focus of retailing activity. In terms of retailing, convenience shopping floorsapce is relatively limited and focused primarily upon top-up and pass by trade. The main convenience retailers within South Coast Road are Sainsbury Local, Nisa Conveneince Store and a modest range of other convenience stores including CTN's, off licence, cake decorating supplies, but no butchers, bakers or greengrocers. Comparison goods shopping is also relatively limited with a large proportion of units occupied by charity and second hand goods stores. There is also some specialist and niche retail including an angling/fishing tackle shop and an independent retailer (QDA Domestic Appliances) occupying a large unit retailing white goods/AV and electriconics. There are no national multiple comparison goods traders at South Coast Road. The main activity on South Coast Road is retail service and quasi retail uses with a range of food and drink/catering provision comprising a mix of cafes, restaurants, pubs and take-away outlets. Peacehaven South Coast Road has branches of Barclays and Nat West high street banks. Other professional and financial services include a number of estate agents and offices of solicitors and accountants. Other uses within and around the South Coast Raod Area include a number of residential properties, car sales, light industrial units and offices.
Floorspace in edge-of-centre and out-of-centre locations.	There are no edge or out-of-centre retail warehouse or superstore developments in the Peacehaven area. The Meridian Centre, Peacehaven is within a reasonable walking distance of South Coast Road being approximately 700m to the north. The closest retail park/superstores are at Newhaven comprising the Drove Retail Park (Halfords, Carpet Right, Pets At Home, B&Q and McDonalds) and adjacent Lidl and Original Factory Shop units, together with Sainsbury superstore. These facilities are approximately 4.5km drive to the east of Peacehaven.
Potential capacity for growth or change	Peacehaven South Coast Road's shopping area lacks focus and a contraction and concentration rather than growth would be appropriate.
Retailer representation and intentions to change	The only national multiple retailer within the centre is Sainsbury who recently opened a Local format convenience store, there is also a franchised/symbol retailer Nisa. National multiple service operators include Blockbuster and a Subway franchise. There is no registered retailer demand for Peacehaven on the Focus-Costar retailer demand database.
Shopping rents	No published details are available to indicate the general retail rental tone in Peacehaven.

<table>
<tr><th>TOWN CENTRE VITALITY AND VIABILITY INDICATORS</th><th>Peacehaven South Coast Road/Telscombe Cliffs</th></tr>
<tr><td>Vacancy rates</td><td>
Our survey of Peacehaven South Coast Road in January 2012 identified 7 vacant units within the town centre. This is equivalent to a vacancy rate of around 10%, which compares favourably with the prevailing national vacancy rate of 14% and that of the south east region (12%).

The vacant units were spread throughout the town.

The plan below shows the location of the vacant units (coloured red) within Peacehaven South Coast Road centre as at January 2012.

South Coast Rd, Peacehaven – Eastern End

South Coast Rd, Peacehaven – Western End
</td></tr>
<tr><td>Commercial yields</td><td>No published retail property transaction details are available to indicate the yield achieved on retail properties at South Coast Road.</td></tr>
<tr><td>Land values</td><td>No published details are available to indicate retail land values in Peacehaven.</td></tr>
</table>

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	Peacehaven South Coast Road/Telscombe Cliffs
Pedestrian flows	South Coast Road is relatively quiet in terms of pedestrian activity. The eastern end of the centre is the busiest.
Accessibility	Accessibility to South Coast Road is good as it lies on the A259. There are a number of bus services linking the town with the surrounding residential areas and the wider area and nearby settlements. Bus stops serving the South Coast Road area of Peacehaven town centre are located along the A259. Off street car parking serving Peacehaven South Coast Road centre comprises three council operated car parks accessed off the A259, in total they have capacity for approximately 110 cars. Additional time limited on street car parking is permitted along parts of South Coast Road.
Customer and residents' views and behaviour	The household survey identified food (top-up) shopping as the main reasons for visiting South Coast Road. In terms of satisfaction with the centre and the improvements that respondents to the household telephone survey felt would make them visit more often, the results show improved shopping as the main improvement sought although no change was the strongest response.
Safety and crime	On the basis of a number of visits to Peacehaven South Coast Road, we have found the centre to provide a safe shopping environment, although there is some pedestrian/vehicular conflict. There is very little evidence of vandalism. We have not analysed crime statistics for Pacehaven.
Environmental quality	The environmental quality of South Coast Road is at best varied. Some more recent developments including the Sainsbury Local are of good quality, whilst a number of parts of the centre present a run-down and somewhat unkempt appearance. Through traffic flows also impact upon the shopping experience.

APPENDIX 4

Study Area

Study Zones

Drawing Title

Study Area Plan

Job Title

Lewes District Shopping and Town Centre Report

Client

Lewes District Council

Scale	1: 150,000
Date	April 2012
Job No	J026663
Drawn By	JP
Authorised By	AJ

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APPENDIX 5

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

List of Tables

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table A: **Study Area Population Estimates**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
2001	15,721	3,927	5,714	7,084	22,947	12,429	17,560	7,838	9,575	102,795
2011	17,174	3,845	5,872	7,058	24,107	13,515	18,785	8,607	9,602	108,565
2012	17,177	3,846	5,873	7,059	24,111	13,517	18,788	8,608	9,604	108,584
2016	17,189	3,848	5,877	7,064	24,128	13,527	18,801	8,614	9,610	108,659
2021	17,167	3,843	5,869	7,055	24,097	13,509	18,777	8,603	9,598	108,518
2026	17,194	3,849	5,879	7,066	24,135	13,531	18,807	8,617	9,613	108,692
2030	17,216	3,854	5,886	7,075	24,166	13,548	18,831	8,628	9,626	108,831

Notes: Population based upon 2010 to 2026 policy based projections produced by East Sussex in Figures (ESiF)

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table B: **Study Area Conveneince Goods Expenditure Per Head Estimates**

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
All Conveneince Goods	100%									
2010		2152	2317	2308	2183	2104	1961	1996	2187	2321
2011		*£2,163*	*£2,329*	*£2,320*	*£2,194*	*£2,115*	*£1,971*	*£2,006*	*£2,198*	*£2,333*
2012		£2,174	£2,340	£2,331	£2,205	£2,125	£1,981	£2,016	£2,209	£2,344
2016		£2,217	£2,387	£2,378	£2,249	£2,168	£2,021	£2,057	£2,253	£2,392
2021		£2,273	£2,448	£2,438	£2,306	£2,223	£2,072	£2,109	£2,310	£2,452
2026		£2,331	£2,509	£2,500	£2,364	£2,279	£2,124	£2,162	£2,369	£2,514
2030		£2,378	£2,560	£2,550	£2,412	£2,325	£2,167	£2,205	£2,416	£2,564
Main Foood	70%									
2011		*£1,514*	*£1,630*	*£1,624*	*£1,536*	*£1,480*	*£1,380*	*£1,404*	*£1,539*	*£1,633*
2012		*£1,522*	*£1,638*	*£1,632*	*£1,543*	*£1,488*	*£1,386*	*£1,411*	*£1,546*	*£1,641*
2016		*£1,552*	*£1,671*	*£1,665*	*£1,575*	*£1,518*	*£1,414*	*£1,440*	*£1,577*	*£1,674*
2021		*£1,591*	*£1,713*	*£1,707*	*£1,614*	*£1,556*	*£1,450*	*£1,476*	*£1,617*	*£1,716*
2026		*£1,632*	*£1,757*	*£1,750*	*£1,655*	*£1,595*	*£1,487*	*£1,513*	*£1,658*	*£1,760*
2030		*£1,664*	*£1,792*	*£1,785*	*£1,688*	*£1,627*	*£1,517*	*£1,544*	*£1,691*	*£1,795.12*
Top-Up Food	30%									
2011		*£648.83*	*£698.58*	*£695.86*	*£658.17*	*£634.36*	*£591.24*	*£601.79*	*£659.38*	*£699.78*
2012		*£652.07*	*£702.07*	*£699.34*	*£661.47*	*£637.53*	*£594.20*	*£604.80*	*£662.68*	*£703.28*
2016		*£665.21*	*£716.22*	*£713.43*	*£674.79*	*£650.37*	*£606.17*	*£616.99*	*£676.03*	*£717.45*
2021		*£682.01*	*£734.30*	*£731.45*	*£691.83*	*£666.80*	*£621.48*	*£632.57*	*£693.10*	*£735.57*
2026		*£699.23*	*£752.84*	*£749.92*	*£709.30*	*£683.63*	*£637.17*	*£648.54*	*£710.60*	*£754.14*
2030		*£713.32*	*£768.01*	*£765.03*	*£723.60*	*£697.41*	*£650.01*	*£661.61*	*£724.92*	*£769.34*

Notes: Sourced from MMG3 Retail Planner 2011, Experian Business Strategies
Base year is 2011 in 2011 price base.
Expenditure growth is derived from Retail Planner Briefing Note 9 (September 2011) and uses long term growth projections from 2012 (Figure 2)
Main food and top up food spend split is 70:30.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table C: **Study Area Conveneince Goods Expenditure Generated**

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
All Conveneince Goods		£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
2001											
2011		£37.14	£8.95	£13.62	£15.48	£50.97	£26.64	£37.68	£18.92	£22.40	£231.81
2012		£37.34	£9.00	£13.69	£15.56	£51.24	£26.77	£37.88	£19.02	£22.51	£233.01
2016		£38.11	£9.19	£13.98	£15.89	£52.31	£27.33	£38.67	£19.41	£22.98	£237.87
2021		£39.03	£9.41	£14.31	£16.27	£53.56	£27.99	£39.59	£19.88	£23.53	£243.56
2026		£40.08	£9.66	£14.70	£16.71	£55.00	£28.74	£40.66	£20.41	£24.17	£250.11
2030		£40.94	£9.87	£15.01	£17.07	£56.18	£29.35	£41.53	£20.85	£24.68	£255.48
Growth in Expenditure Potential 2011-2016		£0.97	£0.23	£0.36	£0.40	£1.33	£0.70	£0.98	£0.49	£0.59	£6.06
Growth in Expenditure Potential 2011-2021		£1.88	£0.45	£0.69	£0.78	£2.58	£1.35	£1.91	£0.96	£1.14	£11.75
Growth in Expenditure Potential 2011-2026		£2.93	£0.71	£1.08	£1.22	£4.02	£2.10	£2.97	£1.49	£1.77	£18.30
Growth in Expenditure Potential 2011-2030		£3.79	£0.91	£1.39	£1.58	£5.20	£2.72	£3.85	£1.93	£2.29	£23.67
Main Foood	70%										
2011		*£26.00*	*£6.27*	*£9.53*	*£10.84*	*£35.68*	*£18.64*	*£26.38*	*£13.24*	*£15.68*	£162.27
2012		*£26.13*	*£6.30*	*£9.58*	*£10.90*	*£35.87*	*£18.74*	*£26.51*	*£13.31*	*£15.76*	£163.11
2016		*£26.68*	*£6.43*	*£9.78*	*£11.12*	*£36.61*	*£19.13*	*£27.07*	*£13.59*	*£16.09*	£166.51
2021		*£27.32*	*£6.59*	*£10.02*	*£11.39*	*£37.49*	*£19.59*	*£27.71*	*£13.91*	*£16.47*	£170.49
2026		*£28.05*	*£6.76*	*£10.29*	*£11.69*	*£38.50*	*£20.12*	*£28.46*	*£14.29*	*£16.92*	£175.08
2030		*£28.65*	*£6.91*	*£10.51*	*£11.95*	*£39.33*	*£20.55*	*£29.07*	*£14.59*	*£17.28*	£178.83
Top-Up Food	30%										
2011		*£11.14*	*£2.69*	*£4.09*	*£4.65*	*£15.29*	*£7.99*	*£11.30*	*£5.68*	*£6.72*	£69.54
2012		*£11.20*	*£2.70*	*£4.11*	*£4.67*	*£15.37*	*£8.03*	*£11.36*	*£5.70*	*£6.75*	£69.90
2016		*£11.43*	*£2.76*	*£4.19*	*£4.77*	*£15.69*	*£8.20*	*£11.60*	*£5.82*	*£6.89*	£71.36
2021		*£11.71*	*£2.82*	*£4.29*	*£4.88*	*£16.07*	*£8.40*	*£11.88*	*£5.96*	*£7.06*	£73.07
2026		*£12.02*	*£2.90*	*£4.41*	*£5.01*	*£16.50*	*£8.62*	*£12.20*	*£6.12*	*£7.25*	£75.03
2030		*£12.28*	*£2.96*	*£4.50*	*£5.12*	*£16.85*	*£8.81*	*£12.46*	*£6.25*	*£7.41*	£76.64

Notes: Product of population (Table A) and expenditure per head (Table B)

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table D: **Convenience Main Food Shopping Patterns (Combined/Weighted)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Waitrose, Lewes	28.95%	24.00%	4.81%	23.84%	0.23%	1.17%	1.06%	0.78%	1.80%	**7.85%**
Local Stores, Lewes TC	3.77%	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.55%**
LEWES TOWN CENTRE										
Tesco, Lewes	48.07%	26.67%	12.93%	43.17%	0.12%	2.84%	0.65%	1.64%	0.35%	**12.82%**
Aldi, Lewes	4.93%	5.00%	2.90%	3.07%	0.00%	0.00%	0.00%	0.39%	0.00%	**1.35%**
Local Stores, Lewes Not In Town Centre	1.19%	1.33%	0.00%	1.54%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.32%**
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	0.70%	0.00%	0.00%	0.39%	50.27%	8.72%	2.76%	0.78%	0.00%	**13.45%**
Local Stores , Seaford	0.00%	0.00%	0.00%	0.00%	3.85%	0.00%	0.00%	0.00%	0.00%	**0.95%**
Tesco Express, Seaford	0.00%	0.00%	0.00%	0.00%	2.28%	0.00%	0.00%	0.00%	0.00%	**0.61%**
Co-Op, Broad Street, Seaford	0.00%	0.00%	0.00%	0.00%	4.11%	0.00%	0.00%	0.00%	0.00%	**1.04%**
Cost Cutter, Princes Drive, Seaford	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.00%	0.00%	**0.06%**
SEAFORD										
Co-Op, Newhaven	0.00%	2.50%	0.00%	0.00%	0.35%	14.61%	0.63%	0.39%	0.00%	**1.98%**
Local Stores, Newhaven	0.00%	0.00%	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	**0.10%**
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	0.95%	7.67%	0.00%	4.22%	22.85%	56.72%	24.41%	23.99%	0.00%	**18.62%**
Lidl, Newhaven	0.24%	2.50%	0.00%	0.39%	2.44%	5.02%	3.19%	1.64%	0.00%	**1.92%**
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	21.88%	0.78%	0.00%	**3.46%**
Local Stores, Peacehaven, Meridian Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%	2.52%	0.00%	0.00%	**0.54%**
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.43%	0.00%	0.00%	**0.06%**
Sainsbury Local, Peacehaven (South Coast Road)	0.24%	0.00%	0.00%	0.00%	0.00%	0.00%	0.86%	0.00%	0.00%	**0.16%**
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.56%	0.00%	0.35%	**0.42%**
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	0.00%	0.00%	0.00%	3.82%	0.00%	0.00%	0.00%	0.00%	1.10%	**0.43%**
Local Stores , Newick	0.00%	0.00%	0.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.03%**
Local Stores, Ditchling	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Local Stores, Ripe	*0.00%*	*0.00%*	*0.00%*	*2.29%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	***0.20%***
Local Stores, Chailey	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Local Stores, Firle	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Local Stores, Plumpton Green	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
LEWES VILLAGES/SMALLER CENTRES										
OUTSIDE LEWES DISTRICT										
Sainsbury, Hampden Park, Eastbourne	0.24%	0.00%	0.00%	1.14%	0.23%	0.00%	0.00%	0.00%	0.00%	**0.19%**
Asda, The Crumbles, Eastbourne	0.00%	0.00%	0.00%	0.39%	1.44%	0.00%	0.00%	0.00%	0.00%	**0.39%**
Lidl, Eastbourne	0.00%	0.00%	0.00%	0.39%	0.12%	0.33%	0.00%	0.00%	0.00%	**0.10%**
Local Stores, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Eastbourne Others	0.70%	0.00%	0.00%	0.39%	6.05%	0.00%	0.85%	0.00%	0.35%	**1.79%**
Asda, Hollingbury, Brighton	4.43%	3.83%	1.00%	0.39%	0.00%	2.17%	0.85%	0.00%	3.60%	**1.54%**
Asda, Brighton Marina	0.00%	0.00%	0.00%	0.00%	0.42%	4.87%	31.36%	37.35%	0.00%	**8.54%**
Sainsbury, Lewes Road, Brighton	0.93%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.25%	0.00%	**0.23%**
Morrisons , Brighton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.89%	0.35%	**0.26%**
Local Stores, Brighton	0.00%	0.00%	0.00%	0.39%	0.00%	0.00%	0.00%	0.78%	0.00%	**0.10%**
Brighton Others	0.71%	0.00%	0.00%	0.00%	0.12%	0.00%	1.49%	6.49%	0.00%	**0.87%**
Sainsbury Local, Portland Road, Hove	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.10%	**0.10%**
Co-Op, Blatchington Road, Hove	0.00%	0.00%	0.00%	0.39%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.03%**
Iceland , Blatchington Road, Hove	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Sainsbury, Haywards Heath (Bannister Way)	0.24%	0.00%	10.62%	0.00%	0.00%	0.00%	0.00%	0.00%	8.72%	**1.42%**
Sainsbury Local, Wivelsfield Road, Haywards Heath	0.00%	0.00%	9.12%	0.00%	0.00%	0.00%	0.00%	0.00%	1.10%	**0.59%**
Iceland, Haywards Heath	0.00%	0.00%	1.90%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.10%**
Tesco, Burgess Hill	0.00%	10.00%	7.71%	0.00%	0.00%	0.00%	0.00%	0.39%	36.39%	**4.16%**
Lidl, Burgess Hill	0.00%	0.00%	1.50%	0.00%	0.00%	0.00%	0.00%	0.00%	1.40%	**0.22%**
Waitrose, Burgess Hill	0.00%	7.67%	3.81%	0.00%	0.00%	0.00%	0.00%	0.00%	14.82%	**1.81%**
Local Stores, Burgess Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.79%	**0.53%**
Co-Op, Longridge Avenue, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.85%	0.00%	**0.39%**
Co-Op, Lustrells Vale, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.67%	0.00%	**0.30%**
Local Stores, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.39%	0.00%	**0.03%**
Co-Op, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Tesco Express, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Tesco, Uckfield	0.70%	0.00%	23.36%	0.39%	0.00%	0.00%	0.00%	0.00%	0.00%	**1.36%**
Local Stores, Uckfield	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Budgens, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	10.87%	**0.99%**
Local Stores, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.80%	**0.16%**
Waitrose, Hailsham	0.00%	0.00%	0.00%	1.93%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.16%**
Other	0.93%	3.83%	11.71%	7.26%	0.12%	0.00%	1.28%	6.96%	6.88%	**2.97%**
* Internet - Ocado	0.00%	0.00%	0.00%	3.07%	1.28%	0.00%	1.27%	0.00%	1.45%	**0.90%**
* Internet - Sainsburys	1.39%	2.50%	3.81%	0.00%	0.42%	1.69%	0.85%	1.64%	0.00%	**1.06%**
* Internet - Tesco	0.70%	2.50%	3.81%	1.14%	2.80%	0.84%	2.97%	1.64%	1.45%	**1.98%**
* Internet - Asda	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.63%	1.25%	0.35%	**0.30%**
INTERNET	2.09%	4.99%	7.62%	4.22%	4.74%	2.53%	5.72%	4.53%	3.24%	**4.23%**

Notes: Based upon market shares from the household survey
Main food 1st choice and other location regularly used have been combined applying a wieighting (80% 1st choice, 20% regular other).
Don't do' responses removed from the household survey results for the analysis.

Table E: **Convenience Top Up Food Shopping Patterns**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Waitrose, Lewes	29.81%	11.54%	4.65%	11.76%	0.60%	0.00%	0.00%	0.00%	3.03%	**6.14%**
Local Stores, Lewes TC	19.23%	15.38%	0.00%	3.92%	0.00%	0.00%	0.00%	0.00%	0.00%	**3.55%**
LEWES TOWN CENTRE										
Tesco, Lewes	23.08%	11.54%	4.65%	13.73%	0.00%	1.11%	2.36%	0.00%	0.00%	**5.46%**
Aldi, Lewes	4.81%	3.85%	0.00%	1.96%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.95%**
Local Stores, Lewes Not In Town Centre	15.38%	7.69%	2.33%	9.80%	1.20%	0.00%	0.00%	0.00%	3.03%	**3.82%**
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	0.00%	0.00%	0.00%	0.00%	35.93%	2.22%	1.57%	0.00%	0.00%	**8.73%**
Local Stores , Seaford	0.00%	0.00%	0.00%	0.00%	23.95%	0.00%	0.00%	0.00%	0.00%	**5.46%**
Tesco Express, Seaford	0.96%	0.00%	0.00%	0.00%	13.77%	0.00%	0.00%	0.00%	0.00%	**3.27%**
Co-Op, Broad Street, Seaford	0.00%	0.00%	0.00%	0.00%	6.59%	0.00%	0.00%	0.00%	0.00%	**1.50%**
Cost Cutter, Princes Drive, Seaford	0.00%	0.00%	0.00%	0.00%	2.40%	0.00%	0.00%	0.00%	0.00%	**0.55%**
SEAFORD										
Co-Op, Newhaven	0.00%	0.00%	0.00%	0.00%	1.80%	22.22%	0.79%	1.69%	0.00%	**3.41%**
Local Stores, Newhaven	0.00%	0.00%	0.00%	0.00%	0.60%	8.89%	0.00%	0.00%	0.00%	**1.23%**
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	0.00%	7.69%	0.00%	0.00%	6.59%	46.67%	7.09%	1.69%	0.00%	**8.87%**
Lidl, Newhaven	0.00%	3.85%	0.00%	0.00%	0.60%	3.33%	1.57%	1.69%	0.00%	**1.09%**
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	0.00%	0.00%	0.00%	0.00%	0.00%	3.33%	44.09%	1.69%	0.00%	**8.19%**
Local Stores, Peacehaven, Meridian Centre	0.00%	0.00%	0.00%	0.00%	0.00%	1.11%	3.15%	0.00%	0.00%	**0.68%**
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.15%	0.00%	0.00%	**0.55%**
Sainsbury Local, Peacehaven (South Coast Road)	0.00%	0.00%	0.00%	0.00%	0.00%	2.22%	9.45%	0.00%	0.00%	**1.91%**
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	0.96%	0.00%	0.00%	0.00%	0.00%	0.00%	18.11%	0.00%	0.00%	**3.27%**
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	0.00%	0.00%	0.00%	35.29%	0.00%	0.00%	0.00%	0.00%	0.00%	**2.46%**
Local Stores , Newick	0.96%	0.00%	30.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**1.91%**
Local Stores, Ditchling	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.03%	**0.27%**
Local Stores, Ripe	*0.00%*	*0.00%*	*0.00%*	*5.88%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	***0.41%***
Local Stores, Chailey	0.00%	0.00%	20.93%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**1.23%**
Local Stores, Firle	0.00%	0.00%	0.00%	5.88%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.41%**
Local Stores, Plumpton Green	0.00%	23.08%	2.33%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.95%**
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.60%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Asda, The Crumbles, Eastbourne	0.00%	0.00%	0.00%	0.00%	1.20%	1.11%	0.00%	0.00%	0.00%	**0.41%**
Lidl, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.00%	1.11%	0.00%	0.00%	0.00%	**0.14%**
Local Stores, Eastbourne	0.00%	0.00%	0.00%	0.00%	1.80%	0.00%	0.00%	0.00%	0.00%	**0.41%**
Eastbourne Others	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Asda, Hollingbury, Brighton	1.92%	3.85%	2.33%	1.96%	0.00%	0.00%	0.79%	1.69%	0.00%	**0.95%**
Asda, Brighton Marina	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.36%	1.69%	1.52%	**0.68%**
Sainsbury, Lewes Road, Brighton	0.96%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Morrisons , Brighton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.69%	0.00%	**0.14%**
Local Stores, Brighton	0.00%	0.00%	0.00%	0.00%	0.60%	0.00%	0.79%	1.69%	0.00%	**0.41%**
Brighton Others	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
Sainsbury Local, Portland Road, Hove	0.00%	0.00%	0.00%	0.00%	0.00%	1.11%	0.00%	0.00%	0.00%	**0.14%**
Co-Op, Blatchington Road, Hove	0.00%	0.00%	0.00%	1.96%	0.00%	1.11%	0.00%	0.00%	0.00%	**0.27%**
Iceland , Blatchington Road, Hove	0.00%	0.00%	0.00%	0.00%	0.60%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Sainsbury, Haywards Heath (Bannister Way)	0.00%	0.00%	2.33%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Sainsbury Local, Wivelsfield Road, Haywards Heath	0.00%	0.00%	4.65%	0.00%	0.00%	0.00%	0.00%	0.00%	3.03%	**0.55%**
Iceland, Haywards Heath	0.00%	0.00%	2.33%	0.00%	0.00%	0.00%	0.00%	0.00%	1.52%	**0.27%**
Tesco, Burgess Hill	0.00%	0.00%	2.33%	0.00%	0.00%	0.00%	0.00%	0.00%	9.09%	**0.95%**
Lidl, Burgess Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.55%	**0.41%**
Waitrose, Burgess Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.55%	**0.41%**
Local Stores, Burgess Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.73%	**2.05%**
Co-Op, Longridge Avenue, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	37.29%	0.00%	**3.00%**
Co-Op, Lustrells Vale, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.03%	0.00%	**1.77%**
Local Stores, Saltdean	0.00%	3.85%	0.00%	0.00%	0.00%	0.00%	0.00%	15.25%	0.00%	**1.36%**
Co-Op, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.69%	0.00%	**0.14%**
Tesco Express, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	1.69%	0.00%	**0.27%**
Tesco, Uckfield	0.96%	0.00%	13.95%	0.00%	0.00%	1.11%	0.00%	0.00%	0.00%	**1.09%**
Local Stores, Uckfield	0.96%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Budgens, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	34.85%	**3.14%**
Local Stores, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.52%	**0.14%**
Waitrose, Hailsham	0.00%	0.00%	0.00%	1.96%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.14%**
Other	0.00%	7.69%	6.98%	1.96%	0.60%	2.22%	3.15%	6.78%	6.06%	**2.86%**
* Internet - Ocado	0.00%	0.00%	0.00%	3.92%	0.00%	0.00%	0.00%	0.00%	1.52%	**0.41%**
* Internet - Sainsburys	0.00%	0.00%	0.00%	0.00%	0.60%	1.11%	0.00%	1.69%	0.00%	**0.41%**
* Internet - Tesco	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	0.00%	0.00%	**0.14%**
* Internet - ASDA	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
INTERNET										

Notes: Based upon market shares from the household survey
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table F: **Convenience Shopping Patterns (Combined Main & Top-Up)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Waitrose, Lewes	29.21%	20.26%	4.76%	20.22%	0.34%	0.82%	0.74%	0.55%	2.17%	**7.34%**
Local Stores, Lewes TC	8.41%	4.61%	0.35%	1.18%	0.00%	0.00%	0.00%	0.00%	0.00%	**1.45%**
LEWES TOWN CENTRE										
Tesco, Lewes	40.58%	22.13%	10.45%	34.34%	0.08%	2.32%	1.16%	1.15%	0.25%	**10.61%**
Aldi, Lewes	4.89%	4.66%	2.03%	2.74%	0.00%	0.00%	0.00%	0.27%	0.00%	**1.23%**
Local Stores, Lewes Not In Town Centre	5.45%	3.24%	0.70%	4.02%	0.36%	0.00%	0.00%	0.00%	0.91%	**1.37%**
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	0.49%	0.00%	0.00%	0.27%	45.97%	6.77%	2.41%	0.55%	0.00%	**12.03%**
Local Stores , Seaford	0.00%	0.00%	0.00%	0.00%	9.88%	0.00%	0.00%	0.00%	0.00%	**2.31%**
Tesco Express, Seaford	0.29%	0.00%	0.00%	0.00%	5.73%	0.00%	0.00%	0.00%	0.00%	**1.41%**
Co-Op, Broad Street, Seaford	0.00%	0.00%	0.00%	0.00%	4.86%	0.00%	0.00%	0.00%	0.00%	**1.18%**
Cost Cutter, Princes Drive, Seaford	0.00%	0.00%	0.00%	0.00%	0.88%	0.00%	0.00%	0.00%	0.00%	**0.21%**
SEAFORD										
Co-Op, Newhaven	0.00%	1.75%	0.00%	0.00%	0.78%	16.89%	0.68%	0.78%	0.00%	**2.41%**
Local Stores, Newhaven	0.00%	0.00%	0.00%	0.00%	0.18%	3.37%	0.00%	0.00%	0.00%	**0.44%**
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	0.67%	7.67%	0.00%	2.95%	17.97%	53.71%	19.21%	17.30%	0.00%	**15.69%**
Lidl, Newhaven	0.17%	2.90%	0.00%	0.27%	1.89%	4.51%	2.71%	1.66%	0.00%	**1.67%**
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	0.00%	0.00%	0.00%	0.00%	0.00%	1.00%	28.54%	1.06%	0.00%	**4.88%**
Local Stores, Peacehaven, Meridian Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.95%	2.71%	0.00%	0.00%	**0.58%**
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.25%	0.00%	0.00%	**0.21%**
Sainsbury Local, Peacehaven (South Coast Road)	0.17%	0.00%	0.00%	0.00%	0.00%	0.67%	3.44%	0.00%	0.00%	**0.69%**
Tesco Express, Kirkby Drive, Telscombe Cliffs,	0.29%	0.00%	0.00%	0.00%	0.00%	0.00%	7.23%	0.00%	0.25%	**1.28%**
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	0.00%	0.00%	0.00%	13.26%	0.00%	0.00%	0.00%	0.00%	0.77%	**1.04%**
Local Stores , Newick	0.29%	0.00%	9.42%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.60%**
Local Stores, Ditchling	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.91%	**0.08%**
Local Stores, Ripe	*0.00%*	*0.00%*	*0.00%*	*3.37%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	***0.26%***
Local Stores, Chailey	0.00%	0.00%	6.28%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.37%**
Local Stores, Firle	0.00%	0.00%	0.00%	1.76%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.12%**
Local Stores, Plumpton Green	0.00%	6.92%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.29%**
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	0.17%	0.00%	0.00%	0.80%	0.34%	0.00%	0.00%	0.00%	0.00%	**0.18%**
Asda, The Crumbles, Eastbourne	0.00%	0.00%	0.00%	0.27%	1.37%	0.33%	0.00%	0.00%	0.00%	**0.40%**
Lidl, Eastbourne	0.00%	0.00%	0.00%	0.27%	0.08%	0.57%	0.00%	0.00%	0.00%	**0.11%**
Local Stores, Eastbourne	0.00%	0.00%	0.00%	0.00%	0.54%	0.00%	0.00%	0.00%	0.00%	**0.12%**
Eastbourne Others	0.49%	0.00%	0.00%	0.27%	4.23%	0.00%	0.59%	0.00%	0.25%	**1.25%**
Asda, Hollingbury, Brighton	3.68%	3.84%	1.40%	0.86%	0.00%	1.52%	0.83%	0.51%	2.52%	**1.36%**
Asda, Brighton Marina	0.00%	0.00%	0.00%	0.00%	0.30%	3.41%	22.66%	26.65%	0.46%	**6.18%**
Sainsbury, Lewes Road, Brighton	0.94%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.87%	0.00%	**0.20%**
Morrisons , Brighton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.53%	0.25%	**0.23%**
Local Stores, Brighton	0.00%	0.00%	0.00%	0.27%	0.18%	0.00%	0.24%	1.06%	0.00%	**0.19%**
Brighton Others	0.50%	0.00%	0.00%	0.00%	0.08%	0.00%	1.05%	4.54%	0.00%	**0.61%**
Sainsbury Local, Portland Road, Hove	0.00%	0.00%	0.00%	0.00%	0.00%	0.33%	0.00%	0.00%	0.77%	**0.11%**
Co-Op, Blatchington Road, Hove	0.00%	0.00%	0.00%	0.86%	0.00%	0.33%	0.00%	0.00%	0.00%	**0.10%**
Iceland , Blatchington Road, Hove	0.00%	0.00%	0.00%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	**0.04%**
Sainsbury, Haywards Heath (Bannister Way)	0.17%	0.00%	8.13%	0.00%	0.00%	0.00%	0.00%	0.00%	6.11%	**1.03%**
Sainsbury Local, Wivelsfield Road, Haywards Heath	0.00%	0.00%	7.78%	0.00%	0.00%	0.00%	0.00%	0.00%	1.68%	**0.58%**
Iceland, Haywards Heath	0.00%	0.00%	2.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.46%	**0.15%**
Tesco, Burgess Hill	0.00%	7.00%	6.10%	0.00%	0.00%	0.00%	0.00%	0.27%	28.20%	**3.20%**
Lidl, Burgess Hill	0.00%	0.00%	1.05%	0.00%	0.00%	0.00%	0.00%	0.00%	2.35%	**0.28%**
Waitrose, Burgess Hill	0.00%	5.37%	2.67%	0.00%	0.00%	0.00%	0.00%	0.00%	11.74%	**1.39%**
Local Stores, Burgess Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	10.87%	**0.98%**
Co-Op, Longridge Avenue, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	14.58%	0.00%	**1.17%**
Co-Op, Lustrells Vale, Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.18%	0.00%	**0.74%**
Local Stores, Saltdean	0.00%	1.16%	0.00%	0.00%	0.00%	0.00%	0.00%	4.85%	0.00%	**0.43%**
Co-Op, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.51%	0.00%	**0.04%**
Tesco Express, Rottingdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.24%	0.51%	0.00%	**0.08%**
Tesco, Uckfield	0.78%	0.00%	20.53%	0.27%	0.00%	0.33%	0.00%	0.00%	0.00%	**1.28%**
Local Stores, Uckfield	0.29%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.04%**
Budgens, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18.07%	**1.64%**
Local Stores, Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.71%	**0.15%**
Waitrose, Hailsham	0.00%	0.00%	0.00%	1.94%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.15%**
Other	0.65%	4.99%	10.29%	5.67%	0.26%	0.67%	1.84%	6.91%	6.64%	**2.94%**
* Internet - Ocado	0.00%	0.00%	0.00%	3.33%	0.90%	0.00%	0.89%	0.00%	1.47%	**0.75%**
* Internet - Sainsburys	0.97%	1.75%	2.67%	0.00%	0.48%	1.51%	0.59%	1.66%	0.00%	**0.86%**
* Internet - Tesco	0.49%	1.75%	2.67%	0.80%	1.96%	0.59%	2.31%	1.15%	1.01%	**1.43%**
* Internet - ASDA	0.00%	0.00%	0.00%	0.00%	0.16%	0.00%	0.44%	0.87%	0.25%	**0.21%**
INTERNET										**3.25%**

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table G.1: **Implied Convenience Goods Turnovers of Existing Stores based on Market Shares** **2012**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Waitrose, Lewes	£10.904	£1.824	£0.652	£3.147	£0.175	£0.220	£0.282	£0.104	£0.488	£17.796
Local Stores, Lewes TC	£3.140	£0.415	£0.048	£0.183	£0.000	£0.000	£0.000	£0.000	£0.000	£3.786
LEWES TOWN CENTRE										
Tesco, Lewes	£15.149	£1.991	£1.430	£5.345	£0.042	£0.621	£0.439	£0.218	£0.055	£25.291
Aldi, Lewes	£1.826	£0.419	£0.278	£0.426	£0.000	£0.000	£0.000	£0.052	£0.000	£3.002
Local Stores, Lewes Not In Town Centre	£2.034	£0.292	£0.096	£0.625	£0.184	£0.000	£0.000	£0.000	£0.205	£3.435
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	£0.182	£0.000	£0.000	£0.043	£23.553	£1.813	£0.911	£0.104	£0.000	£26.606
Local Stores , Seaford	£0.000	£0.000	£0.000	£0.000	£5.062	£0.000	£0.000	£0.000	£0.000	£5.062
Tesco Express, Seaford	£0.108	£0.000	£0.000	£0.000	£2.936	£0.000	£0.000	£0.000	£0.000	£3.043
Co-Op, Broad Street, Seaford	£0.000	£0.000	£0.000	£0.000	£2.488	£0.000	£0.000	£0.000	£0.000	£2.488
Cost Cutter, Princes Drive, Seaford	£0.000	£0.000	£0.000	£0.000	£0.452	£0.000	£0.000	£0.000	£0.000	£0.452
SEAFORD										
Co-Op, Newhaven	£0.000	£0.157	£0.000	£0.000	£0.402	£4.523	£0.257	£0.149	£0.000	£5.487
Local Stores, Newhaven	£0.000	£0.000	£0.000	£0.000	£0.092	£0.901	£0.000	£0.000	£0.000	£0.994
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	£0.249	£0.691	£0.000	£0.459	£9.209	£14.379	£7.277	£3.290	£0.000	£35.554
Lidl, Newhaven	£0.062	£0.261	£0.000	£0.043	£0.968	£1.209	£1.025	£0.315	£0.000	£3.883
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	£0.000	£0.000	£0.000	£0.000	£0.000	£0.267	£10.810	£0.201	£0.000	£11.278
Local Stores, Peacehaven, Meridian Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.256	£1.026	£0.000	£0.000	£1.282
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.472	£0.000	£0.000	£0.472
Sainsbury Local, Peacehaven (South Coast Road)	£0.062	£0.000	£0.000	£0.000	£0.000	£0.178	£1.302	£0.000	£0.000	£1.542
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£0.108	£0.000	£0.000	£0.000	£0.000	£0.000	£2.737	£0.000	£0.055	£2.900
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	£0.000	£0.000	£0.000	£2.064	£0.000	£0.000	£0.000	£0.000	£0.173	£2.237
Local Stores , Newick	£0.108	£0.000	£1.290	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.397
Local Stores, Ditchling	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.205	£0.205
Local Stores, Ripe	*£0.000*	*£0.000*	*£0.000*	*£0.524*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.524*
Local Stores, Chailey	£0.000	£0.000	£0.860	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.860
Local Stores, Firle	£0.000	£0.000	£0.000	£0.275	£0.000	£0.000	£0.000	£0.000	£0.000	£0.275
Local Stores, Plumpton Green	£0.000	£0.623	£0.096	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.719
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	£0.062	£0.000	£0.000	£0.125	£0.175	£0.000	£0.000	£0.000	£0.000	£0.362
Asda, The Crumbles, Eastbourne	£0.000	£0.000	£0.000	£0.043	£0.700	£0.089	£0.000	£0.000	£0.000	£0.832
Lidl, Eastbourne	£0.000	£0.000	£0.000	£0.043	£0.042	£0.152	£0.000	£0.000	£0.000	£0.236
Local Stores, Eastbourne	£0.000	£0.000	£0.000	£0.000	£0.277	£0.000	£0.000	£0.000	£0.000	£0.277
Eastbourne Others	£0.182	£0.000	£0.000	£0.043	£2.169	£0.000	£0.225	£0.000	£0.055	£2.673
Asda, Hollingbury, Brighton	£1.373	£0.345	£0.192	£0.134	£0.000	£0.407	£0.315	£0.096	£0.567	£3.430
Asda, Brighton Marina	£0.000	£0.000	£0.000	£0.000	£0.152	£0.913	£8.584	£5.068	£0.103	£14.821
Sainsbury, Lewes Road, Brighton	£0.352	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.166	£0.000	£0.518
Morrisons , Brighton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.481	£0.055	£0.536
Local Stores, Brighton	£0.000	£0.000	£0.000	£0.043	£0.092	£0.000	£0.090	£0.201	£0.000	£0.425
Brighton Others	£0.187	£0.000	£0.000	£0.000	£0.042	£0.000	£0.396	£0.864	£0.000	£1.488
Sainsbury Local, Portland Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.000	£0.089	£0.000	£0.000	£0.173	£0.262
Co-Op, Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.134	£0.000	£0.089	£0.000	£0.000	£0.000	£0.223
Iceland , Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.092	£0.000	£0.000	£0.000	£0.000	£0.092
Sainsbury, Haywards Heath (Bannister Way)	£0.062	£0.000	£1.113	£0.000	£0.000	£0.000	£0.000	£0.000	£1.375	£2.550
Sainsbury Local, Wivelsfield Road, Haywards Heath	£0.000	£0.000	£1.065	£0.000	£0.000	£0.000	£0.000	£0.000	£0.377	£1.442
Iceland, Haywards Heath	£0.000	£0.000	£0.278	£0.000	£0.000	£0.000	£0.000	£0.000	£0.103	£0.381
Tesco, Burgess Hill	£0.000	£0.630	£0.835	£0.000	£0.000	£0.000	£0.000	£0.052	£6.349	£7.865
Lidl, Burgess Hill	£0.000	£0.000	£0.144	£0.000	£0.000	£0.000	£0.000	£0.000	£0.529	£0.672
Waitrose, Burgess Hill	£0.000	£0.483	£0.365	£0.000	£0.000	£0.000	£0.000	£0.000	£2.643	£3.491
Local Stores, Burgess Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.447	£2.447
Co-Op, Longridge Avenue, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.773	£0.000	£2.773
Co-Op, Lustrells Vale, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.746	£0.000	£1.746
Local Stores, Saltdean	£0.000	£0.104	£0.000	£0.000	£0.000	£0.000	£0.000	£0.922	£0.000	£1.026
Co-Op, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.000	£0.096
Tesco Express, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.090	£0.096	£0.000	£0.186
Tesco, Uckfield	£0.289	£0.000	£2.811	£0.043	£0.000	£0.089	£0.000	£0.000	£0.000	£3.233
Local Stores, Uckfield	£0.108	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.108
Budgens, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.067	£4.067
Local Stores, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.386	£0.386
Waitrose, Hailsham	£0.000	£0.000	£0.000	£0.302	£0.000	£0.000	£0.000	£0.000	£0.000	£0.302
Other	£0.244	£0.449	£1.409	£0.882	£0.134	£0.178	£0.697	£1.313	£1.494	£6.801
* Internet - Ocado	£0.000	£0.000	£0.000	£0.518	£0.459	£0.000	£0.337	£0.000	£0.331	£1.645
* Internet - Sainsburys	£0.364	£0.157	£0.365	£0.000	£0.244	£0.406	£0.225	£0.315	£0.000	£2.075
* Internet - Tesco	£0.182	£0.157	£0.365	£0.125	£1.004	£0.157	£0.876	£0.218	£0.228	£3.313
* Internet - ASDA	£0.000	£0.000	£0.000	£0.000	£0.083	£0.000	£0.168	£0.166	£0.055	£0.472
INTERNET	£0.546	£0.314	£0.730	£0.642	£1.791	£0.563	£1.606	£0.699	£0.614	£7.505

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table G.2: **Implied Convenience Goods Turnovers of Existing Stores based on Market Shares** **2016**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Waitrose, Lewes	£11.132	£1.862	£0.665	£3.213	£0.179	£0.225	£0.287	£0.107	£0.498	£18.167
Local Stores, Lewes TC	£3.205	£0.424	£0.049	£0.187	£0.000	£0.000	£0.000	£0.000	£0.000	£3.865
LEWES TOWN CENTRE										
Tesco, Lewes	£15.465	£2.033	£1.460	£5.456	£0.042	£0.634	£0.449	£0.223	£0.056	£25.819
Aldi, Lewes	£1.864	£0.428	£0.284	£0.435	£0.000	£0.000	£0.000	£0.053	£0.000	£3.064
Local Stores, Lewes Not In Town Centre	£2.076	£0.298	£0.098	£0.638	£0.188	£0.000	£0.000	£0.000	£0.209	£3.507
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	£0.186	£0.000	£0.000	£0.044	£24.044	£1.851	£0.930	£0.107	£0.000	£27.161
Local Stores , Seaford	£0.000	£0.000	£0.000	£0.000	£5.167	£0.000	£0.000	£0.000	£0.000	£5.167
Tesco Express, Seaford	£0.110	£0.000	£0.000	£0.000	£2.997	£0.000	£0.000	£0.000	£0.000	£3.107
Co-Op, Broad Street, Seaford	£0.000	£0.000	£0.000	£0.000	£2.540	£0.000	£0.000	£0.000	£0.000	£2.540
Cost Cutter, Princes Drive, Seaford	£0.000	£0.000	£0.000	£0.000	£0.462	£0.000	£0.000	£0.000	£0.000	£0.462
SEAFORD										
Co-Op, Newhaven	£0.000	£0.161	£0.000	£0.000	£0.410	£4.617	£0.263	£0.152	£0.000	£5.602
Local Stores, Newhaven	£0.000	£0.000	£0.000	£0.000	£0.094	£0.920	£0.000	£0.000	£0.000	£1.014
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	£0.254	£0.705	£0.000	£0.469	£9.401	£14.679	£7.428	£3.359	£0.000	£36.295
Lidl, Newhaven	£0.063	£0.267	£0.000	£0.044	£0.988	£1.234	£1.047	£0.321	£0.000	£3.964
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	£0.000	£0.000	£0.000	£0.000	£0.000	£0.273	£11.036	£0.205	£0.000	£11.514
Local Stores, Peacehaven, Meridian Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.261	£1.047	£0.000	£0.000	£1.308
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.482	£0.000	£0.000	£0.482
Sainsbury Local, Peacehaven (South Coast Road)	£0.063	£0.000	£0.000	£0.000	£0.000	£0.182	£1.329	£0.000	£0.000	£1.575
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£0.110	£0.000	£0.000	£0.000	£0.000	£0.000	£2.794	£0.000	£0.056	£2.960
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	£0.000	£0.000	£0.000	£2.108	£0.000	£0.000	£0.000	£0.000	£0.176	£2.284
Local Stores , Newick	£0.110	£0.000	£1.316	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.426
Local Stores, Ditchling	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.209	£0.209
Local Stores, Ripe	£0.000	£0.000	£0.000	£0.535	£0.000	£0.000	£0.000	£0.000	£0.000	*£0.535*
Local Stores, Chailey	£0.000	£0.000	£0.878	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.878
Local Stores, Firle	£0.000	£0.000	£0.000	£0.280	£0.000	£0.000	£0.000	£0.000	£0.000	£0.280
Local Stores, Plumpton Green	£0.000	£0.636	£0.098	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.734
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	£0.063	£0.000	£0.000	£0.127	£0.179	£0.000	£0.000	£0.000	£0.000	£0.370
Asda, The Crumbles, Eastbourne	£0.000	£0.000	£0.000	£0.044	£0.715	£0.091	£0.000	£0.000	£0.000	£0.849
Lidl, Eastbourne	£0.000	£0.000	£0.000	£0.044	£0.042	£0.155	£0.000	£0.000	£0.000	£0.241
Local Stores, Eastbourne	£0.000	£0.000	£0.000	£0.000	£0.282	£0.000	£0.000	£0.000	£0.000	£0.282
Eastbourne Others	£0.186	£0.000	£0.000	£0.044	£2.214	£0.000	£0.230	£0.000	£0.056	£2.729
Asda, Hollingbury, Brighton	£1.402	£0.352	£0.196	£0.137	£0.000	£0.416	£0.321	£0.098	£0.579	£3.501
Asda, Brighton Marina	£0.000	£0.000	£0.000	£0.000	£0.155	£0.932	£8.763	£5.174	£0.105	£15.130
Sainsbury, Lewes Road, Brighton	£0.359	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.170	£0.000	£0.529
Morrisons , Brighton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.491	£0.056	£0.547
Local Stores, Brighton	£0.000	£0.000	£0.000	£0.044	£0.094	£0.000	£0.092	£0.205	£0.000	£0.434
Brighton Others	£0.190	£0.000	£0.000	£0.000	£0.042	£0.000	£0.404	£0.882	£0.000	£1.519
Sainsbury Local, Portland Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.000	£0.091	£0.000	£0.000	£0.176	£0.267
Co-Op, Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.137	£0.000	£0.091	£0.000	£0.000	£0.000	£0.228
Iceland , Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.094	£0.000	£0.000	£0.000	£0.000	£0.094
Sainsbury, Haywards Heath (Bannister Way)	£0.063	£0.000	£1.136	£0.000	£0.000	£0.000	£0.000	£0.000	£1.404	£2.603
Sainsbury Local, Wivelsfield Road, Haywards Heath	£0.000	£0.000	£1.087	£0.000	£0.000	£0.000	£0.000	£0.000	£0.385	£1.472
Iceland, Haywards Heath	£0.000	£0.000	£0.284	£0.000	£0.000	£0.000	£0.000	£0.000	£0.105	£0.389
Tesco, Burgess Hill	£0.000	£0.643	£0.852	£0.000	£0.000	£0.000	£0.000	£0.053	£6.481	£8.029
Lidl, Burgess Hill	£0.000	£0.000	£0.147	£0.000	£0.000	£0.000	£0.000	£0.000	£0.540	£0.686
Waitrose, Burgess Hill	£0.000	£0.493	£0.373	£0.000	£0.000	£0.000	£0.000	£0.000	£2.698	£3.564
Local Stores, Burgess Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.498	£2.498
Co-Op, Longridge Avenue, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.830	£0.000	£2.830
Co-Op, Lustrells Vale, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.782	£0.000	£1.782
Local Stores, Saltdean	£0.000	£0.106	£0.000	£0.000	£0.000	£0.000	£0.000	£0.941	£0.000	£1.047
Co-Op, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.098	£0.000	£0.098
Tesco Express, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.092	£0.098	£0.000	£0.190
Tesco, Uckfield	£0.295	£0.000	£2.870	£0.044	£0.000	£0.091	£0.000	£0.000	£0.000	£3.300
Local Stores, Uckfield	£0.110	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.110
Budgens, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.152	£4.152
Local Stores, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.394	£0.394
Waitrose, Hailsham	£0.000	£0.000	£0.000	£0.308	£0.000	£0.000	£0.000	£0.000	£0.000	£0.308
Other	£0.249	£0.458	£1.438	£0.900	£0.137	£0.182	£0.712	£1.341	£1.525	£6.943
* Internet - Ocado	£0.000	£0.000	£0.000	£0.529	£0.469	£0.000	£0.344	£0.000	£0.337	£1.679
* Internet - Sainsburys	£0.371	£0.161	£0.373	£0.000	£0.249	£0.414	£0.230	£0.321	£0.000	£2.119
* Internet - Tesco	£0.186	£0.161	£0.373	£0.127	£1.025	£0.161	£0.894	£0.223	£0.233	£3.382
* Internet - ASDA	£0.000	£0.000	£0.000	£0.000	£0.085	£0.000	£0.171	£0.170	£0.056	£0.482
INTERNET	£0.557	£0.321	£0.745	£0.656	£1.828	£0.575	£1.639	£0.714	£0.626	£7.661

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table G.3: **Implied Convenience Goods Turnovers of Existing Stores based on Market Shares** **2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Waitrose, Lewes	£11.398	£1.906	£0.681	£3.290	£0.183	£0.230	£0.294	£0.109	£0.510	£18.602
Local Stores, Lewes TC	£3.282	£0.434	£0.050	£0.191	£0.000	£0.000	£0.000	£0.000	£0.000	£3.957
LEWES TOWN CENTRE										
Tesco, Lewes	£15.835	£2.082	£1.495	£5.587	£0.043	£0.650	£0.459	£0.228	£0.058	£26.437
Aldi, Lewes	£1.909	£0.438	£0.291	£0.446	£0.000	£0.000	£0.000	£0.055	£0.000	£3.138
Local Stores, Lewes Not In Town Centre	£2.126	£0.305	£0.100	£0.653	£0.193	£0.000	£0.000	£0.000	£0.214	£3.591
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	£0.190	£0.000	£0.000	£0.045	£24.620	£1.895	£0.953	£0.109	£0.000	£27.811
Local Stores , Seaford	£0.000	£0.000	£0.000	£0.000	£5.291	£0.000	£0.000	£0.000	£0.000	£5.291
Tesco Express, Seaford	£0.112	£0.000	£0.000	£0.000	£3.069	£0.000	£0.000	£0.000	£0.000	£3.181
Co-Op, Broad Street, Seaford	£0.000	£0.000	£0.000	£0.000	£2.600	£0.000	£0.000	£0.000	£0.000	£2.600
Cost Cutter, Princes Drive, Seaford	£0.000	£0.000	£0.000	£0.000	£0.473	£0.000	£0.000	£0.000	£0.000	£0.473
SEAFORD										
Co-Op, Newhaven	£0.000	£0.164	£0.000	£0.000	£0.420	£4.728	£0.269	£0.155	£0.000	£5.736
Local Stores, Newhaven	£0.000	£0.000	£0.000	£0.000	£0.096	£0.942	£0.000	£0.000	£0.000	£1.039
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	£0.260	£0.722	£0.000	£0.480	£9.626	£15.030	£7.606	£3.439	£0.000	£37.164
Lidl, Newhaven	£0.065	£0.273	£0.000	£0.045	£1.012	£1.263	£1.072	£0.329	£0.000	£4.059
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	£0.000	£0.000	£0.000	£0.000	£0.000	£0.280	£11.300	£0.210	£0.000	£11.789
Local Stores, Peacehaven, Meridian Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.267	£1.073	£0.000	£0.000	£1.340
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.493	£0.000	£0.000	£0.493
Sainsbury Local, Peacehaven (South Coast Road)	£0.065	£0.000	£0.000	£0.000	£0.000	£0.186	£1.361	£0.000	£0.000	£1.612
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£0.112	£0.000	£0.000	£0.000	£0.000	£0.000	£2.861	£0.000	£0.058	£3.031
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	£0.000	£0.000	£0.000	£2.158	£0.000	£0.000	£0.000	£0.000	£0.181	£2.339
Local Stores , Newick	£0.112	£0.000	£1.348	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.460
Local Stores, Ditchling	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.214	£0.214
Local Stores, Ripe	£0.000	£0.000	£0.000	£0.548	£0.000	£0.000	£0.000	£0.000	£0.000	*£0.548*
Local Stores, Chailey	£0.000	£0.000	£0.899	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.899
Local Stores, Firle	£0.000	£0.000	£0.000	£0.287	£0.000	£0.000	£0.000	£0.000	£0.000	£0.287
Local Stores, Plumpton Green	£0.000	£0.651	£0.100	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.751
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	£0.065	£0.000	£0.000	£0.130	£0.183	£0.000	£0.000	£0.000	£0.000	£0.379
Asda, The Crumbles, Eastbourne	£0.000	£0.000	£0.000	£0.045	£0.732	£0.093	£0.000	£0.000	£0.000	£0.870
Lidl, Eastbourne	£0.000	£0.000	£0.000	£0.045	£0.043	£0.159	£0.000	£0.000	£0.000	£0.247
Local Stores, Eastbourne	£0.000	£0.000	£0.000	£0.000	£0.289	£0.000	£0.000	£0.000	£0.000	£0.289
Eastbourne Others	£0.190	£0.000	£0.000	£0.045	£2.267	£0.000	£0.235	£0.000	£0.058	£2.794
Asda, Hollingbury, Brighton	£1.436	£0.361	£0.200	£0.140	£0.000	£0.426	£0.329	£0.101	£0.592	£3.585
Asda, Brighton Marina	£0.000	£0.000	£0.000	£0.000	£0.159	£0.955	£8.973	£5.298	£0.107	£15.492
Sainsbury, Lewes Road, Brighton	£0.368	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.174	£0.000	£0.541
Morrisons , Brighton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.503	£0.058	£0.560
Local Stores, Brighton	£0.000	£0.000	£0.000	£0.045	£0.096	£0.000	£0.094	£0.210	£0.000	£0.445
Brighton Others	£0.195	£0.000	£0.000	£0.000	£0.043	£0.000	£0.414	£0.903	£0.000	£1.555
Sainsbury Local, Portland Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.000	£0.093	£0.000	£0.000	£0.181	£0.274
Co-Op, Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.140	£0.000	£0.093	£0.000	£0.000	£0.000	£0.234
Iceland , Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.096	£0.000	£0.000	£0.000	£0.000	£0.096
Sainsbury, Haywards Heath (Bannister Way)	£0.065	£0.000	£1.163	£0.000	£0.000	£0.000	£0.000	£0.000	£1.437	£2.666
Sainsbury Local, Wivelsfield Road, Haywards Heath	£0.000	£0.000	£1.113	£0.000	£0.000	£0.000	£0.000	£0.000	£0.394	£1.507
Iceland, Haywards Heath	£0.000	£0.000	£0.291	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.398
Tesco, Burgess Hill	£0.000	£0.659	£0.873	£0.000	£0.000	£0.000	£0.000	£0.055	£6.636	£8.222
Lidl, Burgess Hill	£0.000	£0.000	£0.150	£0.000	£0.000	£0.000	£0.000	£0.000	£0.553	£0.703
Waitrose, Burgess Hill	£0.000	£0.505	£0.381	£0.000	£0.000	£0.000	£0.000	£0.000	£2.763	£3.649
Local Stores, Burgess Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.558	£2.558
Co-Op, Longridge Avenue, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.898	£0.000	£2.898
Co-Op, Lustrells Vale, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.825	£0.000	£1.825
Local Stores, Saltdean	£0.000	£0.109	£0.000	£0.000	£0.000	£0.000	£0.000	£0.964	£0.000	£1.073
Co-Op, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.101	£0.000	£0.101
Tesco Express, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.094	£0.101	£0.000	£0.195
Tesco, Uckfield	£0.303	£0.000	£2.939	£0.045	£0.000	£0.093	£0.000	£0.000	£0.000	£3.379
Local Stores, Uckfield	£0.112	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.112
Budgens, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.252	£4.252
Local Stores, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.403	£0.403
Waitrose, Hailsham	£0.000	£0.000	£0.000	£0.315	£0.000	£0.000	£0.000	£0.000	£0.000	£0.315
Other	£0.255	£0.469	£1.473	£0.922	£0.140	£0.186	£0.729	£1.373	£1.562	£7.109
* Internet - Ocado	£0.000	£0.000	£0.000	£0.541	£0.480	£0.000	£0.353	£0.000	£0.346	£1.719
* Internet - Sainsburys	£0.380	£0.164	£0.381	£0.000	£0.255	£0.424	£0.235	£0.329	£0.000	£2.169
* Internet - Tesco	£0.190	£0.164	£0.381	£0.130	£1.050	£0.165	£0.916	£0.228	£0.238	£3.463
* Internet - ASDA	£0.000	£0.000	£0.000	£0.000	£0.087	£0.000	£0.175	£0.174	£0.058	£0.493
INTERNET	£0.570	£0.329	£0.763	£0.671	£1.872	£0.588	£1.679	£0.731	£0.641	£7.845

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table G.4: **Implied Convenience Goods Turnovers of Existing Stores based on Market Shares** **2026**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Waitrose, Lewes	£11.705	£1.957	£0.700	£3.378	£0.188	£0.236	£0.302	£0.112	£0.524	£19.102
Local Stores, Lewes TC	£3.370	£0.446	£0.051	£0.196	£0.000	£0.000	£0.000	£0.000	£0.000	£4.064
LEWES TOWN CENTRE										
Tesco, Lewes	£16.261	£2.138	£1.535	£5.737	£0.045	£0.667	£0.472	£0.234	£0.059	£27.148
Aldi, Lewes	£1.960	£0.450	£0.299	£0.458	£0.000	£0.000	£0.000	£0.056	£0.000	£3.222
Local Stores, Lewes Not In Town Centre	£2.183	£0.313	£0.103	£0.671	£0.198	£0.000	£0.000	£0.000	£0.220	£3.687
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	£0.195	£0.000	£0.000	£0.046	£25.282	£1.946	£0.978	£0.112	£0.000	£28.559
Local Stores , Seaford	£0.000	£0.000	£0.000	£0.000	£5.433	£0.000	£0.000	£0.000	£0.000	£5.433
Tesco Express, Seaford	£0.115	£0.000	£0.000	£0.000	£3.151	£0.000	£0.000	£0.000	£0.000	£3.267
Co-Op, Broad Street, Seaford	£0.000	£0.000	£0.000	£0.000	£2.670	£0.000	£0.000	£0.000	£0.000	£2.670
Cost Cutter, Princes Drive, Seaford	£0.000	£0.000	£0.000	£0.000	£0.485	£0.000	£0.000	£0.000	£0.000	£0.485
SEAFORD										
Co-Op, Newhaven	£0.000	£0.169	£0.000	£0.000	£0.431	£4.855	£0.276	£0.159	£0.000	£5.890
Local Stores, Newhaven	£0.000	£0.000	£0.000	£0.000	£0.099	£0.968	£0.000	£0.000	£0.000	£1.067
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	£0.267	£0.741	£0.000	£0.493	£9.885	£15.434	£7.811	£3.532	£0.000	£38.163
Lidl, Newhaven	£0.067	£0.280	£0.000	£0.046	£1.039	£1.297	£1.101	£0.338	£0.000	£4.168
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	£0.000	£0.000	£0.000	£0.000	£0.000	£0.287	£11.604	£0.215	£0.000	£12.106
Local Stores, Peacehaven, Meridian Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.274	£1.101	£0.000	£0.000	£1.376
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.507	£0.000	£0.000	£0.507
Sainsbury Local, Peacehaven (South Coast Road)	£0.067	£0.000	£0.000	£0.000	£0.000	£0.191	£1.397	£0.000	£0.000	£1.656
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£0.115	£0.000	£0.000	£0.000	£0.000	£0.000	£2.938	£0.000	£0.059	£3.113
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	£0.000	£0.000	£0.000	£2.216	£0.000	£0.000	£0.000	£0.000	£0.185	£2.401
Local Stores , Newick	£0.115	£0.000	£1.384	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.500
Local Stores, Ditchling	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.220	£0.220
Local Stores, Ripe	£0.000	£0.000	£0.000	£0.562	£0.000	£0.000	£0.000	£0.000	£0.000	*£0.562*
Local Stores, Chailey	£0.000	£0.000	£0.923	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.923
Local Stores, Firle	£0.000	£0.000	£0.000	£0.295	£0.000	£0.000	£0.000	£0.000	£0.000	£0.295
Local Stores, Plumpton Green	£0.000	£0.669	£0.103	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.772
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	£0.067	£0.000	£0.000	£0.134	£0.188	£0.000	£0.000	£0.000	£0.000	£0.389
Asda, The Crumbles, Eastbourne	£0.000	£0.000	£0.000	£0.046	£0.752	£0.096	£0.000	£0.000	£0.000	£0.893
Lidl, Eastbourne	£0.000	£0.000	£0.000	£0.046	£0.045	£0.163	£0.000	£0.000	£0.000	£0.253
Local Stores, Eastbourne	£0.000	£0.000	£0.000	£0.000	£0.297	£0.000	£0.000	£0.000	£0.000	£0.297
Eastbourne Others	£0.195	£0.000	£0.000	£0.046	£2.328	£0.000	£0.241	£0.000	£0.059	£2.869
Asda, Hollingbury, Brighton	£1.474	£0.371	£0.206	£0.144	£0.000	£0.437	£0.338	£0.103	£0.608	£3.681
Asda, Brighton Marina	£0.000	£0.000	£0.000	£0.000	£0.163	£0.980	£9.214	£5.440	£0.110	£15.908
Sainsbury, Lewes Road, Brighton	£0.377	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.178	£0.000	£0.556
Morrisons , Brighton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.516	£0.059	£0.575
Local Stores, Brighton	£0.000	£0.000	£0.000	£0.046	£0.099	£0.000	£0.096	£0.215	£0.000	£0.457
Brighton Others	£0.200	£0.000	£0.000	£0.000	£0.045	£0.000	£0.425	£0.927	£0.000	£1.597
Sainsbury Local, Portland Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.000	£0.000	£0.185	£0.281
Co-Op, Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.144	£0.000	£0.096	£0.000	£0.000	£0.000	£0.240
Iceland , Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.099	£0.000	£0.000	£0.000	£0.000	£0.099
Sainsbury, Haywards Heath (Bannister Way)	£0.067	£0.000	£1.195	£0.000	£0.000	£0.000	£0.000	£0.000	£1.476	£2.737
Sainsbury Local, Wivelsfield Road, Haywards Heath	£0.000	£0.000	£1.143	£0.000	£0.000	£0.000	£0.000	£0.000	£0.405	£1.548
Iceland, Haywards Heath	£0.000	£0.000	£0.299	£0.000	£0.000	£0.000	£0.000	£0.000	£0.110	£0.409
Tesco, Burgess Hill	£0.000	£0.676	£0.896	£0.000	£0.000	£0.000	£0.000	£0.056	£6.814	£8.443
Lidl, Burgess Hill	£0.000	£0.000	£0.154	£0.000	£0.000	£0.000	£0.000	£0.000	£0.567	£0.722
Waitrose, Burgess Hill	£0.000	£0.518	£0.392	£0.000	£0.000	£0.000	£0.000	£0.000	£2.837	£3.747
Local Stores, Burgess Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.627	£2.627
Co-Op, Longridge Avenue, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.976	£0.000	£2.976
Co-Op, Lustrells Vale, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.874	£0.000	£1.874
Local Stores, Saltdean	£0.000	£0.112	£0.000	£0.000	£0.000	£0.000	£0.000	£0.990	£0.000	£1.101
Co-Op, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.103	£0.000	£0.103
Tesco Express, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.103	£0.000	£0.200
Tesco, Uckfield	£0.311	£0.000	£3.018	£0.046	£0.000	£0.096	£0.000	£0.000	£0.000	£3.470
Local Stores, Uckfield	£0.115	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.115
Budgens, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.366	£4.366
Local Stores, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.414	£0.414
Waitrose, Hailsham	£0.000	£0.000	£0.000	£0.324	£0.000	£0.000	£0.000	£0.000	£0.000	£0.324
Other	£0.262	£0.482	£1.513	£0.947	£0.144	£0.191	£0.748	£1.410	£1.603	£7.300
* Internet - Ocado	£0.000	£0.000	£0.000	£0.556	£0.493	£0.000	£0.362	£0.000	£0.355	£1.765
* Internet - Sainsburys	£0.390	£0.169	£0.392	£0.000	£0.262	£0.435	£0.241	£0.338	£0.000	£2.228
* Internet - Tesco	£0.195	£0.169	£0.392	£0.134	£1.078	£0.169	£0.940	£0.234	£0.245	£3.556
* Internet - ASDA	£0.000	£0.000	£0.000	£0.000	£0.089	£0.000	£0.180	£0.178	£0.059	£0.507
INTERNET	£0.586	£0.338	£0.783	£0.690	£1.922	£0.604	£1.724	£0.750	£0.659	£8.056

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

Table G.5: **Implied Convenience Goods Turnovers of Existing Stores based on Market Shares** **2030**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Waitrose, Lewes	£11.956	£1.999	£0.715	£3.450	£0.192	£0.241	£0.309	£0.114	£0.535	£19.512
Local Stores, Lewes TC	£3.442	£0.455	£0.053	£0.201	£0.000	£0.000	£0.000	£0.000	£0.000	£4.151
LEWES TOWN CENTRE										
Tesco, Lewes	£16.610	£2.183	£1.568	£5.860	£0.046	£0.681	£0.482	£0.239	£0.060	£27.730
Aldi, Lewes	£2.002	£0.459	£0.305	£0.467	£0.000	£0.000	£0.000	£0.057	£0.000	£3.291
Local Stores, Lewes Not In Town Centre	£2.230	£0.320	£0.105	£0.685	£0.202	£0.000	£0.000	£0.000	£0.224	£3.766
LEWES OUTSIDE TOWN CENTRE										
Morrisons, Seaford	£0.199	£0.000	£0.000	£0.047	£25.824	£1.988	£0.999	£0.114	£0.000	£29.172
Local Stores , Seaford	£0.000	£0.000	£0.000	£0.000	£5.550	£0.000	£0.000	£0.000	£0.000	£5.550
Tesco Express, Seaford	£0.118	£0.000	£0.000	£0.000	£3.219	£0.000	£0.000	£0.000	£0.000	£3.337
Co-Op, Broad Street, Seaford	£0.000	£0.000	£0.000	£0.000	£2.728	£0.000	£0.000	£0.000	£0.000	£2.728
Cost Cutter, Princes Drive, Seaford	£0.000	£0.000	£0.000	£0.000	£0.496	£0.000	£0.000	£0.000	£0.000	£0.496
SEAFORD										
Co-Op, Newhaven	£0.000	£0.172	£0.000	£0.000	£0.440	£4.959	£0.282	£0.163	£0.000	£6.017
Local Stores, Newhaven	£0.000	£0.000	£0.000	£0.000	£0.101	£0.988	£0.000	£0.000	£0.000	£1.089
NEWHAVEN TOWN CENTRE										
Sainsbury, Newhaven	£0.273	£0.757	£0.000	£0.504	£10.097	£15.765	£7.978	£3.607	£0.000	£38.982
Lidl, Newhaven	£0.068	£0.286	£0.000	£0.047	£1.061	£1.325	£1.124	£0.345	£0.000	£4.257
NEWHAVEN OUTSIDE TOWN CENTRE										
Co-Op, Meridian Centre, Peacehaven	£0.000	£0.000	£0.000	£0.000	£0.000	£0.293	£11.853	£0.220	£0.000	£12.366
Local Stores, Peacehaven, Meridian Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.280	£1.125	£0.000	£0.000	£1.405
PEACEHAVEN MERIDIAN										
Local Stores, Peacehaven, South Coast Road	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.517	£0.000	£0.000	£0.517
Sainsbury Local, Peacehaven (South Coast Road)	£0.068	£0.000	£0.000	£0.000	£0.000	£0.196	£1.427	£0.000	£0.000	£1.691
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£0.118	£0.000	£0.000	£0.000	£0.000	£0.000	£3.001	£0.000	£0.060	£3.179
PEACEHAVEN SOUTH COAST/TELESCOMBE										
Local Stores, Ringmer	£0.000	£0.000	£0.000	£2.264	£0.000	£0.000	£0.000	£0.000	£0.189	£2.453
Local Stores , Newick	£0.118	£0.000	£1.414	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.532
Local Stores, Ditchling	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.224	£0.224
Local Stores, Ripe	£0.000	£0.000	£0.000	£0.574	£0.000	£0.000	£0.000	£0.000	£0.000	*£0.574*
Local Stores, Chailey	£0.000	£0.000	£0.943	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.943
Local Stores, Firle	£0.000	£0.000	£0.000	£0.301	£0.000	£0.000	£0.000	£0.000	£0.000	£0.301
Local Stores, Plumpton Green	£0.000	£0.683	£0.105	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.788
LEWES VILLAGES										
Sainsbury, Hampden Park, Eastbourne	£0.068	£0.000	£0.000	£0.137	£0.192	£0.000	£0.000	£0.000	£0.000	£0.397
Asda, The Crumbles, Eastbourne	£0.000	£0.000	£0.000	£0.047	£0.768	£0.098	£0.000	£0.000	£0.000	£0.912
Lidl, Eastbourne	£0.000	£0.000	£0.000	£0.047	£0.046	£0.166	£0.000	£0.000	£0.000	£0.259
Local Stores, Eastbourne	£0.000	£0.000	£0.000	£0.000	£0.303	£0.000	£0.000	£0.000	£0.000	£0.303
Eastbourne Others	£0.199	£0.000	£0.000	£0.047	£2.378	£0.000	£0.247	£0.000	£0.060	£2.931
Asda, Hollingbury, Brighton	£1.506	£0.379	£0.210	£0.147	£0.000	£0.447	£0.345	£0.106	£0.621	£3.760
Asda, Brighton Marina	£0.000	£0.000	£0.000	£0.000	£0.167	£1.002	£9.412	£5.557	£0.113	£16.250
Sainsbury, Lewes Road, Brighton	£0.386	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.182	£0.000	£0.568
Morrisons , Brighton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.527	£0.060	£0.588
Local Stores, Brighton	£0.000	£0.000	£0.000	£0.047	£0.101	£0.000	£0.098	£0.220	£0.000	£0.466
Brighton Others	£0.205	£0.000	£0.000	£0.000	£0.046	£0.000	£0.434	£0.947	£0.000	£1.631
Sainsbury Local, Portland Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.000	£0.098	£0.000	£0.000	£0.189	£0.287
Co-Op, Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.147	£0.000	£0.098	£0.000	£0.000	£0.000	£0.245
Iceland , Blatchington Road, Hove	£0.000	£0.000	£0.000	£0.000	£0.101	£0.000	£0.000	£0.000	£0.000	£0.101
Sainsbury, Haywards Heath (Bannister Way)	£0.068	£0.000	£1.220	£0.000	£0.000	£0.000	£0.000	£0.000	£1.507	£2.796
Sainsbury Local, Wivelsfield Road, Haywards Heath	£0.000	£0.000	£1.167	£0.000	£0.000	£0.000	£0.000	£0.000	£0.414	£1.581
Iceland, Haywards Heath	£0.000	£0.000	£0.305	£0.000	£0.000	£0.000	£0.000	£0.000	£0.113	£0.418
Tesco, Burgess Hill	£0.000	£0.691	£0.915	£0.000	£0.000	£0.000	£0.000	£0.057	£6.961	£8.624
Lidl, Burgess Hill	£0.000	£0.000	£0.158	£0.000	£0.000	£0.000	£0.000	£0.000	£0.580	£0.737
Waitrose, Burgess Hill	£0.000	£0.530	£0.400	£0.000	£0.000	£0.000	£0.000	£0.000	£2.898	£3.827
Local Stores, Burgess Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.683	£2.683
Co-Op, Longridge Avenue, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.040	£0.000	£3.040
Co-Op, Lustrells Vale, Saltdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.914	£0.000	£1.914
Local Stores, Saltdean	£0.000	£0.114	£0.000	£0.000	£0.000	£0.000	£0.000	£1.011	£0.000	£1.125
Co-Op, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.106	£0.000	£0.106
Tesco Express, Rottingdean	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.098	£0.106	£0.000	£0.204
Tesco, Uckfield	£0.317	£0.000	£3.082	£0.047	£0.000	£0.098	£0.000	£0.000	£0.000	£3.544
Local Stores, Uckfield	£0.118	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.118
Budgens, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.460	£4.460
Local Stores, Hassocks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.423	£0.423
Waitrose, Hailsham	£0.000	£0.000	£0.000	£0.331	£0.000	£0.000	£0.000	£0.000	£0.000	£0.331
Other	£0.268	£0.492	£1.545	£0.967	£0.147	£0.196	£0.765	£1.440	£1.638	£7.456
* Internet - Ocado	£0.000	£0.000	£0.000	£0.568	£0.503	£0.000	£0.370	£0.000	£0.362	£1.803
* Internet - Sainsburys	£0.399	£0.172	£0.400	£0.000	£0.268	£0.445	£0.247	£0.345	£0.000	£2.275
* Internet - Tesco	£0.199	£0.172	£0.400	£0.137	£1.101	£0.173	£0.961	£0.239	£0.250	£3.632
* Internet - ASDA	£0.000	£0.000	£0.000	£0.000	£0.091	£0.000	£0.184	£0.182	£0.060	£0.518
INTERNET	£0.598	£0.345	£0.800	£0.704	£1.964	£0.617	£1.761	£0.767	£0.673	£8.228

Notes: Based upon market shares from the household survey
Combined main food and top-up shopping destinations wieighting applied 70% main food and 30% top up.
Don't do' responses removed from the household survey results for the analysis.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table H: **Benchmark Convenience Goods Turnovers of Existing Stores**

	Sales Area	% Conveneince	Conveneince Sales	Benchmark Trading Density	Convenience Benchmark Turnover
	sqm		sqm	£/sqm	£
Waitrose, Lewes	1560	90%	1404	£12,063	£16,936,452
Local Stores, Lewes TC	*1100*	100%	1100	£3,500	£3,850,000
LEWES TOWN CENTRE	2660		2504		£20,786,452
Tesco, Lewes	2120	90%	1908	£13,021	£24,844,068
Aldi, Lewes	1025	85%	871	£7,514	£6,546,573
Local Stores, Lewes Not In Town Centre		100%	0	£3,500	£0
LEWES OUTSIDE TOWN CENTRE			2779.25		£31,390,641
Morrisons, Seaford	2205	85%	1874.25	£12,864	£24,110,352
Local Stores , Seaford	410	100%	410	£3,500	£1,435,000
Tesco Express, Seaford	250	95%	237.5	£13,021	£3,092,488
Co-Op, Broad Street, Seaford	270	95%	256.5	£7,836	£2,009,934
Cost Cutter, Princes Drive, Seaford	140	95%	133	£4,500	£598,500
SEAFORD	3275		2911.25		£31,246,274
Co-Op, Newhaven	1500	90%	1350	£7,836	£10,578,600
Local Stores, Newhaven	90	100%	90	£3,500	£315,000
NEWHAVEN TOWN CENTRE	1590		1440		£10,893,600
Sainsbury, Newhaven	2900	70%	2030	£13,141	£26,676,230
Lidl, Newhaven	1030	80%	824	£3,504	£2,887,296
NEWHAVEN OUTSIDE TOWN CENTRE	3930		2854		£29,563,526
Co-Op, Meridian Centre, Peacehaven *(a)*	2485	60%	1491	£7,836	£11,683,476
Local Stores, Peacehaven, Meridian Centre	170	100%	170	£3,500	£595,000
PEACEHAVEN MERIDIAN	2655		1661		£12,278,476
Local Stores, Peacehaven, South Coast Road	280	100%	280	£3,500	£980,000
Sainsbury Local, Peacehaven (South Coast	220	95%	209	£13,141	£2,746,469
Tesco Express, Kirkby Drive, Telscombe Cliffs,	150	95%	142.5	£13,021	£1,855,493
PEACEHAVEN SOUTH COAST/TELESCOMBE	650		631.5		£5,581,962
Local Stores, Ringmer	310	100%	310	£4,000	£1,240,000
Local Stores , Newick	100	100%	100	£3,500	£350,000
Local Stores, Ditchling	60	100%	60	£3,500	£210,000
Local Stores, Ripe	*50*	*100%*	*50*	*£3,500*	*£175,000*
Local Stores, Chailey	60	100%	60	£3,500	£210,000
Local Stores, Firle	50	100%	50	£3,500	£175,000
Local Stores, Plumpton Green	80	100%	80	£3,500	£280,000
LEWES VILLAGES			710		£2,640,000

Notes: Sales Floorspaces derived from Lewes DC, GLH Surveys and Goad
Sales density is based upon published data (Verdict on Grocery Retailers) for the trading performance of the main national multiple convenience goods retailers. Experience based judgments are applied in the case of local convenience stores to reflect the type and mix of retai loffer present.
Proportion of conveneince and comparison goods in main food stores is based estimates made having inspected these stores.
(a) Co-Op Meridian centre has a significant proportion of floorspace dedicated to comaprsion goods and includes Peacocks clothing and a Pharmacy
Benchmark turnover is the product of sales floorspace and sales density.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table I: **Convenience Goods Turnover Capacity**

	2012			2016			2021			2026			2030		
	Market Share Turnover	Benchmark Turnover	Capacity	Market Share Turnover	Benchmark Turnover	Capacity	Market Share Turnover	Benchmark Turnover	Capacity	Market Share Turnover	Benchmark Turnover	Capacity	Market Share Turnover	Benchmark Turnover	Capacity
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Waitrose, Lewes	£17.796	£16.936	**£0.860**	£18.167	£16.936	**£1.231**	£18.602	£16.936	**£1.665**	£19.102	£16.936	**£2.166**	£19.512	£16.936	**£2.576**
Local Stores, Lewes TC	£3.786	£3.850	**-£0.064**	£3.865	£3.850	**£0.015**	£3.957	£3.850	**£0.107**	£4.064	£3.850	**£0.214**	£4.151	£3.850	**£0.301**
LEWES TOWN CENTRE			**£0.796**			**£1.246**			**£1.773**			**£2.379**			**£2.877**
Tesco, Lewes	£25.291	£24.844	**£0.447**	£25.819	£24.844	**£0.975**	£26.437	£24.844	**£1.593**	£27.148	£24.844	**£2.304**	£27.730	£24.844	**£2.886**
Aldi, Lewes	£3.002	£6.547	**-£3.545**	£3.064	£6.547	**-£3.482**	£3.138	£6.547	**-£3.409**	£3.222	£6.547	**-£3.324**	£3.291	£6.547	**-£3.255**
Local Stores, Lewes Not In Town Centre	£3.435	£3.435	**£0.000**	£3.507	£3.435	**£0.072**	£3.591	£3.435	**£0.156**	£3.687	£3.435	**£0.252**	£3.766	£3.435	**£0.331**
LEWES OUTSIDE TOWN CENTRE			**-£3.097**			**-£2.436**			**-£1.661**			**-£0.769**			**-£0.038**
Morrisons, Seaford	£26.606	£24.110	**£2.496**	£27.161	£24.110	**£3.051**	£27.811	£24.110	**£3.701**	£28.559	£24.110	**£4.449**	£29.172	£24.110	**£5.062**
Local Stores , Seaford	£5.062	£1.435	**£3.627**	£5.167	£1.435	**£3.732**	£5.291	£1.435	**£3.856**	£5.433	£1.435	**£3.998**	£5.550	£1.435	**£4.115**
Tesco Express, Seaford	£3.043	£3.092	**-£0.049**	£3.107	£3.092	**£0.014**	£3.181	£3.092	**£0.089**	£3.267	£3.092	**£0.174**	£3.337	£3.092	**£0.244**
Co-Op, Broad Street, Seaford	£2.488	£2.010	**£0.478**	£2.540	£2.010	**£0.530**	£2.600	£2.010	**£0.591**	£2.670	£2.010	**£0.660**	£2.728	£2.010	**£0.718**
Cost Cutter, Princes Drive, Seaford	£0.452	£0.599	**-£0.146**	£0.462	£0.599	**-£0.137**	£0.473	£0.599	**-£0.126**	£0.485	£0.599	**-£0.113**	£0.496	£0.599	**-£0.103**
SEAFORD			**£6.405**			**£7.190**			**£8.110**			**£9.168**			**£10.036**
Co-Op, Newhaven	£5.487	£10.579	**-£5.091**	£5.602	£10.579	**-£4.977**	£5.736	£10.579	**-£4.843**	£5.890	£10.579	**-£4.688**	£6.017	£10.579	**-£4.562**
Local Stores, Newhaven	£0.994	£0.315	**£0.679**	£1.014	£0.315	**£0.699**	£1.039	£0.315	**£0.724**	£1.067	£0.315	**£0.752**	£1.089	£0.315	**£0.774**
NEWHAVEN TOWN CENTRE			**-£4.412**			**-£4.277**			**-£4.119**			**-£3.937**			**-£3.788**
Sainsbury, Newhaven	£35.554	£26.676	**£8.878**	£36.295	£26.676	**£9.619**	£37.164	£26.676	**£10.487**	£38.163	£26.676	**£11.487**	£38.982	£26.676	**£12.306**
Lidl, Newhaven	£3.883	£2.887	**£0.996**	£3.964	£2.887	**£1.076**	£4.059	£2.887	**£1.171**	£4.168	£2.887	**£1.280**	£4.257	£2.887	**£1.370**
NEWHAVEN OUTSIDE TOWN CENTRE			**£9.873**			**£10.696**			**£11.659**			**£12.767**			**£13.676**
Co-Op, Meridian Centre, Peacehaven	£11.278	£11.683	**-£0.405**	£11.514	£11.683	**-£0.170**	£11.789	£11.683	**£0.106**	£12.106	£11.683	**£0.423**	£12.366	£11.683	**£0.682**
Local Stores, Peacehaven, Meridian Centre	£1.282	£0.595	**£0.687**	£1.308	£0.595	**£0.713**	£1.340	£0.595	**£0.745**	£1.376	£0.595	**£0.781**	£1.405	£0.595	**£0.810**
PEACEHAVEN MERIDIAN			**£0.282**			**£0.544**			**£0.850**			**£1.203**			**£1.493**
Local Stores, Peacehaven, South Coast Road	£0.472	£0.980	**-£0.508**	£0.482	£0.980	**-£0.498**	£0.493	£0.980	**-£0.487**	£0.507	£0.980	**-£0.473**	£0.517	£0.980	**-£0.463**
Sainsbury Local, Peacehaven (South Coast Road)	£1.542	£2.746	**-£1.204**	£1.575	£2.746	**-£1.172**	£1.612	£2.746	**-£1.134**	£1.656	£2.746	**-£1.091**	£1.691	£2.746	**-£1.055**
Tesco Express, Kirkby Drive, Telscombe Cliffs, Peacehaven	£2.900	£1.855	**£1.044**	£2.960	£1.855	**£1.105**	£3.031	£1.855	**£1.176**	£3.113	£1.855	**£1.257**	£3.179	£1.855	**£1.324**
PEACEHAVEN SOUTH COAST/TELESCOMBE			**-£0.668**			**-£0.565**			**-£0.445**			**-£0.307**			**-£0.194**
Local Stores, Ringmer	£2.237	£1.240	**£0.997**	£2.284	£1.240	**£1.044**	£2.339	£1.240	**£1.099**	£2.401	£1.240	**£1.161**	£2.453	£1.240	**£1.213**
OTHER LEWES VILLAGES			**£2.230**			**£3.346**			**£3.485**			**£3.645**			**£3.776**

Notes: Market share turnovers extracted from Tables H.1 to H.5;
Benchmark turnover from Table H
Turnover capacity is the product of market share turnover minus benchmark turnover.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table J: **Conveneince Goods Shopping Commitments (at 2012)**

Store/Location	Conveneince Goods Floorspace	Conveneince Goods Benchmark Turnover	Conveneince Goods Turnover
	sqm	£/sqm	£m
Tesco, Lewes	194	£13,021	£2.526
Sainsbury, Newhaven	235	£13,141	£3.088

Notes: Information supplied by Lewes DC
Turnovers based upon latest published trading densities for the retailers

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table K: **Study Area Comparison Goods Expenditure Per Head Estimates**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
All Comparison Goods									
2010	£3,306	£3,924	£3,895	£3,416	£3,046	£2,829	£2,915	£3,277	£3,713
2011	£3,399	£4,034	£4,004	£3,512	£3,131	£2,908	£2,997	£3,369	£3,817
2012	£3,494	£4,147	£4,116	£3,610	£3,219	£2,990	£3,081	£3,463	£3,924
2016	£3,902	£4,631	£4,597	£4,032	£3,595	£3,339	£3,440	£3,868	£4,382
2021	£4,479	£5,317	£5,278	£4,629	£4,127	£3,833	£3,950	£4,440	£5,031
2026	£5,143	£6,104	£6,059	£5,314	£4,738	£4,401	£4,534	£5,098	£5,776
2030	£5,743	£6,817	£6,767	£5,934	£5,292	£4,915	£5,064	£5,693	£6,450

Notes: Sourced from MMG3 Retail Planner 2011, Experian Business Strategies
Base year is 2011 in 2011 price base.
Expenditure growth is derived from Retail Planner Briefing Note 9 (September 2011) and uses long term growth forecasts from 2012 (Figure 2)
Main food and top up food spend split is 70:30.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table L: **Study Area Comparison Goods Expenditure Generated**

All Comparison Goods	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
2011	£58.37	£15.51	£23.51	£24.79	£75.49	£39.30	£56.29	£28.99	£36.65	£358.90
2012	£60.01	£15.95	£24.17	£25.48	£77.61	£40.41	£57.88	£29.81	£37.68	£369.01
2016	£67.07	£17.82	£27.02	£28.48	£86.74	£45.16	£64.68	£33.32	£42.11	£412.40
2021	£76.90	£20.43	£30.98	£32.65	£99.45	£51.78	£74.16	£38.20	£48.29	£472.85
2026	£88.42	£23.50	£35.62	£37.55	£114.36	£59.55	£85.28	£43.93	£55.52	£543.73
2030	£98.88	£26.28	£39.83	£41.99	£127.88	£66.58	£95.36	£49.12	£62.09	£608.01
Growth in Expenditure Potential 2011-2016	£8.70	£2.31	£3.50	£3.69	£11.25	£5.86	£8.39	£4.32	£5.46	£53.49
Growth in Expenditure Potential 2011-2021	£18.53	£4.92	£7.46	£7.87	£23.97	£12.48	£17.87	£9.21	£11.64	£113.94
Growth in Expenditure Potential 2011-2026	£30.06	£7.99	£12.11	£12.76	£38.87	£20.24	£28.99	£14.93	£18.87	£184.82
Growth in Expenditure Potential 2011-2030	£40.51	£10.77	£16.32	£17.20	£52.39	£27.28	£39.07	£20.12	£25.44	£249.10

Notes: Product of population (Table A) and expenditure per head (Table K)

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.1: Comparison Goods Shopping - Clothing, footwear and other fashion goods *Weighting applied*

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	21.68%	25.96%	6.92%	15.29%	1.00%	3.19%	1.03%	2.50%	3.17%	7.17%
Lewes, Tesco	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Lewes, Brooks Road Retail Park	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Seaford	0.53%	1.82%	0.00%	0.00%	11.44%	5.80%	1.55%	0.00%	0.00%	3.74%
Newhaven	0.53%	0.00%	0.00%	0.00%	1.36%	6.42%	1.05%	1.25%	0.00%	1.37%
Newhaven, The Drove Retail Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.64%	0.00%	0.00%	0.00%	0.08%
Peacehaven (Meridian Centre)	0.00%	0.00%	0.00%	0.00%	0.34%	0.00%	5.11%	0.00%	0.00%	0.84%
Peacehaven (South Coast Road)	0.00%	0.00%	0.00%	0.00%	0.32%	0.00%	0.00%	0.00%	0.00%	0.08%
Ringmer	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Newick	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Ditchling	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Kingston near Lewes	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Outside Lewes District										
Brighton	41.81%	29.72%	21.13%	35.25%	19.97%	35.51%	48.09%	51.05%	35.79%	35.01%
Brighton Retail Parks/Large Foodstores	0.53%	1.82%	4.07%	0.00%	0.66%	1.27%	2.54%	2.21%	0.00%	1.22%
Eastbourne	10.56%	7.39%	4.28%	15.42%	45.11%	25.88%	22.23%	13.59%	2.43%	21.51%
Eastbourne Retail Parks/Large Foodstores	0.53%	0.00%	0.00%	4.40%	4.31%	9.68%	0.53%	0.00%	0.00%	2.67%
Haywards Heath	1.05%	7.39%	16.84%	0.76%	0.00%	0.00%	0.00%	0.00%	13.82%	2.82%
Tunbridge Wells	1.59%	1.82%	11.21%	1.51%	1.02%	0.00%	0.53%	1.94%	0.78%	1.60%
Tunbridge Wells, Retail Warehousing	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Shoreham-by-Sea	0.00%	1.82%	1.21%	3.64%	0.66%	0.00%	1.03%	4.44%	4.82%	1.53%
Central London	2.65%	1.82%	0.00%	3.93%	1.02%	0.00%	2.57%	8.47%	4.03%	2.37%
Croydon	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.97%	0.00%	0.08%
Crawley	1.05%	5.51%	10.78%	0.00%	0.34%	0.00%	1.58%	1.25%	11.13%	2.44%
Burgess Hill	1.58%	1.87%	6.49%	0.00%	0.00%	0.00%	0.00%	0.00%	9.56%	1.60%
Uckfield	1.06%	0.00%	2.64%	1.67%	0.00%	0.00%	0.00%	0.00%	0.00%	0.46%
Hove	0.53%	0.00%	0.00%	0.91%	0.00%	0.00%	1.55%	0.00%	0.78%	0.46%
Bluewater	0.00%	0.00%	2.42%	0.76%	0.32%	0.00%	0.50%	2.50%	0.78%	0.61%
Horsham	0.00%	0.00%	1.21%	0.00%	0.34%	0.64%	0.00%	0.00%	0.00%	0.23%
Horsham, Broadbridge Heath Retail Park	0.53%	0.00%	0.00%	0.00%	0.34%	0.00%	0.00%	0.00%	0.00%	0.15%
Worthing	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.53%	1.25%	0.00%	0.15%
Hailsham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.53%	0.00%	0.00%	0.08%
Heathfield	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%	0.15%
Sevenoaks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Hassocks	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sevenoaks, Retail Warehousing	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bexhill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other	1.59%	0.00%	2.42%	2.26%	0.34%	1.94%	0.50%	2.21%	0.82%	1.22%
* Internet	4.24%	7.50%	6.92%	6.21%	5.90%	7.09%	4.06%	3.19%	4.78%	5.34%
* Catalogue/Mail Order	5.83%	5.57%	1.43%	8.03%	5.23%	1.96%	4.53%	3.19%	6.50%	4.80%

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.2: Comparison Goods Shopping - Chemist and personal care goods including cosmetics

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	85.09%	68.75%	16.67%	50%	0%	0%	0.80%	1.59%	1.39%	**20.50%**
Lewes, Tesco	4.39%	0%	0%	1.47%	0%	0%	0%	1.59%	0%	**0.88%**
Lewes, Brooks Road Retail Park	0%	0%	0%	0%	0%	1.06%	0%	0%	0%	**0.13%**
Seaford	0.00%	0.00%	0.00%	0.00%	85.94%	4.26%	0.80%	0.00%	0.00%	**20.63%**
Newhaven	0%	3.12%	0%	0%	2.70%	78.72%	4%	7.94%	0%	**11.32%**
Newhaven, The Drove Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Peacehaven (Meridian Centre)	0.88%	0%	0%	0%	0%	0%	36%	0%	0%	**5.79%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0%	0%	16.80%	0%	0%	**2.64%**
Ringmer	0%	0%	0%	23.53%	0%	0%	0%	0%	0%	**2.01%**
Newick	0%	0%	30.95%	0%	0%	0%	0%	0%	0%	**1.64%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	4.17%	**0.38%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	2.63%	3.12%	4.76%	4.41%	2.16%	3.19%	21.60%	26.98%	6.94%	**8.18%**
Brighton Retail Parks/Large Foodstores	2.63%	0.00%	0.00%	0.00%	0.00%	1.06%	10.40%	4.76%	1.39%	**2.64%**
Eastbourne	1.75%	0%	0%	5.88%	5.95%	4.26%	2.40%	0%	0%	**3.02%**
Eastbourne Retail Parks/Large Foodstores	0.00%	0.00%	0.00%	0.00%	0.54%	1.06%	0.00%	0.00%	0.00%	**0.26%**
Haywards Heath	0%	6.25%	14.29%	0%	0%	0%	0%	0%	15.28%	**2.39%**
Tunbridge Wells	0%	0%	2.38%	0%	0%	0%	0%	0%	0%	**0.13%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0.88%	0%	0%	0%	1.08%	0%	0%	0%	0%	**0.38%**
Croydon	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Crawley	0%	0%	2.38%	0%	0%	0%	0.80%	0%	0%	**0.25%**
Burgess Hill	0%	18.75%	4.76%	0%	0%	0%	0%	0%	37.50%	**4.40%**
Uckfield	0.88%	0%	7.14%	2.94%	0%	0%	0%	0%	0%	**0.75%**
Hove	0%	0%	0%	1.47%	0%	0%	0%	1.59%	1.39%	**0.38%**
Bluewater	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	5.88%	0%	0%	0%	0%	0%	**0.50%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	1.06%	0%	0%	0%	**0.13%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	23.61%	**2.14%**
Saltdean	0%	0%	0%	0%	0%	0%	0.80%	47.62%	1.39%	**4.03%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0%	0%	11.90%	2.94%	0%	2.13%	0.80%	4.76%	1.39%	**1.76%**
* Internet	0.88%	0%	2.38%	1.47%	1.08%	1.06%	3.20%	1.59%	4.17%	**1.76%**
* Catalogue/Mail Order	0%	0%	2.38%	0%	0.54%	2.13%	1.60%	1.59%	1.39%	**1.01%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.3: Comparison Goods Shopping - Books, DVD's, CD's, stationery and cards

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	57.94%	46.67%	7.50%	37.50%	0.61%	3.49%	0.86%	0%	2.82%	**14.93%**
Lewes, Tesco	2.80%	0%	0%	4.69%	0%	0%	0%	0%	0%	**0.81%**
Lewes, Brooks Road Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Seaford	0.93%	0%	0%	0%	49.70%	10.47%	1.72%	1.72%	0%	**12.89%**
Newhaven	0%	3.33%	0%	0%	1.21%	31.40%	2.59%	3.45%	0%	**4.75%**
Newhaven, The Drove Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0%	0%	24.14%	0%	0%	**3.80%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0%	0%	0.86%	1.72%	0%	**0.27%**
Ringmer	0%	0%	0%	1.56%	0%	0%	0%	0%	0%	**0.14%**
Newick	0%	0%	2.50%	0%	0%	0%	0%	0%	0%	**0.14%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	7.48%	3.33%	2.50%	6.25%	4.24%	8.14%	27.59%	46.55%	11.27%	**12.89%**
Brighton Retail Parks/Large Foodstores	1.87%	0.00%	0.00%	0.00%	0.00%	0.00%	7.76%	5.17%	0.00%	**1.90%**
Eastbourne	2.80%	0%	0%	4.69%	13.94%	11.63%	7.76%	0%	0%	**6.51%**
Eastbourne Retail Parks/Large Foodstores	0.93%	0.00%	0.00%	0.00%	1.83%	2.32%	0.00%	0.00%	0.00%	**0.83%**
Haywards Heath	0%	6.67%	15%	1.56%	0%	0%	0%	0%	15.49%	**2.71%**
Tunbridge Wells	0%	0%	5%	0%	0%	0%	0%	0%	0%	**0.27%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0.93%	0%	0%	0%	0.61%	0%	0%	0%	1.41%	**0.41%**
Croydon	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Crawley	0%	0%	0%	0%	0%	0%	0%	0%	1.41%	**0.14%**
Burgess Hill	1.87%	16.67%	7.50%	0%	0%	0%	0%	0%	29.58%	**4.21%**
Uckfield	0.93%	0%	5%	1.56%	0%	0%	0%	0%	0%	**0.54%**
Hove	0%	0%	0%	1.56%	0%	0%	0.86%	1.72%	0%	**0.41%**
Bluewater	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham	0%	0%	0%	0%	0%	0%	0.86%	0%	0%	**0.14%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	3.12%	0%	1.16%	0%	0%	0%	**0.41%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	8.45%	**0.81%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	12.07%	0%	**0.95%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0%	3.33%	5%	0%	1.82%	2.33%	0%	1.72%	1.41%	**1.36%**
* Internet	15.89%	20%	47.50%	31.25%	25.45%	26.74%	23.28%	20.69%	28.17%	**25.24%**
* Catalogue/Mail Order	5.61%	0%	2.50%	6.25%	0.61%	2.33%	1.72%	5.17%	0%	**2.58%**

TABLE M.4: Comparison Goods Shopping - Recreation and leisure goods including toys, sports goods, bicycles and accessories, hobbies, jewellery, pets/pet products

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	50.63%	37.50%	16.22%	36.54%	2.34%	7.25%	1.15%	0%	2.17%	**14.87%**
Lewes, Tesco	1.27%	0%	0%	0%	0%	0%	0%	0%	0%	**0.18%**
Lewes, Brooks Road Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Seaford	0%	0%	0%	0%	34.38%	4.35%	1.15%	0%	0%	**8.50%**
Newhaven	1.27%	0%	0%	1.92%	2.34%	20.29%	4.60%	2.33%	0%	**4.25%**
Newhaven, The Drove Retail Park	1.27%	0%	0%	0%	0%	5.80%	2.30%	2.33%	0%	**1.42%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0%	0%	1.15%	0%	0%	**0.18%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ringmer	0%	0%	0%	3.85%	0%	0%	0%	0%	0%	**0.35%**
Newick	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	16.46%	16.67%	10.81%	21.15%	6.25%	26.09%	44.83%	55.81%	30.43%	**23.89%**
Brighton Retail Parks/Large Foodstores	0.00%	4.17%	2.70%	0.00%	0.00%	0.00%	6.90%	4.65%	4.34%	**2.12%**
Eastbourne	7.59%	0%	0%	7.69%	28.91%	11.59%	5.75%	0%	0%	**10.62%**
Eastbourne Retail Parks/Large Foodstores	0.00%	4.17%	0.00%	0.00%	3.90%	7.25%	0.00%	0.00%	2.17%	**2.13%**
Haywards Heath	0%	8.33%	5.41%	0%	0%	0%	0%	0%	8.70%	**1.42%**
Tunbridge Wells	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0%	0%	0%	0%	0%	0%	0%	2.33%	0%	**0.18%**
Croydon	0%	0%	0%	0%	0.78%	0%	0%	0%	0%	**0.18%**
Crawley	0%	0%	8.11%	0%	0%	0%	0%	0%	2.17%	**0.71%**
Burgess Hill	0%	12.50%	8.11%	0%	0%	0%	0%	2.33%	26.09%	**3.36%**
Uckfield	0%	0%	10.81%	3.85%	0.78%	0%	0%	0%	0%	**1.24%**
Hove	1.27%	0%	0%	0%	0%	0%	2.30%	2.33%	2.17%	**0.88%**
Bluewater	0%	0%	0%	0%	0%	0%	0%	0%	2.17%	**0.18%**
Horsham	0%	0%	0%	0%	0%	1.45%	0%	0%	0%	**0.18%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	4.17%	0%	3.85%	0%	0%	0%	0%	0%	**0.53%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0%	4.17%	5.41%	1.92%	0.78%	0%	1.15%	0%	4.35%	**1.42%**
* Internet	8.86%	8.33%	32.43%	13.46%	15.62%	15.94%	27.59%	25.58%	15.22%	**17.88%**
* Catalogue/Mail Order	11.39%	0%	0%	5.77%	3.91%	0%	1.15%	2.33%	0%	**3.36%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.5: Comparison Goods Shopping - China, glass and home textile goods (china, pottery, glassware, cutlery, cookware, bed linens etc)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	51.04%	38.46%	11.43%	40.98%	2.67%	3.70%	0%	0%	5.45%	**14.89%**
Lewes, Tesco	4.17%	0%	0%	0%	0%	0%	0%	0%	0%	**0.61%**
Lewes, Brooks Road Retail Park	1.04%	0%	0%	0%	0%	0%	0%	2.17%	0%	**0.30%**
Seaford	0%	0%	2.86%	0%	18%	2.47%	0.93%	0%	0%	**4.71%**
Newhaven	0%	0%	0%	0%	0.67%	27.16%	3.70%	2.17%	0%	**4.26%**
Newhaven, The Drove Retail Park	0%	0%	0%	0%	0%	0%	0.93%	0%	0%	**0.15%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0%	0%	6.48%	0%	0%	**1.06%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ringmer	0%	0%	0%	0%	0%	1.23%	0%	0%	0%	**0.15%**
Newick	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	17.71%	23.08%	11.43%	21.31%	5.33%	28.40%	48.15%	65.22%	25.45%	**25.38%**
Brighton Retail Parks/Large Foodstores	2.08%	0.00%	0.00%	0.00%	0.00%	2.46%	5.56%	2.17%	0.00%	**1.67%**
Eastbourne	6.25%	0%	0%	16.39%	50%	16.05%	8.33%	4.35%	0%	**17.48%**
Eastbourne Retail Parks/Large Foodstores	0.00%	3.85%	0.00%	0.00%	4.67%	6.16%	2.78%	0.00%	0.00%	**2.43%**
Haywards Heath	0%	3.85%	5.71%	0%	0%	0%	0%	0%	7.27%	**1.06%**
Tunbridge Wells	1.04%	0%	8.57%	0%	1.33%	0%	0%	0%	0%	**0.91%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	2.86%	0%	0.67%	0%	4.63%	2.17%	7.27%	**1.82%**
Central London	0%	0%	0%	3.28%	0.67%	0%	2.78%	4.35%	3.64%	**1.52%**
Croydon	1.04%	0%	0%	0%	0%	1.23%	2.78%	4.35%	0%	**1.06%**
Crawley	0%	0%	11.43%	0%	0%	0%	0%	0%	7.27%	**1.22%**
Burgess Hill	2.08%	7.69%	8.57%	0%	0%	0%	0%	4.35%	23.64%	**3.34%**
Uckfield	2.08%	0%	5.71%	3.28%	0%	0%	0%	0%	0%	**0.91%**
Hove	0%	0%	0%	0%	0%	0%	0.93%	0%	1.82%	**0.30%**
Bluewater	1.04%	0%	5.71%	0%	0%	0%	0%	0%	0%	**0.46%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	1.64%	0%	0%	0%	0%	0%	**0.15%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0.67%	0%	0%	0%	0%	**0.15%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	1.04%	0%	5.71%	4.92%	2.67%	2.47%	0.93%	0%	1.82%	**2.13%**
* Internet	3.12%	19.23%	14.29%	4.92%	10.67%	7.41%	6.48%	8.70%	16.36%	**8.81%**
* Catalogue/Mail Order	6.25%	3.85%	5.71%	3.28%	2%	1.23%	4.63%	0%	0%	**3.04%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.6: Comparison Goods Shopping - Household appliances, such as fridges, washing machines, kettles etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	11.82%	9.38%	9.76%	11.94%	0%	3.37%	0.83%	0%	1.52%	**4.32%**
Lewes, Tesco	2.73%	0%	0%	1.49%	0%	0%	0%	0%	0%	**0.52%**
Lewes, Brooks Road Retail Park	0.91%	0%	0%	1.49%	0%	0%	0%	1.64%	0%	**0.39%**
Seaford	0%	0%	0%	0%	10.11%	0%	0%	1.64%	0%	**2.49%**
Newhaven	0.91%	0%	0%	0%	2.25%	8.99%	0%	0%	0%	**1.70%**
Newhaven, The Drove Retail Park	0%	0%	0%	0%	0%	1.12%	1.67%	0%	0%	**0.39%**
Peacehaven (Meridian Centre)	0%	3.12%	0%	0%	0.56%	3.37%	8.33%	3.28%	0%	**2.23%**
Peacehaven (South Coast Road)	6.36%	9.38%	0%	1.49%	6.18%	17.98%	30%	22.95%	0%	**11.52%**
Ringmer	0%	0%	0%	1.49%	0%	0%	0%	0%	0%	**0.13%**
Newick	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	36.36%	15.62%	4.88%	17.91%	2.81%	14.61%	16.67%	24.59%	18.18%	**16.23%**
Brighton Retail Parks/Large Foodstores	4.55%	6.25%	4.88%	2.99%	0.56%	5.62%	5.83%	8.20%	1.52%	**3.92%**
Eastbourne	1.82%	3.12%	0%	7.46%	31.46%	11.24%	0.83%	0%	0%	**9.82%**
Eastbourne Retail Parks/Large Foodstores	2.73%	3.12%	0.00%	8.97%	20.22%	10.11%	2.50%	0.00%	0.00%	**7.59%**
Haywards Heath	0%	3.12%	21.95%	0%	0%	0%	0%	0%	9.09%	**2.09%**
Tunbridge Wells	0%	0%	0%	1.49%	0%	1.12%	0%	0%	0%	**0.26%**
Tunbridge Wells, Retail Warehousing	0%	0%	2.44%	0%	0.56%	0%	0%	0%	0%	**0.26%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0%	0%	0%	2.99%	0%	0%	0.83%	1.64%	3.03%	**0.79%**
Croydon	0.91%	0%	0%	0%	0%	0%	0%	1.64%	0%	**0.26%**
Crawley	0%	0%	2.44%	1.49%	0.56%	0%	0%	0%	3.03%	**0.65%**
Burgess Hill	0%	9.38%	7.32%	0%	0%	1.12%	0%	0%	28.79%	**3.40%**
Uckfield	1.82%	0%	4.88%	1.49%	0%	0%	0%	0%	0%	**0.65%**
Hove	0%	6.25%	0%	0%	0%	0%	9.17%	3.28%	7.58%	**2.62%**
Bluewater	0%	0%	0%	0%	0.56%	0%	0%	0%	0%	**0.13%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	1.49%	0%	0%	0%	0%	0%	**0.13%**
Heathfield	0%	0%	0%	2.99%	0%	0%	0%	0%	1.52%	**0.39%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0.91%	0%	2.44%	1.49%	0.56%	0%	0.83%	0%	1.52%	**0.79%**
* Internet	20.91%	31.25%	39.02%	22.39%	21.35%	19.10%	19.17%	26.23%	22.73%	**22.64%**
* Catalogue/Mail Order	7.27%	0%	0%	8.96%	2.25%	2.25%	3.33%	4.92%	1.52%	**3.66%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.7: Comparison Goods Shopping - Audio-visual equipment such as TVs DVD players, HiFi, cameras, computers etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	16.19%	6.45%	5%	15.38%	0%	4.88%	0%	0%	0%	**4.91%**
Lewes, Tesco	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Lewes, Brooks Road Retail Park	0%	0%	0%	0%	0%	0%	0%	1.85%	0%	**0.14%**
Seaford	0.95%	0%	0%	0%	5.62%	3.66%	0.92%	3.70%	0%	**2.24%**
Newhaven	0%	0%	0%	0%	0.62%	6.10%	0%	0%	0%	**0.84%**
Newhaven, The Drove Retail Park	0%	0%	0%	0%	0%	0%	0.92%	0%	0%	**0.14%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0%	1.22%	4.59%	0%	0%	**0.84%**
Peacehaven (South Coast Road)	0.95%	0%	0%	0%	0%	0%	2.75%	0%	0%	**0.56%**
Ringmer	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Newick	0%	0%	2.50%	0%	0%	0%	0%	0%	0%	**0.14%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	34.29%	19.35%	7.50%	12.31%	3.75%	15.85%	30.28%	35.19%	23.88%	**19.64%**
Brighton Retail Parks/Large Foodstores	4.76%	12.90%	2.50%	1.54%	0.62%	9.76%	6.42%	7.41%	2.99%	**4.63%**
Eastbourne	2.86%	0%	0%	7.69%	31.87%	12.20%	1.83%	0%	0%	**9.96%**
Eastbourne Retail Parks/Large Foodstores	1.90%	3.23%	2.50%	10.78%	26.87%	10.98%	0.92%	1.85%	0.00%	**9.11%**
Haywards Heath	0%	3.23%	12.50%	0%	0%	0%	0%	0%	4.48%	**1.26%**
Tunbridge Wells	0.95%	0%	2.50%	1.54%	0%	0%	0%	0%	0%	**0.42%**
Tunbridge Wells, Retail Warehousing	0%	0%	2.50%	0%	0%	0%	0%	0%	0%	**0.14%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0%	0%	0%	3.08%	0%	0%	0.92%	3.70%	1.49%	**0.84%**
Croydon	0%	0%	0%	0%	0%	0%	0%	0%	1.49%	**0.14%**
Crawley	0%	0%	7.50%	1.54%	0%	0%	0%	0%	4.48%	**0.98%**
Burgess Hill	0%	6.45%	2.50%	0%	0%	1.22%	0%	0%	17.91%	**2.24%**
Uckfield	0.95%	0%	2.50%	0%	0%	0%	0%	0%	0%	**0.28%**
Hove	0.95%	3.23%	0%	0%	0.62%	2.44%	14.68%	11.11%	5.97%	**4.35%**
Bluewater	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	1.54%	0.62%	0%	0.92%	0%	0%	**0.42%**
Other	0.95%	0%	2.50%	0%	1.25%	2.44%	1.83%	1.85%	2.99%	**1.54%**
* Internet	24.76%	45.16%	47.50%	30.77%	26.25%	25.61%	29.36%	25.93%	32.84%	**29.45%**
* Catalogue/Mail Order	9.52%	0%	0%	13.85%	1.88%	3.66%	3.67%	7.41%	1.49%	**4.77%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.8: Comparison Goods Shopping - Furniture, soft furnishings and carpets

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	41.49%	18.52%	5.13%	26.32%	2.11%	4%	1.94%	0%	3.70%	**11.22%**
Lewes, Tesco	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Lewes, Brooks Road Retail Park	3.19%	3.70%	0%	0%	0.70%	0%	0%	0%	0%	**0.79%**
Seaford	0%	0%	0%	0%	34.51%	8%	1.94%	2.38%	0%	**9.16%**
Newhaven	0%	0%	0%	3.51%	6.34%	32%	4.85%	4.76%	0%	**6.64%**
Newhaven, The Drove Retail Park	2.13%	3.70%	0%	1.75%	2.11%	6.67%	8.74%	7.14%	0%	**3.79%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0.70%	0%	4.85%	0%	0%	**0.95%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0.70%	1.33%	17.48%	9.52%	0%	**3.79%**
Ringmer	0%	0%	0%	1.75%	0%	0%	0%	0%	0%	**0.16%**
Newick	0%	0%	2.56%	0%	0%	0%	0%	0%	0%	**0.16%**
Ditchling	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Kingston near Lewes	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Outside Lewes District										
Brighton	27.66%	22.22%	2.56%	8.77%	9.86%	13.33%	15.53%	45.24%	38.89%	**18.64%**
Brighton Retail Parks/Large Foodstores	2.13%	7.41%	5.13%	5.26%	1.41%	5.33%	3.88%	4.76%	0.00%	**3.32%**
Eastbourne	3.19%	0%	0%	8.77%	19.01%	6.67%	2.91%	2.38%	0%	**6.95%**
Eastbourne Retail Parks/Large Foodstores	2.12%	3.70%	0.00%	5.26%	7.04%	6.66%	1.94%	0.00%	0.00%	**3.64%**
Haywards Heath	0%	0%	15.38%	0%	0%	0%	0%	0%	3.70%	**1.26%**
Tunbridge Wells	0%	3.70%	12.82%	3.51%	0.70%	0%	0%	0%	1.85%	**1.58%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	3.88%	4.76%	0%	**0.95%**
Central London	1.06%	0%	0%	1.75%	1.41%	0%	0%	4.76%	1.85%	**1.11%**
Croydon	4.26%	3.70%	2.56%	3.51%	0%	1.33%	3.88%	0%	3.70%	**2.37%**
Crawley	0%	3.70%	5.13%	1.75%	0%	0%	0%	0%	3.70%	**0.95%**
Burgess Hill	0%	14.81%	5.13%	0%	0%	0%	0%	0%	18.52%	**2.53%**
Uckfield	0%	0%	12.82%	7.02%	0.70%	0%	0.97%	0%	0%	**1.74%**
Hove	1.06%	0%	2.56%	0%	2.82%	0%	12.62%	7.14%	5.56%	**3.95%**
Bluewater	0%	0%	2.56%	1.75%	0.70%	0%	0%	0%	1.85%	**0.63%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0%	0%	0%	0%	0.70%	0%	0%	0%	0%	**0.16%**
Heathfield	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0%	0%	5.13%	3.51%	0.70%	1.33%	1.94%	0%	0%	**1.26%**
* Internet	5.32%	14.81%	15.38%	12.28%	5.63%	10.67%	10.68%	7.14%	12.96%	**9.32%**
* Catalogue/Mail Order	6.38%	0%	5.13%	3.51%	2.11%	2.67%	1.94%	0%	3.70%	**3%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE M.9: Comparison Goods Shopping - Do-it-Yourself goods, decorating supplies and garden products

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	59.22%	30%	13.16%	52.24%	0%	1.12%	0%	0%	3.12%	**15.78%**
Lewes, Tesco	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Lewes, Brooks Road Retail Park	19.42%	3.33%	15.79%	8.95%	0%	1.12%	0.91%	0%	3%	**5.16%**
Seaford	0%	0%	0%	0%	25.93%	1.12%	0.91%	1.89%	0%	**6.28%**
Newhaven	1.94%	10%	0%	2.99%	27.16%	53.93%	19.09%	9.43%	0%	**17.46%**
Newhaven, The Drove Retail Park	1.94%	10.00%	0.00%	4.48%	37.03%	39.33%	63.63%	35.85%	0.00%	**26.81%**
Peacehaven (Meridian Centre)	0%	0%	0%	0%	0%	0%	2.73%	0%	0%	**0.42%**
Peacehaven (South Coast Road)	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ringmer	0%	0%	0%	5.97%	0%	0%	0%	0%	0%	**0.56%**
Newick	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Ditchling	0%	10%	10.53%	0%	0%	0%	0%	0%	1.56%	**1.12%**
Kingston near Lewes	5.83%	3.33%	0%	2.99%	0.62%	1.12%	0.91%	0%	0%	**1.68%**
Outside Lewes District										
Brighton	3.88%	6.67%	0%	0%	0%	0%	1.82%	32.08%	7.81%	**4.19%**
Brighton Retail Parks/Large Foodstores	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.73%	3.78%	0.00%	**0.70%**
Eastbourne	0.97%	0%	0%	2.99%	4.94%	1.12%	0.91%	0%	0%	**1.82%**
Eastbourne Retail Parks/Large Foodstores	0.00%	0.00%	0.00%	0.00%	1.85%	0.00%	0.00%	0.00%	0.00%	**0.42%**
Haywards Heath	0%	0%	2.63%	0%	0%	0%	0%	0%	7.81%	**0.84%**
Tunbridge Wells	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Tunbridge Wells, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Shoreham-by-Sea	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Central London	0.97%	0%	0%	0%	0%	0%	0%	0%	0%	**0.14%**
Croydon	0%	0%	5.26%	0%	0%	0%	0%	0%	1.56%	**0.42%**
Crawley	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Burgess Hill	0%	16.67%	21.05%	0%	0%	0%	0%	0%	50%	**6.28%**
Uckfield	0.97%	0%	28.95%	1.49%	0%	0%	0%	0%	0%	**1.82%**
Hove	0%	0%	0%	1.49%	0%	0%	0.91%	3.77%	4.69%	**0.98%**
Bluewater	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Horsham, Broadbridge Heath Retail Park	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Worthing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hailsham	0.97%	0%	0%	8.96%	0.62%	0%	0%	0%	0%	**1.12%**
Heathfield	0%	0%	0%	1.49%	0%	0%	0%	0%	1.56%	**0.28%**
Sevenoaks	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Hassocks	0%	3.33%	0%	0%	0%	0%	0%	0%	15.62%	**1.54%**
Saltdean	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sevenoaks, Retail Warehousing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Bexhill	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Other	0%	3.33%	0%	2.99%	0.62%	0%	0%	5.66%	3.12%	**1.26%**
* Internet	2.91%	3.33%	0%	1.49%	1.23%	0%	2.73%	1.89%	0%	**1.54%**
* Catalogue/Mail Order	0.97%	0%	2.63%	1.49%	0%	1.12%	2.73%	5.66%	0%	**1.40%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE N: Comparison Goods Shopping - Combined Categories

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Lewes	44.01%	33.52%	10.53%	30.91%	1.06%	3.58%	0.85%	0.87%	2.54%	**12.17%**
Lewes, Tesco	1.49%	0.00%	0.00%	0.59%	0.00%	0.00%	0.00%	0.22%	0.00%	**0.28%**
Lewes, Brooks Road Retail Park	2.14%	0.61%	1.32%	0.80%	0.06%	0.24%	0.08%	0.34%	0.26%	**0.58%**
Seaford	0.29%	0.47%	0.15%	0.00%	31.75%	4.89%	1.22%	0.88%	0.00%	**8.18%**
Newhaven	0.56%	1.51%	0.00%	0.91%	4.25%	28.22%	4.08%	3.43%	0.00%	**5.46%**
Newhaven, The Drove Retail Park	0.58%	1.17%	0.00%	0.53%	3.29%	5.14%	6.72%	4.07%	0.00%	**2.90%**
Peacehaven (Meridian Centre)	0.12%	0.10%	0.00%	0.00%	0.17%	0.22%	9.97%	0.11%	0.00%	**1.66%**
Peacehaven (South Coast Road)	0.30%	0.31%	0.00%	0.05%	0.35%	0.72%	5.21%	1.74%	0.00%	**1.18%**
Ringmer	0.00%	0.00%	0.00%	4.79%	0.00%	0.07%	0.00%	0.00%	0.00%	**0.43%**
Newick	0.00%	0.00%	4.94%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.27%**
Ditchling	0.00%	0.84%	0.88%	0.00%	0.00%	0.00%	0.00%	0.00%	0.71%	**0.15%**
Kingston near Lewes	0.49%	0.28%	0.00%	0.25%	0.05%	0.09%	0.08%	0.00%	0.00%	**0.14%**
Outside Lewes District										
Brighton	22.73%	17.42%	9.94%	17.63%	8.49%	19.55%	32.92%	44.58%	24.77%	**21.11%**
Brighton Retail Parks/Large Foodstores	1.52%	3.25%	2.38%	0.71%	0.37%	2.15%	5.55%	4.24%	1.30%	**2.19%**
Eastbourne	5.57%	2.01%	1.11%	9.39%	27.43%	13.23%	8.65%	3.96%	0.63%	**11.30%**
Eastbourne Retail Parks/Large Foodstores	0.65%	1.69%	0.23%	2.88%	6.15%	6.38%	0.63%	0.17%	0.39%	**2.73%**
Haywards Heath	0.27%	5.36%	12.15%	0.31%	0.00%	0.00%	0.00%	0.00%	10.46%	**1.93%**
Tunbridge Wells	0.55%	0.80%	5.42%	0.89%	0.40%	0.04%	0.14%	0.50%	0.37%	**0.69%**
Tunbridge Wells, Retail Warehousing	0.14%	0.00%	0.31%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	**0.04%**
Shoreham-by-Sea	0.00%	0.47%	0.47%	0.94%	0.21%	0.00%	0.86%	1.69%	1.64%	**0.58%**
Central London	1.05%	0.47%	0.00%	1.73%	0.62%	0.00%	0.93%	3.66%	1.74%	**1.02%**
Croydon	0.47%	0.33%	0.67%	0.31%	0.14%	0.19%	0.50%	0.54%	0.60%	**0.38%**
Crawley	0.27%	1.75%	6.41%	0.34%	0.11%	0.00%	0.52%	0.32%	4.60%	**1.06%**
Burgess Hill	0.65%	10.57%	7.49%	0.00%	0.00%	0.15%	0.00%	0.66%	24.21%	**3.18%**
Uckfield	0.80%	0.00%	8.25%	2.63%	0.20%	0.00%	0.09%	0.00%	0.00%	**0.89%**
Hove	0.55%	0.50%	0.23%	0.68%	0.31%	0.22%	3.76%	2.83%	2.57%	**1.29%**
Bluewater	0.06%	0.00%	1.16%	0.35%	0.16%	0.00%	0.13%	0.65%	0.76%	**0.28%**
Horsham	0.00%	0.00%	0.31%	0.00%	0.09%	0.43%	0.06%	0.00%	0.00%	**0.10%**
Horsham, Broadbridge Heath Retail Park	0.14%	0.00%	0.00%	0.00%	0.09%	0.00%	0.00%	0.00%	0.00%	**0.04%**
Worthing	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.14%	0.32%	0.00%	**0.04%**
Hailsham	0.08%	0.75%	0.00%	2.63%	0.11%	0.08%	0.14%	0.00%	0.00%	**0.33%**
Heathfield	0.14%	0.00%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%	0.38%	**0.08%**
Sevenoaks	0.00%	0.00%	0.00%	0.00%	0.00%	0.15%	0.00%	0.00%	0.00%	**0.02%**
Hassocks	0.00%	0.28%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.20%	**0.49%**
Saltdean	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	7.49%	0.19%	**0.63%**
Sevenoaks, Retail Warehousing	0.00%	0.00%	0.00%	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%	**0.01%**
Bexhill	0.00%	0.00%	0.00%	0.14%	0.06%	0.00%	0.08%	0.00%	0.00%	**0.04%**
Other	0.58%	1.27%	4.69%	2.22%	0.75%	1.44%	0.86%	2.00%	1.97%	**1.41%**
* Internet	7.76%	12.61%	19.07%	11.47%	10.56%	11.05%	12.94%	11.61%	12.32%	**11.49%**
* Catalogue/Mail Order	6.05%	1.65%	1.87%	5.72%	2.72%	1.77%	2.82%	3.14%	2.39%	**3.27%**

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE O.1: Comparison Goods Shopping - Combined Categories Implied Turnover **2012**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Lewes	£26.41	£5.35	£2.54	£7.88	£0.82	£1.45	£0.49	£0.26	£0.96	**£46.15**
Lewes, Tesco	£0.90	£0.00	£0.00	£0.15	£0.00	£0.00	£0.00	£0.07	£0.00	**£1.11**
Lewes, Brooks Road Retail Park	£1.28	£0.10	£0.32	£0.20	£0.05	£0.10	£0.04	£0.10	£0.10	**£2.29**
Seaford	£0.17	£0.08	£0.04	£0.00	£24.64	£1.98	£0.71	£0.26	£0.00	**£27.87**
Newhaven	£0.34	£0.24	£0.00	£0.23	£3.30	£11.41	£2.36	£1.02	£0.00	**£18.89**
Newhaven, The Drove Retail Park	£0.35	£0.19	£0.00	£0.14	£2.56	£2.08	£3.89	£1.21	£0.00	**£10.41**
Peacehaven (Meridian Centre)	£0.07	£0.02	£0.00	£0.00	£0.13	£0.09	£5.77	£0.03	£0.00	**£6.11**
Peacehaven (South Coast Road)	£0.18	£0.05	£0.00	£0.01	£0.27	£0.29	£3.01	£0.52	£0.00	**£4.33**
Ringmer	£0.00	£0.00	£0.00	£1.22	£0.00	£0.03	£0.00	£0.00	£0.00	**£1.25**
Newick	£0.00	£0.00	£1.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£1.20**
Ditchling	£0.00	£0.13	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	**£0.62**
Kingston near Lewes	£0.29	£0.04	£0.00	£0.06	£0.04	£0.04	£0.04	£0.00	£0.00	**£0.52**
Outside Lewes District										
Brighton	£13.64	£2.78	£2.40	£4.49	£6.59	£7.90	£19.05	£13.29	£9.33	**£79.48**
Brighton Retail Parks/Large Foodstores	£0.91	£0.52	£0.58	£0.18	£0.29	£0.87	£3.21	£1.26	£0.49	**£8.31**
Eastbourne	£3.34	£0.32	£0.27	£2.39	£21.29	£5.35	£5.01	£1.18	£0.24	**£39.38**
Eastbourne Retail Parks/Large Foodstores	£0.39	£0.27	£0.05	£0.73	£4.77	£2.58	£0.36	£0.05	£0.15	**£9.36**
Haywards Heath	£0.16	£0.85	£2.94	£0.08	£0.00	£0.00	£0.00	£0.00	£3.94	**£7.97**
Tunbridge Wells	£0.33	£0.13	£1.31	£0.23	£0.31	£0.02	£0.08	£0.15	£0.14	**£2.69**
Tunbridge Wells, Retail Warehousing	£0.08	£0.00	£0.07	£0.00	£0.01	£0.00	£0.00	£0.00	£0.00	**£0.17**
Shoreham-by-Sea	£0.00	£0.08	£0.11	£0.24	£0.16	£0.00	£0.50	£0.50	£0.62	**£2.21**
Central London	£0.63	£0.08	£0.00	£0.44	£0.48	£0.00	£0.54	£1.09	£0.66	**£3.91**
Croydon	£0.28	£0.05	£0.16	£0.08	£0.11	£0.07	£0.29	£0.16	£0.22	**£1.43**
Crawley	£0.16	£0.28	£1.55	£0.09	£0.08	£0.00	£0.30	£0.10	£1.73	**£4.29**
Burgess Hill	£0.39	£1.69	£1.81	£0.00	£0.00	£0.06	£0.00	£0.20	£9.12	**£13.27**
Uckfield	£0.48	£0.00	£2.00	£0.67	£0.16	£0.00	£0.05	£0.00	£0.00	**£3.35**
Hove	£0.33	£0.08	£0.06	£0.17	£0.24	£0.09	£2.17	£0.84	£0.97	**£4.95**
Bluewater	£0.03	£0.00	£0.28	£0.09	£0.13	£0.00	£0.07	£0.19	£0.29	**£1.09**
Horsham	£0.00	£0.00	£0.08	£0.00	£0.07	£0.17	£0.04	£0.00	£0.00	**£0.35**
Horsham, Broadbridge Heath Retail Park	£0.08	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	**£0.15**
Worthing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.10	£0.00	**£0.18**
Hailsham	£0.05	£0.12	£0.00	£0.67	£0.09	£0.03	£0.08	£0.00	£0.00	**£1.04**
Heathfield	£0.08	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.14	**£0.28**
Sevenoaks	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	**£0.06**
Hassocks	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.96	**£2.00**
Saltdean	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£2.23	£0.07	**£2.37**
Sevenoaks, Retail Warehousing	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	**£0.03**
Bexhill	£0.00	£0.00	£0.00	£0.04	£0.04	£0.00	£0.05	£0.00	£0.00	**£0.13**
Other	£0.35	£0.20	£1.13	£0.57	£0.58	£0.58	£0.50	£0.60	£0.74	**£5.25**
* Internet	£4.66	£2.01	£4.61	£2.92	£8.20	£4.47	£7.49	£3.46	£4.64	**£42.46**
* Catalogue/Mail Order	£3.63	£0.26	£0.45	£1.46	£2.11	£0.72	£1.63	£0.94	£0.90	**£12.09**

Notes: Based upon market shares from the household survey
Market share percentages (Table N) applied to comparison goods expenditure available in study area on a zone by zone basis (Table L).

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE O.2: Comparison Goods Shopping - Combined Categories Implied Turnover **2016**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Lewes	£29.51	£5.97	£2.84	£8.80	£0.92	£1.62	£0.55	£0.29	£1.07	**£51.58**
Lewes, Tesco	£1.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.07	£0.00	**£1.24**
Lewes, Brooks Road Retail Park	£1.43	£0.11	£0.36	£0.23	£0.05	£0.11	£0.05	£0.11	£0.11	**£2.56**
Seaford	£0.19	£0.08	£0.04	£0.00	£27.54	£2.21	£0.79	£0.29	£0.00	**£31.15**
Newhaven	£0.37	£0.27	£0.00	£0.26	£3.68	£12.75	£2.64	£1.14	£0.00	**£21.11**
Newhaven, The Drove Retail Park	£0.39	£0.21	£0.00	£0.15	£2.86	£2.32	£4.35	£1.35	£0.00	**£11.63**
Peacehaven (Meridian Centre)	£0.08	£0.02	£0.00	£0.00	£0.15	£0.10	£6.45	£0.04	£0.00	**£6.83**
Peacehaven (South Coast Road)	£0.20	£0.06	£0.00	£0.01	£0.30	£0.32	£3.37	£0.58	£0.00	**£4.84**
Ringmer	£0.00	£0.00	£0.00	£1.36	£0.00	£0.03	£0.00	£0.00	£0.00	**£1.39**
Newick	£0.00	£0.00	£1.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£1.34**
Ditchling	£0.00	£0.15	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.30	**£0.69**
Kingston near Lewes	£0.33	£0.05	£0.00	£0.07	£0.05	£0.04	£0.05	£0.00	£0.00	**£0.59**
Outside Lewes District										
Brighton	£15.24	£3.10	£2.68	£5.02	£7.37	£8.83	£21.29	£14.85	£10.43	**£88.82**
Brighton Retail Parks/Large Foodstores	£1.02	£0.58	£0.64	£0.20	£0.32	£0.97	£3.59	£1.41	£0.55	**£9.29**
Eastbourne	£3.73	£0.36	£0.30	£2.67	£23.79	£5.98	£5.59	£1.32	£0.26	**£44.01**
Eastbourne Retail Parks/Large Foodstores	£0.44	£0.30	£0.06	£0.82	£5.34	£2.88	£0.40	£0.06	£0.16	**£10.46**
Haywards Heath	£0.18	£0.96	£3.28	£0.09	£0.00	£0.00	£0.00	£0.00	£4.40	**£8.91**
Tunbridge Wells	£0.37	£0.14	£1.46	£0.25	£0.34	£0.02	£0.09	£0.17	£0.15	**£3.00**
Tunbridge Wells, Retail Warehousing	£0.09	£0.00	£0.08	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	**£0.19**
Shoreham-by-Sea	£0.00	£0.08	£0.13	£0.27	£0.18	£0.00	£0.56	£0.56	£0.69	**£2.47**
Central London	£0.70	£0.08	£0.00	£0.49	£0.54	£0.00	£0.60	£1.22	£0.73	**£4.37**
Croydon	£0.31	£0.06	£0.18	£0.09	£0.12	£0.08	£0.32	£0.18	£0.25	**£1.60**
Crawley	£0.18	£0.31	£1.73	£0.10	£0.09	£0.00	£0.34	£0.11	£1.94	**£4.80**
Burgess Hill	£0.44	£1.88	£2.02	£0.00	£0.00	£0.07	£0.00	£0.22	£10.19	**£14.83**
Uckfield	£0.54	£0.00	£2.23	£0.75	£0.18	£0.00	£0.06	£0.00	£0.00	**£3.75**
Hove	£0.37	£0.09	£0.06	£0.19	£0.27	£0.10	£2.43	£0.94	£1.08	**£5.53**
Bluewater	£0.04	£0.00	£0.31	£0.10	£0.14	£0.00	£0.08	£0.22	£0.32	**£1.21**
Horsham	£0.00	£0.00	£0.08	£0.00	£0.08	£0.19	£0.04	£0.00	£0.00	**£0.39**
Horsham, Broadbridge Heath Retail Park	£0.09	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	**£0.17**
Worthing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.11	£0.00	**£0.20**
Hailsham	£0.05	£0.13	£0.00	£0.75	£0.10	£0.04	£0.09	£0.00	£0.00	**£1.16**
Heathfield	£0.09	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.16	**£0.32**
Sevenoaks	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	**£0.07**
Hassocks	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.19	**£2.24**
Saltdean	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£2.50	£0.08	**£2.65**
Sevenoaks, Retail Warehousing	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	**£0.03**
Bexhill	£0.00	£0.00	£0.00	£0.04	£0.05	£0.00	£0.05	£0.00	£0.00	**£0.14**
Other	£0.39	£0.23	£1.27	£0.63	£0.65	£0.65	£0.56	£0.67	£0.83	**£5.87**
* Internet	£5.21	£2.25	£5.15	£3.27	£9.16	£4.99	£8.37	£3.87	£5.19	**£47.45**
* Catalogue/Mail Order	£4.06	£0.29	£0.50	£1.63	£2.36	£0.80	£1.82	£1.05	£1.01	**£13.51**

Notes: Based upon market shares from the household survey
Market share percentages (Table N) applied to comparison goods expenditure available in study area on a zone by zone basis (Table L).

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE O.3: Comparison Goods Shopping - Combined Categories Implied Turnover **2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Lewes	£33.84	£6.85	£3.26	£10.09	£1.05	£1.86	£0.63	£0.33	£1.23	**£59.14**
Lewes, Tesco	£1.15	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.08	£0.00	**£1.42**
Lewes, Brooks Road Retail Park	£1.64	£0.12	£0.41	£0.26	£0.06	£0.13	£0.06	£0.13	£0.13	**£2.94**
Seaford	£0.22	£0.10	£0.05	£0.00	£31.57	£2.53	£0.91	£0.34	£0.00	**£35.72**
Newhaven	£0.43	£0.31	£0.00	£0.30	£4.22	£14.61	£3.02	£1.31	£0.00	**£24.21**
Newhaven, The Drove Retail Park	£0.45	£0.24	£0.00	£0.17	£3.28	£2.66	£4.98	£1.55	£0.00	**£13.34**
Peacehaven (Meridian Centre)	£0.09	£0.02	£0.00	£0.00	£0.17	£0.11	£7.39	£0.04	£0.00	**£7.83**
Peacehaven (South Coast Road)	£0.23	£0.06	£0.00	£0.02	£0.35	£0.37	£3.86	£0.66	£0.00	**£5.55**
Ringmer	£0.00	£0.00	£0.00	£1.56	£0.00	£0.03	£0.00	£0.00	£0.00	**£1.60**
Newick	£0.00	£0.00	£1.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£1.53**
Ditchling	£0.00	£0.17	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34	**£0.79**
Kingston near Lewes	£0.38	£0.06	£0.00	£0.08	£0.05	£0.05	£0.06	£0.00	£0.00	**£0.67**
Outside Lewes District										
Brighton	£17.48	£3.56	£3.08	£5.76	£8.44	£10.12	£24.41	£17.03	£11.96	**£101.84**
Brighton Retail Parks/Large Foodstores	£1.17	£0.66	£0.74	£0.23	£0.37	£1.11	£4.12	£1.62	£0.63	**£10.65**
Eastbourne	£4.28	£0.41	£0.34	£3.07	£27.28	£6.85	£6.42	£1.51	£0.30	**£50.46**
Eastbourne Retail Parks/Large Foodstores	£0.50	£0.34	£0.07	£0.94	£6.12	£3.30	£0.46	£0.06	£0.19	**£11.99**
Haywards Heath	£0.21	£1.10	£3.76	£0.10	£0.00	£0.00	£0.00	£0.00	£5.05	**£10.22**
Tunbridge Wells	£0.43	£0.16	£1.68	£0.29	£0.39	£0.02	£0.10	£0.19	£0.18	**£3.44**
Tunbridge Wells, Retail Warehousing	£0.10	£0.00	£0.09	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	**£0.22**
Shoreham-by-Sea	£0.00	£0.10	£0.14	£0.31	£0.21	£0.00	£0.64	£0.65	£0.79	**£2.83**
Central London	£0.81	£0.10	£0.00	£0.56	£0.62	£0.00	£0.69	£1.40	£0.84	**£5.01**
Croydon	£0.36	£0.07	£0.21	£0.10	£0.14	£0.10	£0.37	£0.21	£0.29	**£1.83**
Crawley	£0.21	£0.36	£1.99	£0.11	£0.11	£0.00	£0.39	£0.12	£2.22	**£5.50**
Burgess Hill	£0.50	£2.16	£2.32	£0.00	£0.00	£0.08	£0.00	£0.25	£11.69	**£17.00**
Uckfield	£0.62	£0.00	£2.56	£0.86	£0.20	£0.00	£0.06	£0.00	£0.00	**£4.30**
Hove	£0.42	£0.10	£0.07	£0.22	£0.31	£0.11	£2.79	£1.08	£1.24	**£6.34**
Bluewater	£0.04	£0.00	£0.36	£0.11	£0.16	£0.00	£0.10	£0.25	£0.37	**£1.39**
Horsham	£0.00	£0.00	£0.10	£0.00	£0.09	£0.22	£0.05	£0.00	£0.00	**£0.45**
Horsham, Broadbridge Heath Retail Park	£0.10	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	**£0.19**
Worthing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.12	£0.00	**£0.22**
Hailsham	£0.06	£0.15	£0.00	£0.86	£0.11	£0.04	£0.10	£0.00	£0.00	**£1.33**
Heathfield	£0.10	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.19	**£0.36**
Sevenoaks	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	**£0.08**
Hassocks	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.51	**£2.57**
Saltdean	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£2.86	£0.09	**£3.04**
Sevenoaks, Retail Warehousing	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	**£0.04**
Bexhill	£0.00	£0.00	£0.00	£0.05	£0.06	£0.00	£0.06	£0.00	£0.00	**£0.16**
Other	£0.45	£0.26	£1.45	£0.73	£0.74	£0.74	£0.64	£0.76	£0.95	**£6.73**
* Internet	£5.97	£2.58	£5.91	£3.74	£10.50	£5.72	£9.60	£4.43	£5.95	**£54.41**
* Catalogue/Mail Order	£4.65	£0.34	£0.58	£1.87	£2.70	£0.92	£2.09	£1.20	£1.15	**£15.49**

Notes: Based upon market shares from the household survey
Market share percentages (Table N) applied to comparison goods expenditure available in study area on a zone by zone basis (Table L).

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE O.4: Comparison Goods Shopping - Combined Categories Implied Turnover **2026**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Lewes	£38.91	£7.88	£3.75	£11.61	£1.21	£2.13	£0.72	£0.38	£1.41	**£68.00**
Lewes, Tesco	£1.32	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.10	£0.00	**£1.64**
Lewes, Brooks Road Retail Park	£1.89	£0.14	£0.47	£0.30	£0.07	£0.14	£0.07	£0.15	£0.15	**£3.38**
Seaford	£0.25	£0.11	£0.06	£0.00	£36.31	£2.91	£1.04	£0.39	£0.00	**£41.07**
Newhaven	£0.49	£0.35	£0.00	£0.34	£4.86	£16.81	£3.48	£1.51	£0.00	**£27.84**
Newhaven, The Drove Retail Park	£0.51	£0.27	£0.00	£0.20	£3.77	£3.06	£5.73	£1.79	£0.00	**£15.34**
Peacehaven (Meridian Centre)	£0.11	£0.02	£0.00	£0.00	£0.19	£0.13	£8.50	£0.05	£0.00	**£9.01**
Peacehaven (South Coast Road)	£0.26	£0.07	£0.00	£0.02	£0.40	£0.43	£4.44	£0.76	£0.00	**£6.39**
Ringmer	£0.00	£0.00	£0.00	£1.80	£0.00	£0.04	£0.00	£0.00	£0.00	**£1.84**
Newick	£0.00	£0.00	£1.76	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£1.76**
Ditchling	£0.00	£0.20	£0.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	**£0.91**
Kingston near Lewes	£0.43	£0.07	£0.00	£0.09	£0.06	£0.06	£0.07	£0.00	£0.00	**£0.77**
Outside Lewes District										
Brighton	£20.10	£4.09	£3.54	£6.62	£9.71	£11.64	£28.07	£19.58	£13.75	**£117.11**
Brighton Retail Parks/Large Foodstores	£1.34	£0.76	£0.85	£0.27	£0.43	£1.28	£4.73	£1.86	£0.72	**£12.25**
Eastbourne	£4.92	£0.47	£0.39	£3.53	£31.37	£7.88	£7.38	£1.74	£0.35	**£58.02**
Eastbourne Retail Parks/Large Foodstores	£0.58	£0.40	£0.08	£1.08	£7.03	£3.80	£0.53	£0.07	£0.22	**£13.79**
Haywards Heath	£0.24	£1.26	£4.33	£0.12	£0.00	£0.00	£0.00	£0.00	£5.81	**£11.75**
Tunbridge Wells	£0.49	£0.19	£1.93	£0.33	£0.45	£0.02	£0.12	£0.22	£0.20	**£3.96**
Tunbridge Wells, Retail Warehousing	£0.12	£0.00	£0.11	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	**£0.25**
Shoreham-by-Sea	£0.00	£0.11	£0.17	£0.35	£0.24	£0.00	£0.74	£0.74	£0.91	**£3.26**
Central London	£0.93	£0.11	£0.00	£0.65	£0.71	£0.00	£0.79	£1.61	£0.97	**£5.76**
Croydon	£0.41	£0.08	£0.24	£0.12	£0.16	£0.11	£0.42	£0.24	£0.33	**£2.11**
Crawley	£0.24	£0.41	£2.28	£0.13	£0.12	£0.00	£0.44	£0.14	£2.55	**£6.33**
Burgess Hill	£0.58	£2.48	£2.67	£0.00	£0.00	£0.09	£0.00	£0.29	£13.44	**£19.55**
Uckfield	£0.71	£0.00	£2.94	£0.99	£0.23	£0.00	£0.07	£0.00	£0.00	**£4.94**
Hove	£0.48	£0.12	£0.08	£0.25	£0.35	£0.13	£3.20	£1.24	£1.42	**£7.29**
Bluewater	£0.05	£0.00	£0.41	£0.13	£0.19	£0.00	£0.11	£0.28	£0.42	**£1.60**
Horsham	£0.00	£0.00	£0.11	£0.00	£0.10	£0.25	£0.05	£0.00	£0.00	**£0.52**
Horsham, Broadbridge Heath Retail Park	£0.12	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	**£0.22**
Worthing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.14	£0.00	**£0.26**
Hailsham	£0.07	£0.18	£0.00	£0.99	£0.13	£0.05	£0.12	£0.00	£0.00	**£1.53**
Heathfield	£0.12	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.21	**£0.42**
Sevenoaks	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	**£0.09**
Hassocks	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.89	**£2.95**
Saltdean	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£3.29	£0.11	**£3.49**
Sevenoaks, Retail Warehousing	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	**£0.04**
Bexhill	£0.00	£0.00	£0.00	£0.05	£0.06	£0.00	£0.07	£0.00	£0.00	**£0.19**
Other	£0.52	£0.30	£1.67	£0.83	£0.86	£0.85	£0.74	£0.88	£1.09	**£7.74**
* Internet	£6.86	£2.96	£6.79	£4.31	£12.08	£6.58	£11.04	£5.10	£6.84	**£62.57**
* Catalogue/Mail Order	£5.35	£0.39	£0.66	£2.15	£3.11	£1.05	£2.40	£1.38	£1.33	**£17.82**

Notes: Based upon market shares from the household survey
Market share percentages (Table N) applied to comparison goods expenditure available in study area on a zone by zone basis (Table L).

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE O.5: Comparison Goods Shopping - Combined Categories Implied Turnover **2030**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Lewes	£43.51	£8.81	£4.19	£12.98	£1.35	£2.39	£0.81	£0.43	£1.58	**£76.04**
Lewes, Tesco	£1.48	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.11	£0.00	**£1.83**
Lewes, Brooks Road Retail Park	£2.11	£0.16	£0.53	£0.34	£0.08	£0.16	£0.07	£0.17	£0.16	**£3.78**
Seaford	£0.28	£0.12	£0.06	£0.00	£40.60	£3.26	£1.17	£0.43	£0.00	**£45.93**
Newhaven	£0.55	£0.40	£0.00	£0.38	£5.43	£18.79	£3.89	£1.68	£0.00	**£31.13**
Newhaven, The Drove Retail Park	£0.58	£0.31	£0.00	£0.22	£4.21	£3.42	£6.41	£2.00	£0.00	**£17.15**
Peacehaven (Meridian Centre)	£0.12	£0.03	£0.00	£0.00	£0.22	£0.15	£9.50	£0.05	£0.00	**£10.07**
Peacehaven (South Coast Road)	£0.29	£0.08	£0.00	£0.02	£0.45	£0.48	£4.97	£0.85	£0.00	**£7.14**
Ringmer	£0.00	£0.00	£0.00	£2.01	£0.00	£0.04	£0.00	£0.00	£0.00	**£2.06**
Newick	£0.00	£0.00	£1.97	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£1.97**
Ditchling	£0.00	£0.22	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	**£1.01**
Kingston near Lewes	£0.48	£0.07	£0.00	£0.11	£0.07	£0.06	£0.07	£0.00	£0.00	**£0.86**
Outside Lewes District										
Brighton	£22.47	£4.58	£3.96	£7.40	£10.86	£13.02	£31.39	£21.90	£15.38	**£130.95**
Brighton Retail Parks/Large Foodstores	£1.50	£0.85	£0.95	£0.30	£0.48	£1.43	£5.29	£2.08	£0.80	**£13.69**
Eastbourne	£5.50	£0.53	£0.44	£3.94	£35.08	£8.81	£8.25	£1.95	£0.39	**£64.88**
Eastbourne Retail Parks/Large Foodstores	£0.65	£0.44	£0.09	£1.21	£7.87	£4.25	£0.60	£0.08	£0.24	**£15.42**
Haywards Heath	£0.27	£1.41	£4.84	£0.13	£0.00	£0.00	£0.00	£0.00	£6.49	**£13.14**
Tunbridge Wells	£0.55	£0.21	£2.16	£0.37	£0.51	£0.02	£0.13	£0.25	£0.23	**£4.43**
Tunbridge Wells, Retail Warehousing	£0.13	£0.00	£0.12	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	**£0.28**
Shoreham-by-Sea	£0.00	£0.12	£0.19	£0.39	£0.27	£0.00	£0.82	£0.83	£1.02	**£3.64**
Central London	£1.04	£0.12	£0.00	£0.73	£0.79	£0.00	£0.88	£1.80	£1.08	**£6.44**
Croydon	£0.46	£0.09	£0.27	£0.13	£0.18	£0.12	£0.47	£0.26	£0.37	**£2.36**
Crawley	£0.27	£0.46	£2.55	£0.14	£0.14	£0.00	£0.50	£0.16	£2.85	**£7.07**
Burgess Hill	£0.65	£2.78	£2.98	£0.00	£0.00	£0.10	£0.00	£0.32	£15.03	**£21.86**
Uckfield	£0.79	£0.00	£3.29	£1.10	£0.26	£0.00	£0.08	£0.00	£0.00	**£5.53**
Hove	£0.54	£0.13	£0.09	£0.28	£0.39	£0.15	£3.58	£1.39	£1.59	**£8.15**
Bluewater	£0.06	£0.00	£0.46	£0.15	£0.21	£0.00	£0.12	£0.32	£0.47	**£1.79**
Horsham	£0.00	£0.00	£0.12	£0.00	£0.11	£0.28	£0.06	£0.00	£0.00	**£0.58**
Horsham, Broadbridge Heath Retail Park	£0.13	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	**£0.25**
Worthing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£0.16	£0.00	**£0.29**
Hailsham	£0.08	£0.20	£0.00	£1.10	£0.15	£0.06	£0.13	£0.00	£0.00	**£1.71**
Heathfield	£0.13	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£0.00	£0.24	**£0.47**
Sevenoaks	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	**£0.10**
Hassocks	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.23	**£3.30**
Saltdean	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£3.68	£0.12	**£3.91**
Sevenoaks, Retail Warehousing	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	**£0.05**
Bexhill	£0.00	£0.00	£0.00	£0.06	£0.07	£0.00	£0.08	£0.00	£0.00	**£0.21**
Other	£0.58	£0.33	£1.87	£0.93	£0.96	£0.96	£0.82	£0.98	£1.22	**£8.65**
* Internet	£7.67	£3.31	£7.60	£4.81	£13.51	£7.36	£12.34	£5.70	£7.65	**£69.96**
* Catalogue/Mail Order	£5.98	£0.43	£0.74	£2.40	£3.47	£1.18	£2.69	£1.54	£1.48	**£19.92**

Notes: Based upon market shares from the household survey
Market share percentages (Table N) applied to comparison goods expenditure available in study area on a zone by zone basis (Table L).

TABLE P: Comparison Goods Shopping - Market Share Turnovers 2012 to 2030

	2012	2016	2021	2026	2030
	£m	£m	£m	£m	£m
Lewes	£46.15	£51.58	£59.14	£68.00	£76.04
Lewes, Tesco	£1.11	£1.24	£1.42	£1.64	£1.83
Lewes, Brooks Road Retail Park	£2.29	£2.56	£2.94	£3.38	£3.78
Seaford	£27.87	£31.15	£35.72	£41.07	£45.93
Newhaven	£18.89	£21.11	£24.21	£27.84	£31.13
Newhaven, The Drove Retail Park	£10.41	£11.63	£13.34	£15.34	£17.15
Peacehaven (Meridian Centre)	£6.11	£6.83	£7.83	£9.01	£10.07
Peacehaven (South Coast Road)	£4.33	£4.84	£5.55	£6.39	£7.14
Ringmer	£1.25	£1.39	£1.60	£1.84	£2.06
Newick	£1.20	£1.34	£1.53	£1.76	£1.97
Ditchling	£0.62	£0.69	£0.79	£0.91	£1.01
Kingston near Lewes	£0.52	£0.59	£0.67	£0.77	£0.86

Notes: Market share turnovers extracted from Table O.1 to O.5

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE Q: Comparison Goods Shopping Benchmark Turnover Estimates

	Sales Floorspace	Sales Density	Benchmark Turnover
	sqm	£/sqm	£m
Lewes	12,265	£4,500	£55.19
Lewes, Tesco	210	£8,350	£1.75
Lewes, Brooks Road Retail Park	2,500	£1,200	£3.00
Seaford	5,270	£4,000	£21.08
Newhaven	3,030	£3,500	£10.61
Newhaven, The Drove Retail Park	4,300	£2,500	£10.75
Peacehaven (Meridian Centre)	1,100	£3,500	£3.85
Peacehaven (South Coast Road)	1,250	£3,500	£4.38
Ringmer	250	£3,000	£0.75
Newick	250	£3,000	£0.75
Ditchling	160	£3,000	£0.48
Kingston near Lewes	150	£3,000	£0.45

Notes: Sales Floorspaces derived from Lewes DC, GLH Surveys and Goad
Sales Density is based upon analysis of the trading performance of a number of national multiple comparison goods retailers with experience based judgments applied to reflect the type and mix of retailers present.
Benchmark turnover is the product of sales floorspace and sales density.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

TABLE R: Comparison Goods Shopping - Capacity 2012 to 2031

	2012			2016			2021			2026			2030		
	Market Share Turnover	**Benchmark Turnover**	**Capacity**	**Market Share Turnover**	**Benchmark Turnover**	**Capacity**	**Market Share Turnover**	**Benchmark Turnover**	**Capacity**	**Market Share Turnover**	**Benchmark Turnover**	**Capacity**	**Market Share Turnover**	**Benchmark Turnover**	**Capacity**
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Lewes	£46.15	£46.91	**-£0.76**	£51.58	£49.79	**£1.79**	£59.14	£53.64	**£5.50**	£68.00	£57.79	**£10.22**	£76.04	£62.25	**£13.79**
Lewes, Tesco	£1.11	£1.75	**-£0.64**	£1.24	£1.86	**-£0.62**	£1.42	£2.00	**-£0.58**	£1.64	£2.16	**-£0.52**	£1.83	£2.33	**-£0.49**
Lewes, Brooks Road Retail Park	£2.29	£3.00	**-£0.71**	£2.56	£3.18	**-£0.62**	£2.94	£3.43	**-£0.49**	£3.38	£3.70	**-£0.32**	£3.78	£3.98	**-£0.20**
Seaford	£27.87	£21.08	**£6.79**	£31.15	£22.37	**£8.78**	£35.72	£24.10	**£11.62**	£41.07	£25.97	**£15.11**	£45.93	£27.97	**£17.96**
Newhaven	£18.89	£10.61	**£8.29**	£21.11	£11.26	**£9.86**	£24.21	£12.13	**£12.08**	£27.84	£13.06	**£14.77**	£31.13	£14.07	**£17.06**
Newhaven, The Drove Retail Park	£10.41	£10.75	**-£0.34**	£11.63	£11.41	**£0.22**	£13.34	£12.29	**£1.05**	£15.34	£13.24	**£2.10**	£17.15	£14.26	**£2.89**
Peacehaven (Meridian Centre)	£6.11	£3.85	**£2.26**	£6.83	£4.09	**£2.74**	£7.83	£4.40	**£3.43**	£9.01	£4.74	**£4.26**	£10.07	£5.11	**£4.96**
Peacehaven (South Coast Road)	£4.33	£4.38	**-£0.04**	£4.84	£4.64	**£0.20**	£5.55	£5.00	**£0.55**	£6.39	£5.39	**£1.00**	£7.14	£5.81	**£1.34**
Ringmer	£1.25	£0.75	**£0.50**	£1.39	£0.80	**£0.60**	£1.60	£0.86	**£0.74**	£1.84	£0.92	**£0.91**	£2.06	£1.00	**£1.06**
Newick	£1.20	£0.75	**£0.45**	£1.34	£0.80	**£0.54**	£1.53	£0.86	**£0.67**	£1.76	£0.92	**£0.84**	£1.97	£1.00	**£0.97**
Ditchling	£0.62	£0.48	**£0.14**	£0.69	£0.51	**£0.18**	£0.79	£0.55	**£0.24**	£0.91	£0.59	**£0.32**	£1.01	£0.64	**£0.38**
Kingston near Lewes	£0.52	£0.45	**£0.07**	£0.59	£0.48	**£0.11**	£0.67	£0.51	**£0.16**	£0.77	£0.55	**£0.22**	£0.86	£0.60	**£0.27**

Notes: Market share turnovers extracted from Table O.1 to O.5;
Benchmark turnover from Table Q with allowance for trading efficency growth of 1.5% per annum. In the case of Lewes Town Centre we have made a reduction of 15% in benchmark turnover to reflect the non-resident tourist/visitor based spending in the town centre.
Capacity is the product of market share turnover minus benchmark turnover.

LEWES DISTRICT SHOPPING STUDY RETAIL CAPACITY ANALYSIS TABLES

Table S: **Comparison Goods Shopping Commitments (at 2012)**

Store/Location	Comparison Goods Floorspace sqm	Comparison Goods Benchmark Turnover £/sqm	Comparison Goods Turnover £m
Tesco, Lewes	930	£8,350	£7.766
Sainsbury, Newhaven	1740	£7,005	£12.189

Notes: Information supplied by Lewes DC
Turnovers based upon latest published trading densities for the retailers

APPENDIX 6

LEWES SHOPPING STUDY RETAIL SERVICE TRADES ANALYSIS

Existing Proportions of Retail Services in Lewes Districts Main Centres		
Centre	Floorspace %	Units %
Lewes	31%	38%
Seaford	41%	48%
Newhaven	30%	44%
Peacehaven Meridian	10%	47%
Peacehaven South Coast	52%	60%

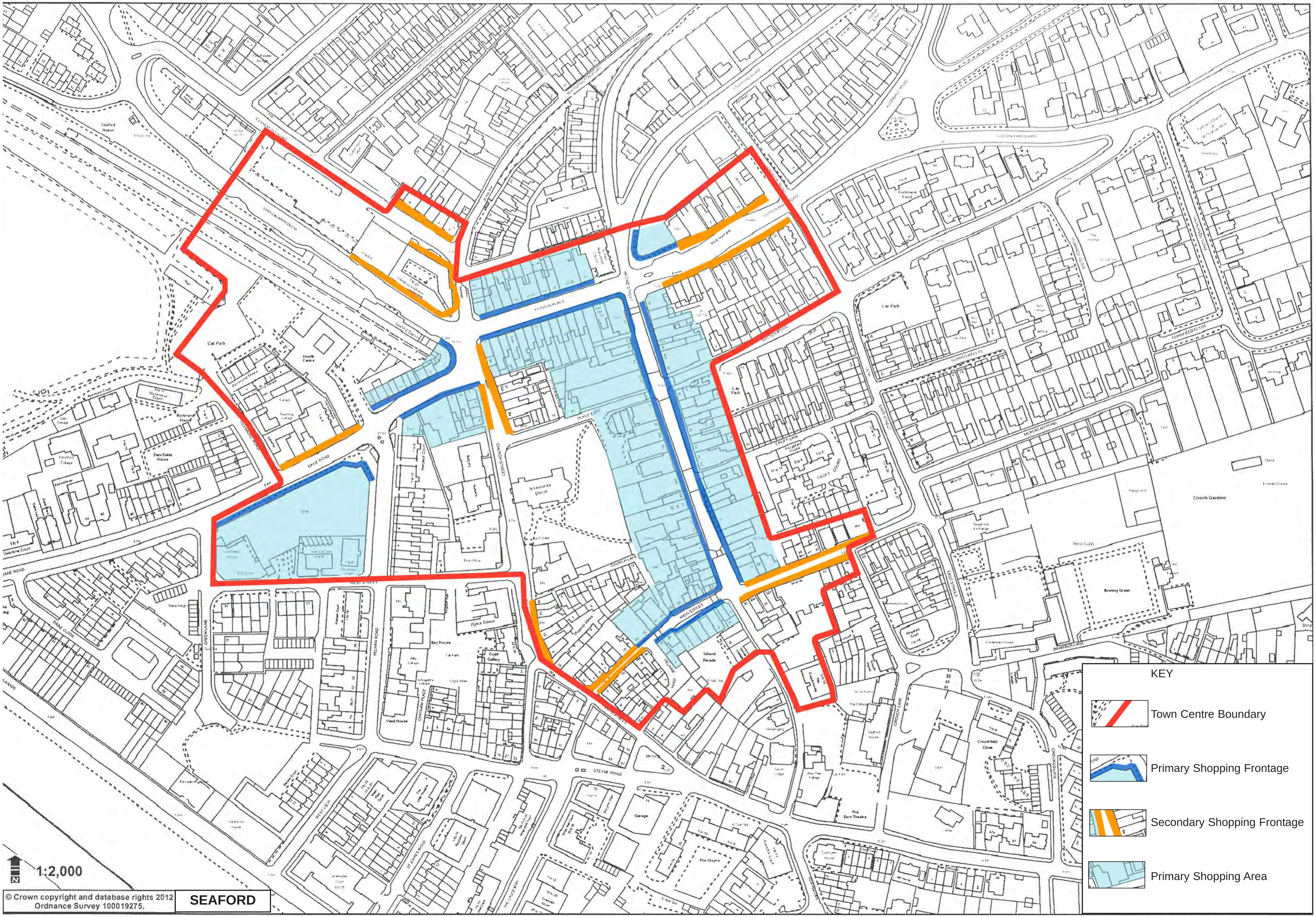
TABLE 7.3: LEWES COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	Nil	Nil	16	223	393
Comparison Goods Floorspace Need	sqm (gross)	Nil	Nil	271	2,165	3,586
Total Retail	sqm (gross)	Nil	Nil	286	2,388	3,979
Proportion of Retail Service Trades (Existing)		31%	31%	31%	31%	31%
Total Floorspace Need	sqm (gross)	Nil	Nil	375	3,129	5,212

TABLE 7.6: NEWHAVEN COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	755	888	1,043	1,222	1,368
Comparison Goods Floorspace Need	sqm (gross)	377	1,194	2,359	3,790	4,965
Total Retail	sqm (gross)	1,133	2,081	3,402	5,012	6,333
Proportion of Retail Service Trades (Existing)		30%	30%	30%	30%	30%
Total Floorspace Need	sqm (gross)	1,472	2,706	4,423	6,516	8,233

TABLE 7.9: SEAFORD COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	886	995	1,122	1,268	1,388
Comparison Goods Floorspace Need	sqm (gross)	2,599	3,358	4,443	5,778	6,868
Total Retail		3,485	4,352	5,565	7,047	8,256
Proportion of Retail Service Trades (Existing)	sqm (gross)	41%	41%	41%	41%	41%
Total Floorspace Need	sqm (gross)	4,914	6,137	7,846	9,936	11,641

TABLE 7.12: PEACEHAVEN COMBINED RETAIL AND RETAIL SERVICE FLOORSPACE NEED						
		2012	2016	2021	2026	2030
Convenience Goods Floorspace Need	sqm (gross)	Nil	Nil	56	124	180
Comparison Goods Floorspace Need	sqm (gross)	849	1,126	1,522	2,012	2,408
Total Retail	sqm (gross)	849	1,126	1,578	2,136	2,588
Proportion of Retail Service Trades (Existing)		31%	31%	31%	31%	31%
Total Floorspace Need	sqm (gross)	1,113	1,475	2,068	2,798	3,390

APPENDIX 7


KEY
Town Centre Boundary
Primary Shopping Frontage
Secondary Shopping Frontage
Primary Shopping Area
1:2,000
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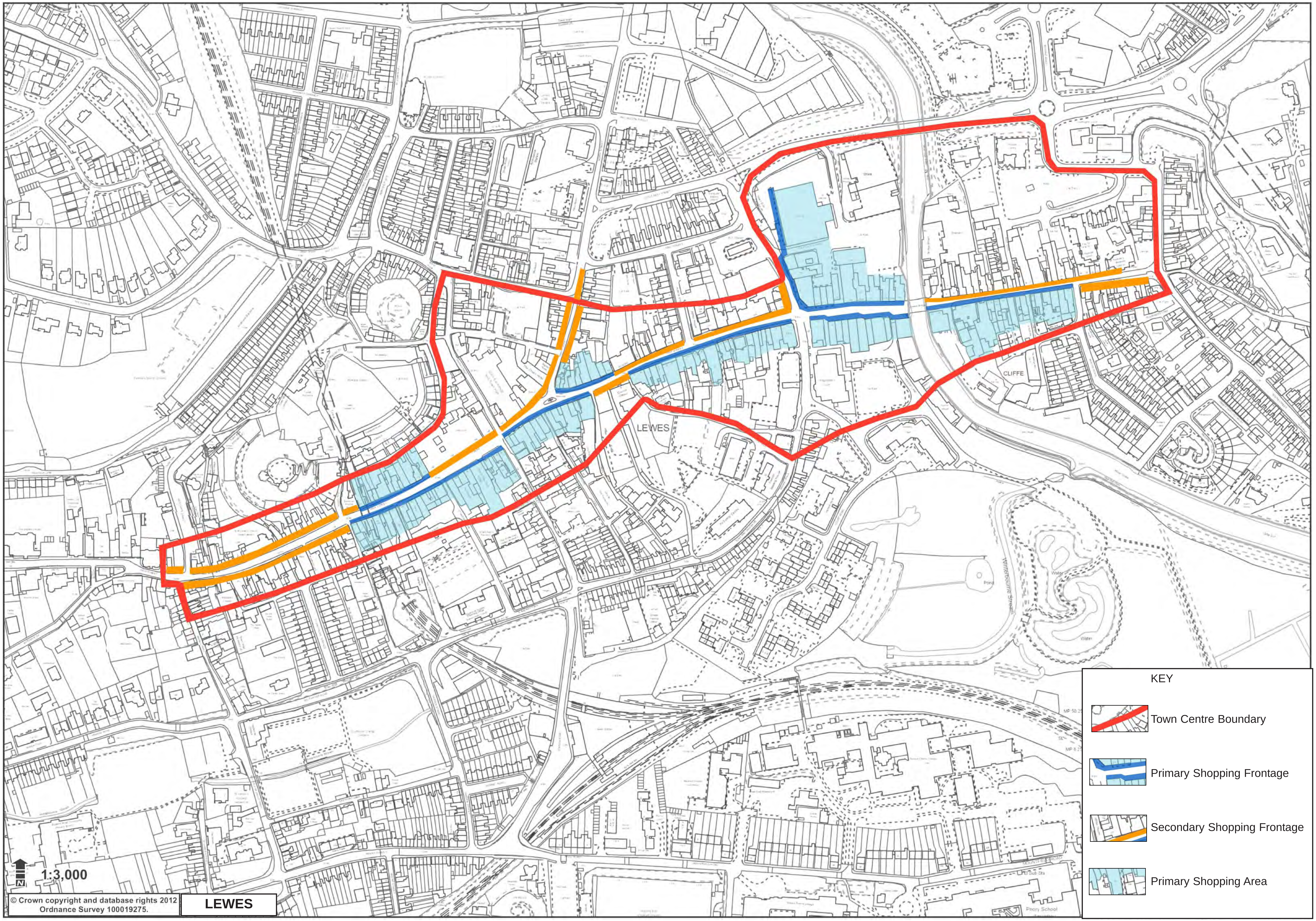
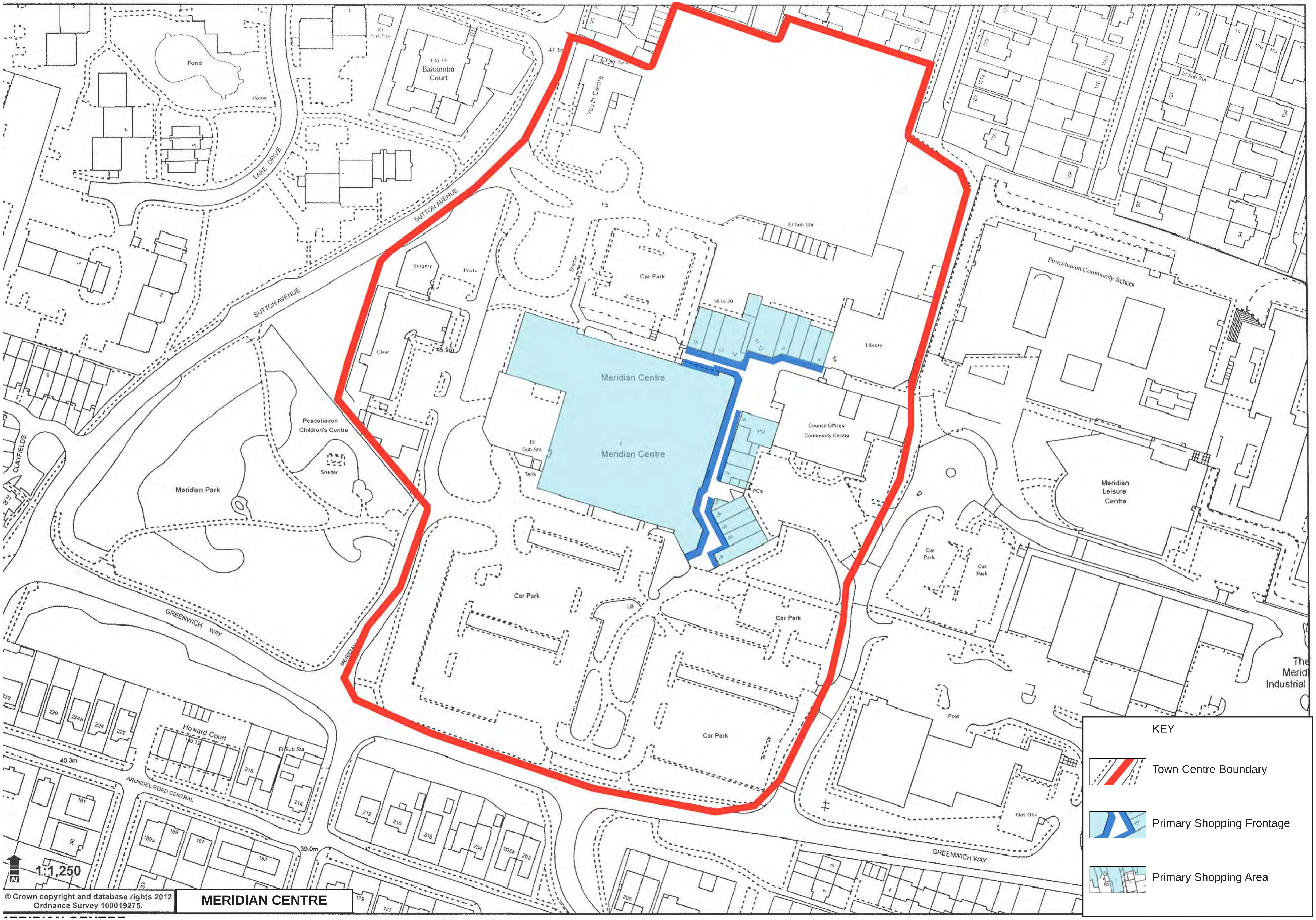
SEAFORD

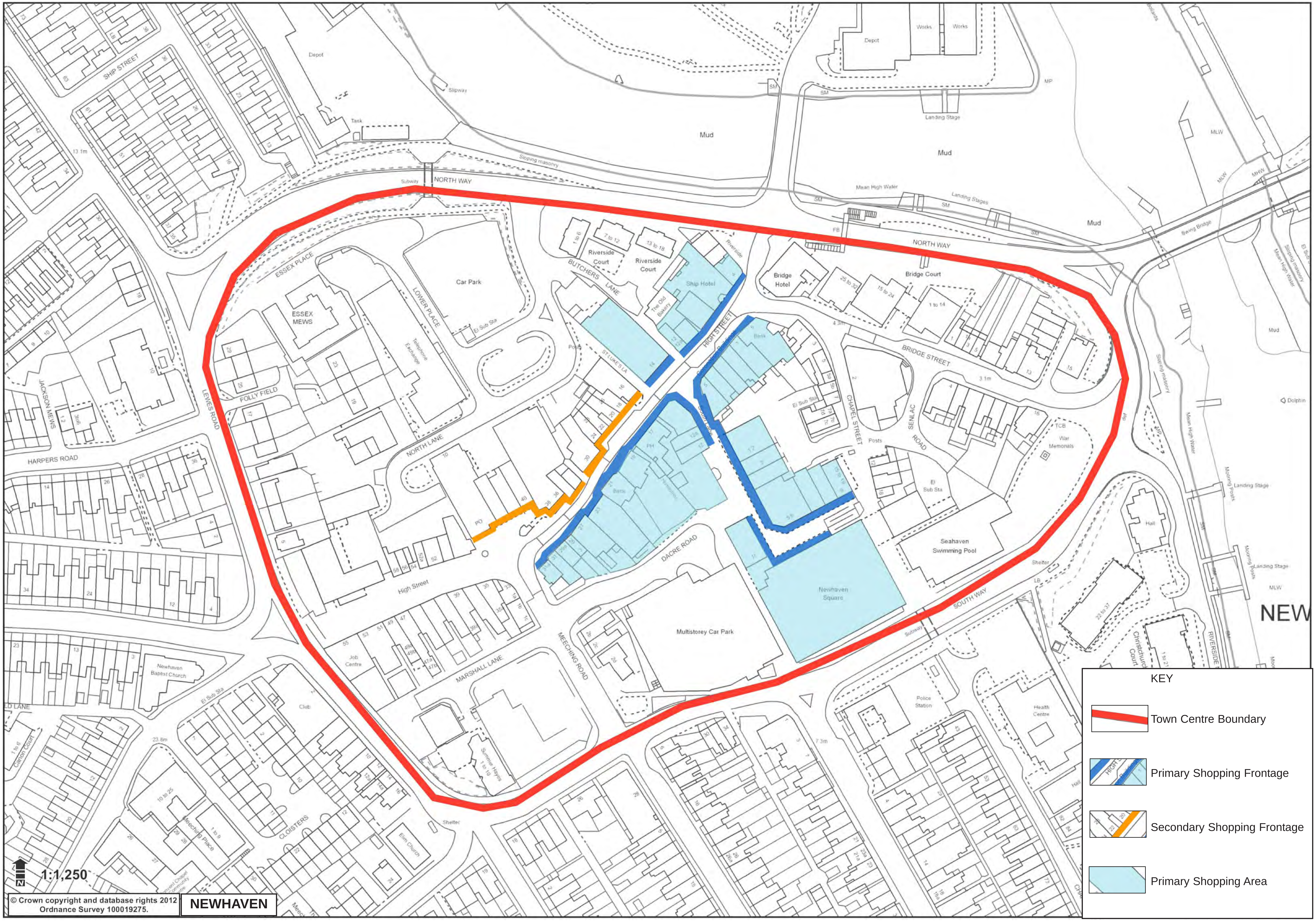


LEWES
CLIFFE
KEY
Town Centre Boundary
Primary Shopping Frontage
Secondary Shopping Frontage
Primary Shopping Area
1:3,000
N

LEWES



MERIDIAN CENTRE



NORTH WAY
Mud
ESSEX PLACE
ESSEX MEWS
LOWER PLACE
Telephone Exchange
Car Park
Riverside Court
BUTCHERS LANE
Ship Hotel
HIGH STREET
Bridge Hotel
Bridge Court
BRIDGE STREET
CHAPEL STREET
SENLAC ROAD
War Memorials
FOLLY FIELD
NORTH LANE
LEWES ROAD
JACKSON MEWS
HARPERS ROAD
SHIP STREET
High Street
DACRE ROAD
Seahaven Swimming Pool
Newhaven Square
Multistorey Car Park
SOUTH WAY
MEECHING ROAD
MARSHALL LANE
Job Centre
Newhaven Baptist Church
CLOISTERS
Police Station
Health Centre
Christchurch Court
RIVERSIDE
Meeching Place
Sloping masonry
Mean High Water
Landing Stage
Swing Bridge
Depot
Works
Slipway
Subway
NEW
KEY
Town Centre Boundary
Primary Shopping Frontage
Secondary Shopping Frontage
Primary Shopping Area
1:1,250

NEWHAVEN