Mid Sussex District Council

Retail Study Update – November 2014

QA

Mid Sussex District Council: Retail Study Update 2014

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Date	Originators	Approved
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1.0 INTRODUCTION

1.1 Strategic Perspectives ('SP') was commissioned by the Mid Sussex District Council in July 2014 to update the retail evidence base (i.e. the *2008 Retail Study* and the *November 2009 Update*) to help inform both plan-making and decision-taking across the District.

1.2 Mid Sussex is a rural District in the South East of England. It has three main towns – Burgess Hill, East Grinstead and Haywards Heath – and a good mix of larger and smaller villages and hamlets. According to the latest Census there were some 140,000 people living in the District in 2011, of which 62% were resident in the three main towns. The District is one of the least deprived areas in the country according to the 2010 *Index of Multiple Deprivation* (IMD) and has relatively low unemployment and crime levels, and a high standard of living. The District's local economy benefits from the fact that it is close to Crawley and London Gatwick Airport, and is within commuting distance of London, Brighton and the south coast. The area is also part of the *Gatwick Diamond Initiative* (an economic area centred upon the airport and covering nine local authority areas) and the larger '*Coast to Capital' Local Enterprise Partnership* (LEP), which stretches from Chichester in the west to Brighton in the south and up to Croydon in the north. Mid Sussex also benefits from its countryside setting and rich heritage, which attracts many visitors and tourists to the area.

1.3 Notwithstanding its attraction as a place to live, work, shop and visit for a range of activities, Mid Sussex faces a number of challenges that need to be addressed if it is to ensure its sustainable growth and development in the future. These issues include the relatively high levels of in and out commuting, which impacts on traffic levels and the District's environmental quality, as well as rising house prices and the need to provide new and more affordable homes. Mid Sussex District Council also recognises that an important element of achieving sustainable communities will involve the regeneration and renewal of its three main town centres to help strengthen their important roles and functions as attractive and thriving retail, leisure and commercial centres each with their own distinctive character.

1.4 It is against this background that this retail and town centres assessment has been prepared. In terms of the scope of work, the Council's Brief set out the following five main requirements:

i. A refresh of the household telephone survey to identify market shares for convenience and comparison shopping habits in the District, and how these may have changed over time.

ii. An assessment of the potential residual retail expenditure and floorspace capacity available for new retailing up to 2031, broken down into five year periods.

iii. A high level update of the health checks of the main centres in the District (namely Burgess Hill, East Grinstead and Haywards Heath) and the two larger villages of Hassocks and Hurstpierpoint.

iv. Advice on the strengths and weaknesses of each centre and their capacity to accommodate additional retail growth.

v. Advice on the level and type of retail development which would be appropriate for Mid Sussex District over the development plan period, taking into account national and local economic trends.

1.5 The study will provide the necessary robust and up-to-date retail information and evidence needed by Mid Sussex District Council to inform both plan-making and decision-taking at the local level over the development plan period. It has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the *National Planning Policy Framework* (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014, which still places significant weight on the development of positive plan-led visions and strategies for town centres, and retains the key sequential and 'impact tests'.

1.6 The assessment of the need for new (convenience and comparison goods) retail floorspace has been carried out at the strategic 'District-wide' level. Capacity has also been assessed for the District's main centres and the village centres of Hassocks and Hurstpierpoint to help inform the scale, type, location and phasing of new retail development over the short (0-5 years), medium (6-10 years) and long term (11+ years).

1.7 The study area defined for the purpose of this retail assessment principally covers Mid Sussex District and a wider area incorporating neighbouring local planning authorities. This area has been further sub-divided into ten zones that broadly reflect the prime catchments of the Borough's main centres (see **Appendix 1**). The defined study area and zones provide the framework for the new telephone interview survey of some 1,000 households conducted by *NEMS Market Research* (NEMS) in July/August 2014. This survey provides the most up-to-date evidence on shopping patterns, leisure preferences and expenditure flows within the study area. In turn, this has informed the high level health check assessments for the main centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace. The survey approach adopted by NEMS is explained in some detail in **Appendix 2**, along with the questionnaire. The full (weighted) survey results are set out in **Appendix 3**.

1.8 For ease of reference this report is structured as follows:

- **Section 2** reviews the national, regional and local planning policy context material to retail planning and town centres.

- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4** sets out the results of the market share analysis for convenience and comparison goods retailing across the study area and ten zones as derived from the results of the household telephone interview survey. The market share tabulations for convenience and comparison goods are set out in **Appendix 4** and **Appendix 5** respectively.
- **Sections 5-8** provide high-level updates of the town centre health checks for the District's main towns (i.e. Burgess Hill, East Grinstead and Haywards Heath) and the main village centres (i.e. Hassocks and Hurstpierpoint). These assessments draw on recent research, including the latest Experian Goad Reports for Burgess Hill, East Grinstead and Haywards Heath (**Appendix 6**), supplemented by site visits. Drawing on the health checks conducted for the *2008 Mid Sussex Retail Study* (2008 MSRS) it has also been possible to identify some of the changes in each centre's key performance indicators (KPIs) over the last 6-7 years.
- **Section 9** describes the key inputs and outputs of the retail (economic) capacity assessment for comparison and convenience goods retailing for the District and its main centres. SP's CREATe Models are set out in **Appendix 7** for convenience goods and **Appendix 8** for comparison goods.
- Finally, **Section 10** draws together the key findings of the qualitative and quantitative need assessments. Where a need for new retail (convenience and comparison goods) is identified over the development plan period, the study will provide high level advice on where this need should be directed in accordance with the main aims of national and local plan policy. Advice is also provided on the need to review the definitions of existing town centre boundaries and primary shopping areas in light of the findings of the need assessment, and whether an local impact threshold should be set in accordance with the NPPF (para 26).

1.9 It should be noted at the outset that the scope of the retail study update agreed with the local planning authority does not extend to include commercial leisure uses (Class D2), as defined by the NPPF (ie. cinemas, night clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls), or other main town centre uses (eg. Offices, theatres, galleries, hotels etc.). Notwithstanding this, the household telephone interview survey commissioned for the purpose of this study did ask specific questions on leisure preferences and behaviour, and will therefore provide part of the robust evidence base required to inform future leisure needs assessments. In addition, the town centre health checks carried out to inform this retail study update also takes account of wider leisure and town centre uses in addition to each centres main retail offer. Nevertheless, we advise Mid Sussex District Council that it should update its leisure needs assessment as a priority.

1.10 Finally, it is important to state at the outset that, in our experience, capacity forecasts beyond a five year time period should be interpreted with caution as they are subject to increasing margins of error. We therefore advise the Council that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be constantly monitored and updated to take into account any significant new retail development and changes in the retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail sector (such as, for example, the growth in internet shopping).

2.0 PLANNING POLICY CONTEXT

2.1 This section briefly reviews the relevant national and local development plan planning policy pertaining to retail and town centre uses.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans[1] and Neighbourhood Plans[2].

2.3 At the heart of the NPPF is a **presumption in favour of sustainable development**[3], which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level. For plan-making the Framework states 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. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *"…it is clear that development which is sustainable can be approved without delay*".

2.4 The NPPF (paragraph 17) also sets out twelve **core planning principles** that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should, *inter alia*:

- be genuinely plan-led;
- proactively drive and support sustainable economic development to deliver thriving local places;
- promote mixed use developments;
- focus significant development in locations which are or can be made sustainable; and
- deliver sufficient community and cultural facilities and services to meet local needs.

[1] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[2] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[3] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

2.5 The Framework (paragraph 150) emphasises that **Local Plans** are *"…the key to delivering sustainable development that reflects the vision and aspirations of local communities"*. They should be *"aspirational but realistic"* and should set out the opportunities for development and clear policies on *"…what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

2.6 The NPPF (paragraph 156) requires **strategic priorities** for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.7 In terms of the **evidence-based approach to planning**, the Framework states LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to:

- assess the needs for land or floorspace for economic development, including for retail and leisure development;
- examine the role and function of town centres and the relationship between them;
- assess the capacity of existing centres to accommodate new town centre development; and
- identify locations of deprivation which may benefit from planned remedial action.

2.8 The NPPF is clear that pursuing sustainable development requires *"…careful attention to viability and costs in plan-making and decision-taking"* (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified in the plan should *"…not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened"* (paragraph 173).

2.9 The Framework (paragraphs 18-149) sets out thirteen key 'principles' for **delivering sustainable development**, including:

- building a strong, competitive economy;
- ensuring the vitality of town centres;
- promoting sustainable transport;
- delivering a wide choice of high quality homes;
- requiring good design; promoting healthy communities;
- protecting Green Belt land; and
- conserving and enhancing the natural and historic environment.

2.10 In terms of **ensuring the vitality of town centres** the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[4] environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas[5], based on a clear definition of primary and secondary frontages[6] in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

[4] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[5] Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

[6] The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;

- ensure that the needs for retail, leisure, office and other main town centre uses are *"met in full"* and *"not compromised by limited site availability"*. Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;

- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.11 When assessing and determining applications for main town centre uses[7] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a **sequential test**[8], which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, *"…preference should be given to accessible sites that are well connected to the town centre"* (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.

- Require an **impact assessment** if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m^2). The NPPF (paragraph 26) states that this 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; and on town centre vitality and viability, including local

[7] NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

[8] This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

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"*.

2.12 The NPPF (paragraph 27) states that *"…where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused"*.

2.13 As previously stated in Section 1, this study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014. The NPPG has streamlined and replaced the advice previously set out in PPS4 *Practice Guidance on Need, Impact and the Sequential Approach*. The revised NPPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the NPPG (para 003) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a "*three-five year period*" but should "*also take the lifetime of the Local Plan into account and be regularly reviewed*".

LOCAL PLANNING POLICY CONTEXT

2.14 The Local Plan for Mid Sussex was adopted in 2004 and is in the process of being replaced by the *Mid Sussex District Plan 2014-2031*, which was published for consultation in November 2014.

2.15 The Council has also adopted Masterplans for East Grinstead (July 2006), Burgess Hill (November 2006) and Haywards Heath (June 2007) as *Supplementary Planning Documents* (SPDs) to help guide development in these centres. Subsequent to this, the *Visioning the Future* (2007) document for Burgess Hill sets out a vision for the centre's development over the next 30 years, and the *Burgess Hill Town Wide Strategy* (2011) was produced by the Town Council to inform the preparation of the emerging Local Plan. Neighbourhood Plans are also being prepared for each of the main centres in Mid Sussex:

- The Burgess Hill Neighbourhood Plan (currently at consultation stage).
- The East Grinstead Neighbourhood Plan (currently at draft stage).
- The Haywards Heath Neighbourhood Plan (currently at draft stage).
- The Hassocks Neighbourhood Plan (currently at draft stage).
- The Hurstpierpoint Neighbourhood Plan (currently at submission stage).

2.16 The following provides a brief summary of some of the main provisions and policies of the adopted and emerging development plans of particular relevance to retail planning and the management and growth of the District's main centres. Please note that the main aims of the Town Centre Masterplans and Neighbourhood Plans are described as part of the updated health check assessments (see Sections 5-8) and are therefore not repeated here.

Mid Sussex District Local Plan (2004)

2.17 The adopted 2004 Local Plan remains the core planning policy document for the District and covers the period up to 2006. Although the majority of policies, including all those related to retailing, were 'saved' in 2007, they will eventually be replaced by new development plan documents. In the meantime, due weight should be given to relevant policies in the adopted plan according to their degree of consistency with the NPPF (in other words, the closer the policies in the plan to the policies in the NPPF, the greater the weight that may be given).

2.18 As part of the sustainable approach to development the plan sets out the Council's policies to help promote and strengthen its three main town centres - Burgess Hill, East Grinstead and Haywards Heath – and the smaller centres (including Hassocks and Hurstpierpoint). The main saved policies include:

- **Policy S1** states that proposals for new or enhanced shopping facilities in the town centres (as defined on the Proposals Map) will be permitted where they help to sustain and enhance their vitality and viability. Land is also allocated for the redevelopment and extension of the main shopping centres in each town centre (i.e. The Martlets in Burgess Hill, Queens Walk in East Grinstead and The Orchards in Haywards Heath);
- **Policy S2** allows for the development of new retail space over 500m^2 gross subject to adequate provision for a range of factors, including access by different modes of travel, servicing, landscaping, etc.;
- **Policies S3** and **S4** seek to maintain the retail function of Primary and Secondary Shopping Frontages in the main town centres (as defined on the Proposals Map), but do allow for change of use to Class A2 (financial and professional services) or Class A3 (food and beverage uses) subject to the satisfaction of various criteria, including the need to sustain and enhance the vitality and viability of the shopping area.
- **Policies S6** and **S7** seek to maintain and enhance the important role and function of the various village centres that meet the day-to-day needs of local residents, and resist, where possible, the loss of convenience shopping facilities in the interests of maintaining locally accessible and viable facilities. However, in exceptional circumstances, where the retail use is shown to be no longer viable, a change of use will be permitted subject to the satisfaction of three criteria.
- Finally, **Policies S8** and **S9** deal with the assessment of proposals for new or enhanced shopping facilities on edge and out of centre sites. However these policies have since been superseded by paragraphs 24-27 of the NPPF.

Draft Mid Sussex District Plan (2014-2031)

2.19 Mid Sussex Council formally withdrew their draft District Plan on 27th May 2014, following advice from the Inspector that it had not met the Duty to Cooperate. A new draft of the District Plan is currently underway, with a target date for submission set for July 2015 and adoption timetabled for March 2016.

2.20 In accordance with the NPPF (Annex 1), decision makers can give weight to relevant policies in emerging plans according to: the stage of preparation of the emerging plan; the extent to which there are unresolved objections to relevant policies; and the degree of consistency of the relevant policies in the emerging plan to the policies in the NPPF.

2.21 The *Consultation Draft District Plan 2014-2031* sets out the Council's vision, objectives and policies to guide development for the period up to 2031. The vision for the District focuses on four themes:

- Protecting and enhancing the environment;
- Promoting economic vitality;
- Ensuring cohesive and safe communities; and
- Supporting healthy lifestyles.

2.22 In brief the District Plan seeks to achieve sustainable development and economic growth in accordance with paragraph 10 of the NPPF. In this context **Policy DP1** seeks to promote economic, social and environmental benefits through development based on the aims of the *Mid Sussex Partnership's Sustainable Communities Strategy* (2008-2018). **Policy DP2** also encourages new business to locate in the District to help meet the 7,600 new jobs required over the plan period to meet the identified level of economic growth. The aim is to encourage residents of Mid Sussex to work locally and thereby reduce the need to commute, as well as contributing towards the prosperity of the *Gatwick Diamond* and *Greater Brighton City Region*.

2.23 **Policy DP3** provides the policy framework for new retail and town centre development in the District. It supports the regeneration and renewal of the District's three main town centres and the surrounding large and small villages, and states that sustainable development (including mixed use and tourism-related development) will be permitted in town centres provided it is appropriate in scale and function to its location, including the character and amenities of the surrounding area; and is in accordance with the Town Centre Masterplans or updated documents and/or any relevant Neighbourhood Plan.

2.24 The Policy was informed by the *2008 Mid Sussex Retail Study* (2008 MSRS) which advised that for:

- **Convenience goods** - there was no District-wide capacity for new floorspace until 2024. Up to 2031, the lifetime of the local plan, there was capacity for some 3,232m^2 of new floorspace, of which the majority should be directed towards Burgess Hill and East Grinstead.

- **Comparison goods** – there was forecast capacity for 10,487m^2 of new retail floorspace by 2031. This was fairly evenly distributed between the three main town centres of Haywards Heath (2,659m^2), Burgess Hill (3,985m^2) and East Grinstead (3,447m^2), with more limited capacity in the village centres (395m^2).

2.25 No specific targets for new retail floorspace are set out in Policy DP3, as there were proposals for redevelopment schemes in the three main town centres that would effectively accommodate all the forecast quantitative need by 2031.

2.26 Policy DP3 also states that the local planning authority will require sequential and impact tests for retail, leisure, office and other main town centre uses proposed outside of centres and not in accordance with the District Plan or Neighbourhood Plan. This has been prepared in compliance with the NPPF (paragraphs 24-27), although we note that no local impact threshold has been set by the local planning authority in the Consultation Draft.

2.27 With regard to Primary and Secondary Shopping frontages, Policy DP3 also promotes uses and development that will enhance the vitality and viability of the area, provided that it does not threaten the predominance of A1 (and/or A1-A5) uses. The policy also states that changes of use to B1a offices or residential use at ground floor level will be resisted. However it should be noted that new Permitted Development Rights have been introduced under recent legislation by the Government which allow for changes of use for a number of different uses without the need for planning permission; although prior approval may be required. Of relevance to this study, units within use classes A1-A5, B1 and D1-D2 uses will be permitted to change use for a single period of up two years to A1-A3 and B1 uses. From April 2014, further legislation was brought in which extended permitted development rights to include the change of use from retail (A1 and A2 units up to 150m^2 in size) to residential uses and also retail (A1 units) to banks or building societies. The prior approval will require applicants to take account of the potential impact of the loss of shops on the health of the centre or shopping area.

2.28 The emerging District Plan also seeks to support a prosperous rural economy in accordance with paragraph 28 of the NPPF. The 2008 MSRS identified that the village centres of Hassocks and Hurstpierpoint were performing well in their roles, meeting the day-to-day needs of their local residents. **Policy DP4** specifically deals with these two centres and the other key village centres of Crawley Down, Cuckfield and Lindfield. It states that development in these centres will be permitted providing that it is appropriate in scale and function; helps to maintain and enhance the range of shops and services to enable the village centres to meet local needs; and is in accordance with the relevant Neighbourhood Plan. Policy DP4 also covers the need to maintain the important role and function of the other smaller village and neighbourhood centres in the District.

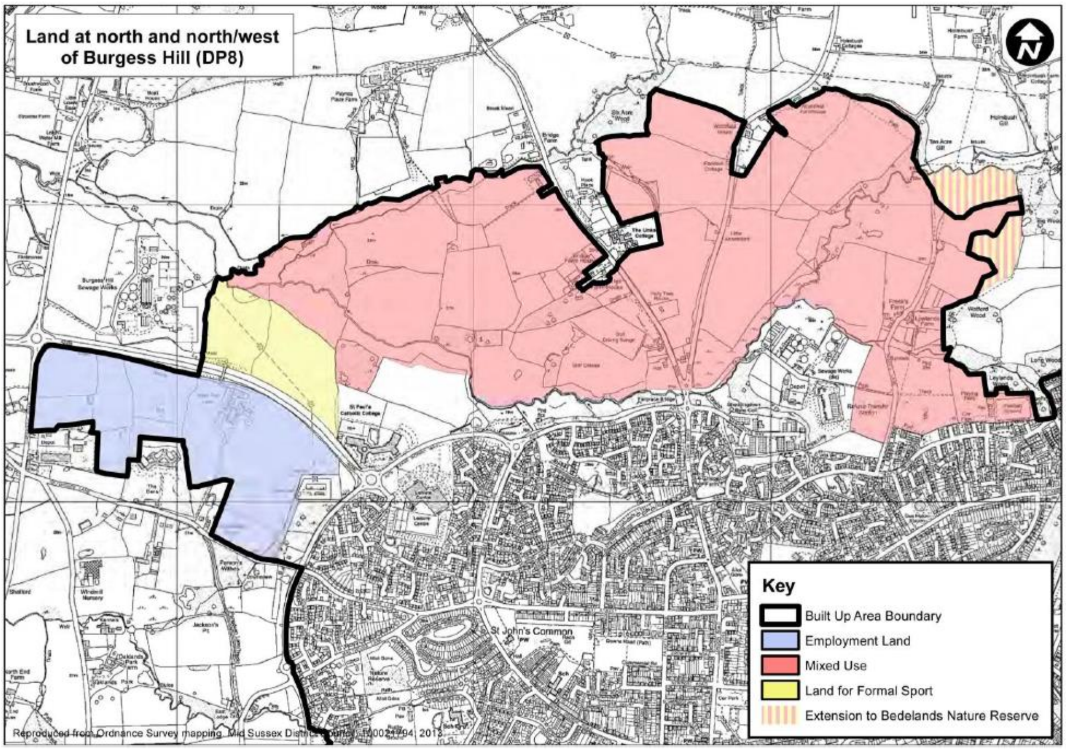
2.29 As stated previously, the main aim of this retail study update will be to review and update the quantitative and qualitative need assessments that informed Policies DP3 and DP3 based on current evidence and new research.

2.30 In brief the other main policies of relevance to this retail study update in the *Consultation Draft District Plan 2014-2031* include:

- **Policy DP5 -** will set out the Council's proposed housing provision figure. However, at this consultation stage the ongoing work to identify the housing land supply and an assessment of the unmet development needs of neighbouring authorities had not been completed.
- **Policy DP6** - sets out the principles for strategic development at Burgess Hill, building on the objectives set out in the *Burgess Hill Town Wide Strategy* (2011, see below), including:
    - A better, more accessible town centre with a greater range of shops, an expansion of retail floorspace, leisure uses and public realm improvements, including a new public square;
    - Improved public transport, walking, cycling links as well as better roads;
    - New and improved community, retail, cultural, educational, health, recreation, play and other facilities to help form strong local communities and encourage healthy lifestyles;
    - Additional high quality employment opportunities, including suitably located Business and Science Park developments;
    - A range of housing, including a minimum of 30% affordable housing; and
    - New, improved and well-connected sports, recreation and open space in and around Burgess Hill.
- **Policy DP7** - sets out the Strategic Allocation to the East of Burgess Hill at Kings Way for a mix of new homes, open space and community facilities. In May 2013 the Council granted permission for 480 new homes on this site, including a new neighbourhood centre.
- **Policy DP8 -** sets out the Strategic Allocation to the north and north-west of Burgess Hill, located between Bedelands Nature Reserve to the east and Goddards Green Waste Water Treatment works to the west of the town. This site forms an essential part of the strategic delivery of some 3,500 new homes, along with two neighbourhood centre areas (including retail), a high quality business park, two new primary schools and a secondary school campus and a

Centre for Community Sport. The area between Maple Drive and the land known as the *'Northern Arc'* is included within the allocation to ensure that new development is integrated with the existing town, and there are good public transport and pedestrian links between the development and Wivelsfield station. The Council requires a comprehensive approach to masterplanning and infrastructure delivery for the Allocation Area as a whole.

Figure 2.1 **Policy DP8 – Burgess Hill: Strategic Allocation**



- **Policy DP21** supports development that provides new and/or enhanced leisure and cultural activities and facilities, in accordance with the Council's adopted Leisure and Cultural Strategy and the NPPF (Section 8). The policy objective is to promote healthy and enjoyable lifestyles through the provision of appropriate facilities. Sites for appropriate facilities to meet local needs will be identified through *Neighbourhood Plans* or a *Site Allocations Development Plan Document* (SADPD) to be produced by the Council.
- Finally, **Policy DP22**, supports the provision or improvement of community facilities and local services that contribute to creating sustainable communities, to be identified through *Neighbourhood Plans* or a *SADPD.*

SUMMARY

2.31 In summary, the underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations *"first"* in accordance with the sequential approach. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping and competition from major out-of-centre developments (discussed further **in Section 3**).

3.0 NATIONAL RETAIL TRENDS & TOWN CENTRE FUTURES

3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

RETAIL TRENDS

Retail Expenditure Growth

3.2 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further.

3.3 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest *Retail Planner Briefing Note 12* (October 2014).

Table 3.1 **Growth in UK Retail Spend per Head (% change), 2008 - 2030**

Volume Growth per head (%):	----------ACTUAL GROWTH----------						FORECASTS		TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015-25	1973-2013	1993-2013
Total Retail Spend	**1.7**	**-3.1**	**0.3**	**-0.8**	**1.2**	**2.3**	**3.3**	**2.4**	**2.7**	**3.6**
Convenience Goods:	-4.9	-5.0	-0.8	-2.7	-0.5	-1.3	-0.5	0.6	**0.2**	**-0.2**
Comparison Goods:	4.7	-2.4	0.9	0.5	2.6	4.6	5.6	3.3	**4.5**	**5.9**

Source: Experian Retail Planner Briefing Note 12 (October 2014); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1973-2013 (the '*ultra long-term*' trend) and for 1993-2013 (the '*medium-term*' trend).

3.4 Although there has been negative annual growth in convenience goods expenditure per capita levels since 2008, the forecasts for 2015-25 show positive growth of +0.6% per annum on average. This is above previous historic long term trends of around +0.2% per annum.

3.5 For comparison goods Experian forecast that annual growth rates are recovering from a low of -2.4% in 2009, to +4.6% in 2013 and a stronger annual growth of +5.6% for 2014. Experian forecast that growth will average +3.3% per annum for the period 2015-2025, which is well below historic trends of between 4.5% and 5.9% per annum.

3.6 In summary there are positive signs of improvement in the UK economy and consumer and business confidence in 2014. Notwithstanding this, it is clear that the retail sector is highly vulnerable to changes in the UK economy (and how it responds in the future to changes in the Eurozone and global economies) and the fact that the forecast growth in retail sales volumes will be much lower and slower than in recent history.

Special Forms of Trading and Internet Shopping

3.7 Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

3.8 Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2014) value of internet sales is £37.2bn (current prices) and other (non-internet) SFT sales stand at approximately £8.3bn. This results in total SFT sales of £45.5bn in 2013, which represents a circa 165% increase from £17.1bn recorded in 2006. Overall the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 13% in 2014. This significant growth has been fuelled by internet shopping, which had increased its share of total retail sales from 4.7% in 2008 to 10.6% in mid-2014.

3.9 Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (the most recent examples being HMV and Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear.

3.10 The table below sets out Experian's latest forecasts of the growth in the total market share of SFT between 2014 and 2031, based on retail spending growth assumptions and predictions as to the future take-up and expansion of internet shopping[9].

Table 3.2 **Projected market share of non-store retail sales, UK (%)**

	2014	2019	2024	2031
TOTAL:	**13.0%**	**17.8%**	**19.6%**	**20.1%**
Comparison	15.6%	20.4%	21.3%	20.7%
Convenience	8.5%	12.8%	15.9%	18.5%

Source: Experian Retail Planner Briefing Note 12 (October 2014); Appendix 3.

3.11 EBS forecast that non-store retailing will continue to grow rapidly over the short to medium term, outpacing traditional forms of spending. They predict that this growth will be sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping, but will slow after 2020.

[9] Please note that although no official data is available for convenience and comparison goods, EBS have provided their own market share estimates.

3.12 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('*bricks-and-mortar*') retail space, rather than from '*virtual*' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 **Projected market share of non-store retail sales, UK (%):**
Adjusted for SFT sales from stores

	2014	2019	2024	2030
TOTAL:	**8.4%**	**11.4%**	**12.5%**	**12.8%**
Comparison	11.7%	15.3%	16.0%	15.5%
Convenience	2.6%	3.8%	4.7%	5.6%

Source: Experian Retail Planner Briefing Note 12 (October 2014); Appendix 3.

3.13 Although the growth in online sales has, and will inevitably continue to impact on the need for traditional shops, some commentators believe that the development of multi-channelling as part of retailers' business models will result in internet shopping actually driving demand for 'bricks-and-mortar' stores. This may be due to the need for '*click-and-collect'* facilities in easily accessible locations (for example, on the high street, in existing out-of-centre stores or at important transport nodes), or for '*showrooms*' where customers can view and test products in store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support demand for retail space over time.

Floorspace 'Productivity' Growth

3.14 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as rents, rates and service charges) to help maintain their profitability and viability. It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing comparison and convenience goods retail floorspace.

3.15 However there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. However following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

3.16 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for non-store retailing.

Table 3.4 **Retail sale density growth rates: adjusted for non-store retailing (%)**

	2013	2014	2015	2016	2017-21	2022-35
Comparison	-1.8	-1.4	-0.3	-0.4	-0.2	+0.1
Convenience	+4.3	+5.3	+3.8	+2.3	+2.0	+2.2

Source: Experian *Retail Planner Briefing Note 12: Addendum* (October 2014); Figures 4a and 4b.

3.17 The forecasts show that the scope for sales density growth is very limited for convenience goods. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of close to +2.5% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century[10].

RETAIL DEVELOPMENT PIPELINE

3.18 The retail development pipeline slowed dramatically during the economic downturn compared with the shopping centre 'boom' experienced in the ten year period up to 2007. One of the key impacts has been to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

3.19 The latest *Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) in 2013 confirms that the quantum of completed new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m^2 in 2009, 232,000m^2 in 2010 and 280,000m^2 in 2011, no new floorspace opened in 2012. The quantum of retail development in the pipeline is also continuing to decline, with shopping centre proposal levels falling by 37% from a peak of 30 million m^2 in March 2009 to 19 million m^2 in June 2013 (CBRE data[11]). This trend is anticipated to continue over the short term at least to 2015/16.

3.20 Notwithstanding this, the BCSC research also identified the first significant signs of new development activity in 2013 following the opening of circa 140,000m^2 of new retail floorspace (including Trinity Leeds). This is set to continue with a number of major schemes opening in 2014 and 2015, including Grand Central in Birmingham and Old Market in Hereford. There are also positive signs that new investment is returning to the shopping centre market from UK-based and international funds seeking assets in prime and secondary locations that offer the potential for growth.

[10] Please note that the floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in Section 9 of this study.

[11] CBRE (June 2013) UK Shopping Centres in the Pipeline

3.21 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 100' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, or require a new approach if they are to secure new shopping centre development in the future. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "*golden decade*" of shopping centre development between 1997 and 2007.

RETAILER REQUIREMENTS

3.22 The economic downturn, in combination with other trends (such as changes in customer requirements, planning legislation and the growth in internet shopping), has created a need for retailers to review and rapidly adapt their business strategies, requirements and store formats. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm. The following highlights some of the key trends that are occurring in the convenience and comparison goods retail sectors.

Convenience Goods Retailing

3.23 The changes in the food and grocery sector over the last decade illustrate the dynamic changes in the retail industry. Some of the key trends include:

- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further, including for example the Tesco 'Express', Sainsbury's 'Local' and 'Little Waitrose' formats.
- The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response, this has resulted in the expansion of own-brand 'value' ranges by the established grocers.
- An increase in the non-food sale areas of larger superstores over the last decade, including the development of own-label clothing. In some of the stores operated by Tesco (i.e. the 'Extra' format) and Asda, for example, a significant proportion of sales area (over 50%) is often set aside for non-food retailing.
- The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping.

3.24 Over the last 12-18 months, however, the main focus for the main foodstore operators has shifted to opening more convenience store formats, and growing their market shares of online sales. At the same time applications for large store formats have slowed significantly. This will have implications for the scale and type of new floorspace required by foodstore operators across the UK, and in the Mid Sussex towns.

Comparison Goods Retailing

3.25 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, etc.).

3.26 Within town centres, some traditional high street multiple operators are also changing their formats and requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively looking for larger format new-build or existing stores in out-of-centre locations to accommodate new retail formats (such as John Lewis at Home) and display their full range of products. These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

3.27 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.28 The out-of-centre sector has also not been immune to change. Since 2007 there has been a notable downturn in the demand from traditional 'bulky goods' retailers for new space. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000m^2 gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Other 'bulky goods' operators have simply gone out of business (such as Focus DIY). Notwithstanding this, out-of-centre retailing still accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example a recent thought piece by Mary Portas, two years on from the Portas Review (see below), highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres[12].

TOWN CENTRE FUTURES

3.29 A number of high profile research reports have been commissioned over recent years that set out recommendations and guidance on how to maintain and enhance the future vitality and viability of the UK's town centres. These include:

- **The Portas Review** (2011) reports on the findings and recommendations of research led by Mary Portas into the future of the High Streets. The report presented 28 key recommendations for government, local authorities and businesses to help high streets respond to the current challenges facing them and to prevent further decline.
- **The Grimsey Review** (2013) addresses the continuing decline of many local high streets. The review highlights the dramatic impact that recent technological changes have had on consumer behaviour and the knock-on effects for high streets. It suggests that the Portas recommendations failed to adequately account for this.
- **The Distressed Town Centre Property Taskforce** (DTCP) report (November 2013) was produced by an industry-led cross sector taskforce, assembled in response to the Portas Review. The report specifically focuses on the role that property ownership, investment, development and occupation can have on town centre viability, and provides recommendations on how the property sector can act to leverage in investment for town centres and support their ongoing viability.

3.30 Table 3.5 sets out an overview of the common themes and recommendations identified by the different research in support of town centre revitalisation. Many of these recommendations have since been implemented to varying degrees by the Government, particularly those of the Portas Review.

[12] http://www.acs.org.uk/en/research/planning.cfm referenced in Why Our High Streets Still Matter: A Think Piece by Mary Portas, 30th May 2014.

Table 3.5 **Town Centre Revitalisation Strategies – What the Research Says**

Strategy	Description
Reforming the management of town centres	**Improving the ways in which town centres are managed** was a key recommendation made by the Portas Review. In response, the Government has set up 27 'Portas Pilots' and 333 Town Teams, which bring together local councils, retailers and businesses to try out new ideas to drive their local economy. Strategies to deliver change are formulated in recognition of the particular strengths of each local area. It may be too early in the process to comment on the success of these, however a recent thought piece published by Portas (May 2014) has suggested that progress has been slow. There is also **increasing financial support for Business Improvement Districts (BIDs),** which enable local businesses to take on responsibility for realising improvements in their local area. The Government has launched a BID Loan Fund to help those wishing to set up a BID in their area. **Support for local (street) markets** is also increasing, as a way to increase footfall and enhance the vibrancy of local centres. This was also a key recommendation in the Portas Review.
Making use of the planning system to protect and enhance town centres	**The planning system is being used** in various ways to enhance and protect local centres where possible. This includes maintaining use of **'town centres first'** policies (as set out in the NPPF) in order to protect town centres from unnecessary competition from out-of-town developments. Where BIDs are in place, the improved planning conditions may also facilitate development. More stringent protection has been advocated by some sources. The Portas Review included a recommendation to introduce 'exceptional sign off' for all new out-of-centre retail development in order to protect existing centres. However, this was one of the few Portas recommendations that was not taken on by the Government. **LPAs are also being encouraged to make use of CPOs** in order to address issues of fragmented ownership and to facilitate comprehensive development across a centre.
Engaging communities	**Encouraging communities to support their local high streets** and town centres is essential and was a key recommendation in the Portas Review. Recent strategies to promote community participation in the development of local centres have included government support for communities wishing to take on the responsibility for ownership and management of assets of community value, such as their local pub or shop. A £19 million fund has been set up and more than 300 assets have already been listed under the Community Right to Bid.
Leveraging investment and funding	There are a number of **new sources of public sector investment** now available to facilitate improvements to local centres. These include £3.6m of funding via the Town Teams, a High Street Innovation Fund worth £10m and High Street renewal awards to date worth £1m. The DTCP suggestion that a workable **Tax Increment Finance (TIF)** model be put in place has since been actioned by the government. This will allow LPAs to raise finance to fund development and infrastructure based on the projected future increase in business rates resulting from investment. The DTCP report has also recommended **greater engagement between LPAs and the private sector** in order to tackle the challenges faced by town centres proactively. They support the use of joint venture partnerships between the public and private sector to facilitate development. A recent report by Peter Brett[13] suggested a new method that would involve the selection of a Property Company Partner (possibly private sector) who will then fund future investment in the centre. The Property Company would be assisted by the LPA through use of CPOs and restricting leases to de-fragment the ownership of the high street.
Adapting to take on the threat from increasing internet sales	Recent research has highlighted the importance of **recognising the threat from increasing internet retailing** as an important trend that will continue over the short term. Some centres are adapting better than others for example, the incorporation of Click & Collect (delivery and returns) points into centres. Other more general strategies include ensuring adequate parking and accessibility to improve the general accessibility of the centre. The Grimsey Review recommends that **town centres focus on their role as a community hub**, where retail is just one element, creating a diverse offer which will help local centres to compete more effectively with online retailers. The DTCP recommends adapting retail capacity models in order to account for the erosion of the physical retail space requirement in the face of competition from online retail. LPAs in many secondary town centres will need to **actively plan for this future loss of retail space requirement**, particularly from the larger retailers.
Encouraging a mix of uses	A recent trend has been the growing presence and proportion of food and beverage (F&B) units within shopping centres and high streets. A BCSC report[14] suggests that there are various benefits that may result from this, and recommends that **shopping centre development include a mix of retail, F&B and leisure which are generally mutually supportive.** However, there are also warnings that this is not the whole solution to filling current vacancies left by retail decline. The BCSC recommends that F&B units in retail centres should be targeted appropriately according to the likely consumer profile. **Conversion from shops to residential uses** is also becoming one way for LPAs to make better use of underused retail space and prevent unwanted vacancy. Increased residential populations living in or near to the town centre will also improve footfall and potentially

[13] Peter Brett (2013): Investing in the High Street: Town Centre Investment Management and its role in delivering change
[14] BCSC (2014), Food and Beverage: A solution for shopping centres?

Strategy	Description
	spend in these areas. However, with high levels of pressure due to national housing shortages, there is a danger that the influx of residential development into town centres could undermine the retail and leisure functions of the centre.

3.31 Although there are positive signs that the UK is finally beginning to emerge from the economic downturn, it is clear that our town centres and high streets post-recession will be very different to the 'boom' years of the last decade. Over the short to medium term at least the economy is forecast to experience a sustained period of lower growth in consumer spending, reduced bank lending, limited access to credit and cuts in public sector expenditure. This presents significant challenges for all those involved in town centre management, development and investment.

3.32 The growth of online shopping is also impacting on the vitality and viability of many of Britain's centres and high streets. This is placing pressures on rental growth and market demand in many centres; particularly the smaller secondary centres outside the *'top 100'* shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013[15]. In our opinion, a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that high quality schemes in the strongest prime shopping locations will continue to prosper. In contrast, the weaker secondary centres and shopping locations with a more limited offer, smaller catchments and negligible market demand will struggle to attract market interest and investment.

3.33 Notwithstanding the threat of online shopping, industry experts still predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 'reach' their customers and grow their businesses. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline. With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively 'push up' rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations) and having the right size, format and specification to meet the needs of modern retailers.

[15] Peter Brett (2013), Investing in the High Street: Town Centre

3.34 Research by the BCSC has also identified an increased emphasis on asset management, as owners and developers invest in the expansion or refurbishment of existing shopping centres to increase their investment value and turnover. In the current economic climate this investment in existing assets is less risky and financially onerous than new build projects. However, as the supply of suitable units "dry up" in prime locations, so retailers will also look at alternative options for delivering growth, such as through new out-of-centre openings, increasing sales through the internet, and/or expanding internationally.

3.35 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. Potentially the next phase of out-of-centre investment could involve the transformation of some existing out-of-centre stores and shopping locations that are no longer '*fit-for-purpose*' as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and/reduced retail offer. The potential opportunities to "*reinvent*" out-of-centre shopping locations will be greatest initially where they are located close to towns that do not have the physical capacity (i.e. sequentially more preferable sites) to increase their retail offer.

3.36 In this context, it is clear that the 'top 50-100' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge will be how to revitalise the fortunes of struggling small and medium sized centres that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

4.0 SHOPPING PATTERNS & MARKET SHARE ANALYSIS

4.1 This section first defines the catchment/study area that provides the basis for the quantitative and qualitative needs assessment. It then describes the household telephone interview survey and summarises the key headlines of the survey-derived market share analysis for convenience and comparison goods retailing.

STUDY AREA & ZONES

4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using postcode geography and covers all the Mid Sussex local authority area, as well as some outlying areas (see Plan 1, **Appendix 1**).

4.3 The study area has been sub-divided into ten zones based on postcode geography and taking into account the location of the District's main centres and shopping facilities (see Plan 2, Appendix 1). These zones provide the sampling framework for the household telephone interview survey (see Table 4.1). This zone-by-zone approach also enables more detailed analysis of shopping patterns and expenditure flows both within and outside the study area for the purpose of the retail capacity assessment, in accordance with good practice.

Table 4.1 **Study Area – Zones, Postcode Sectors, Catchments and Population**

Zones	Postcode Sectors	Geographic/Catchment Areas	2014 Population
1	RH16 1, RH16 2, RH16 3, RH16 4	Haywards Heath	34,673
2	RH15 8, RH15 9, RH15 0	Burgess Hill	32,012
3	RH17 5	Haywards Heath / Burgess Hill	6,872
4	RH10 5, RH11 9, RH17 6	Crawley/ Haywards Heath	27,133
5	RH10 3, RH10 4, RH10 7	Crawley/ East Grinstead	38,408
6	RH18 5, RH19 1, RH19 2, RH19 3, RH19 4	East Grinstead	47,817
7	BN8 4, RH17 7, TN22 3	Haywards Heath/ Uckfield	17,811
8	BN6 8	Burgess Hill / Brighton	9,206
9	BN5 9, BN6 9	Burgess Hill/ Hurstpierpoint/ Hassocks	16,747
10	BN1 5, BN1 8, BN45 7	Brighton/ Hove	33,575
TOTAL:			**264,254**

Source: 2014 population estimates based on ONS 2011 Census and derived from SP's in-house *Experian MMG3 Geographic Information System* (GIS).

Notes: See Study Area Plan in Appendix 1

4.4 As the table shows, the ten zones have been broken down into geographic areas that broadly represent the primary catchments of the District's three main town centres, and the influence of competing centres and shopping locations. In this case Haywards Heath is located in Zone 1, Burgess Hill in Zone 2 and East Grinstead in Zone 6; these are the zones from where these centres would normally be expected to draw the majority of their shoppers and retail expenditure. For the purpose of this assessment we have assumed that Zones 1-6 and Zone 9 broadly represent the local authority area (although it should be noted that some of these zones extend beyond Mid Sussex District).

4.5 The table also sets out the 2014 (base year) population for the study area and zones sourced from Experian using SP's in-house *MMG3 Geographic Information System* (GIS). Experian's figures show that there are currently 264,254 people resident in the study area at 2014 based on the latest 2011 Census results.

4.6 Finally it should be noted that the study area and zones defined for this retail study update do not exactly match the area defined for the purpose of the Council's previous 2008 MSRSU. This is partly due to changes in postcode geography and our assessment of the likely catchments of the District's main centres.

MARKET SHARE ANALYSIS

4.7 NEMS Market Research carried out a telephone interview survey (HTIS) of 1,000 households across the defined study area between 28th July and 8th August 2014 to help inform the quantitative and qualitative need assessment.

4.8 The questionnaire was designed by SP, working in partnership with the Council, and is set out in **Appendix 2** along with the survey methodology. The full results are set out in **Appendix 3**.

4.9 The survey results detailing shopping patterns and consumer preferences for different types of convenience and comparison goods purchases help to inform the assessment of market shares, expenditure flows and 'current' turnovers of the main centres, foodstores and retail warehouses in Mid Sussex.

4.10 The following provides an overview of the headline market shares for convenience and comparison goods shopping.

Convenience Goods

4.11 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable household goods (such as washing up liquid, kitchen roll, bin bags, etc.). In order to determine and assess current food shopping patterns across the study area, the household survey comprised standard questions on:

- where households "normally" carry out their main 'bulk' (trolley) food purchases (question 1), how they normally travel there (question 2);
- whether households usually link their main food shopping trip with trips to other centres, stores, facilities and/or services (questions 4-5);
- whether households also regularly visit other stores for their main 'bulk' food shopping needs (question 3);

- where households carry out their more frequent 'top up' (basket) purchases (question 7); and
- the proportion of average grocery spend per household on main food purchases (question 8).

4.12 The results for 'main', 'secondary' and 'top-up' shopping are then merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. Based on the responses to question 8 we have assumed that, on average, some 75% of household expenditure is on main ('bulk') food purchases and 25% is on more frequent top-up ('basket') purchases. In the absence of survey evidence the 75%:25% split also happens to be a standard weighting commonly applied for retail assessments.

4.13 We have further broken down the 75% weighting for main 'bulk' food purchases to provide a more robust assessment of food shopping patterns and market shares by taking account of where else households shop after their main store. In this case we have assumed that 65% of household expenditure will be taken up by the main store identified (i.e. responses to question 1) and 10% by the other foodstores (i.e. responses to question 3). Overall the weighting produces a composite pattern of market shares for convenience goods spending across the study area and defined zones.

4.14 Table 1 (**Appendix 4**) sets out the (composite) market share analysis (%) for all food and convenience goods shopping in the District at 2014. The total market shares have been derived from the analysis of main food (Tables 2), secondary food (Tables 3) and top-up food shopping (Tables 4). It should be noted that these market shares exclude non-responses to questions, but at this stage they do include Special Forms of Trading (SFT)[16].

4.15 Some of the headline shopping patterns identified for food and convenience goods purchases are as briefly described below:

- As Table 1 shows, SFT/internet shopping accounts for a total market share of 6.5% across the study area as a whole. This ranges from a high of 10.8% in Zone 1 (Haywards Heath) to a low of 3.5% in Zone 3. On average some 9.3% of main food shopping purchases are via the internet (see Table 2), compared with just 0.7% for top-up shopping (Table 3).
- Reference to Experian's latest *Retail Planning Briefing Note 12* (October 2014) shows that the national average market share for non-store retailing in 2014 is 8.5%, based on data from the Office for National Statistics (ONS). The

[16] SFT includes non-store retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales. The market shares used for the economic capacity assessment in Section 9 have necessarily been recalibrated to strip out all non-store retail sales in accordance with good practice. This is because an allowance is made for the market share of SFT from the expenditure per capita estimates at the base year and over the forecast period. See Section 9 for a more detailed explanation of the capacity approach.

average market share for the study area (6.5%) is therefore slightly below the national average.

- All the District's food and convenience stores are achieving a retention level of 56.3% in the study area.
- Of this total, Haywards Heath (2.3%), Burgess Hill (6.3%) and East Grinstead (5.2%) Town Centres are achieving a total market share of 13.8%. However, this is significantly lower than for the District's main out-of-centre foodstores of 35.6%.
- The out-of-centre stores are the principal destinations for main 'bulk' food shopping in the District; with a market share of 42.8% compared with 11.8% for the three main town centres.
- The most popular foodstores in the District based on the market share analysis are the out-of-centre stores; Sainsbury's in Haywards Heath, Tesco in Burgess Hill and Sainsbury's in East Grinstead are achieving total market shares of 11.7%, 11.1% and 9.5% respectively. These market shares are higher than for the Waitrose stores in East Grinstead (4.7%) and Burgess Hill (3.5%) Town Centres, and reflect the relative scale, offer and attraction of the District's larger out-of-centre superstores.
- Hassocks (1.5%), Hurstpierpoint (0.7%) and the District's other main village centres and stores are achieving a total market share for food shopping of 6.9%. Table 4 confirms that these smaller village centres and stores principally function as day-to-day destinations for more frequent top-up purchases (22%), with a more limited share (1.1%) of main food shopping.
- In terms of the 'outflow' of shoppers and expenditure from the study area to other competing stores and centres, the market share analysis shows that Crawley (16%), Brighton (8.6%) and, to a lesser extent, Hove (2.1%) and Uckfield (1.3%) are the main destinations.
- The market shares of these competing stores inevitably vary across the study area, based on their location, proximity and accessibility to the residents in the different zones. For example, the stores in Crawley are achieving the highest market share from Zones 4 (67.6%) and 5 (62.1%), which are the closest zones to the town. Brighton's market share is highest in Zone 10 (66.6%).

Comparison Goods

4.16 Comparison (non-food) goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods (also see Glossary of Terms appended to this study).

4.17 The household survey comprised questions on a wide range of main non-food expenditure categories, as defined by Experian Business Strategies, to help inform the assessment of current shopping patterns (see **Appendix 2**, questions 11-20). These categories include clothing and footwear (question 9); large and small electrical goods (questions 12-13); books and stationary (question 15); furniture, carpets and household textiles (question 16); and DIY goods, decorating supplies and garden products (question 17).

4.18 Table 1 (**Appendix 5**) shows the market shares (%) for all comparison goods shopping purchases made both within and outside the study area, including SFT. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-12. It should be noted that the market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that that the resultant shares are not skewed by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

4.19 The key headlines of the market share analysis are briefly described below:

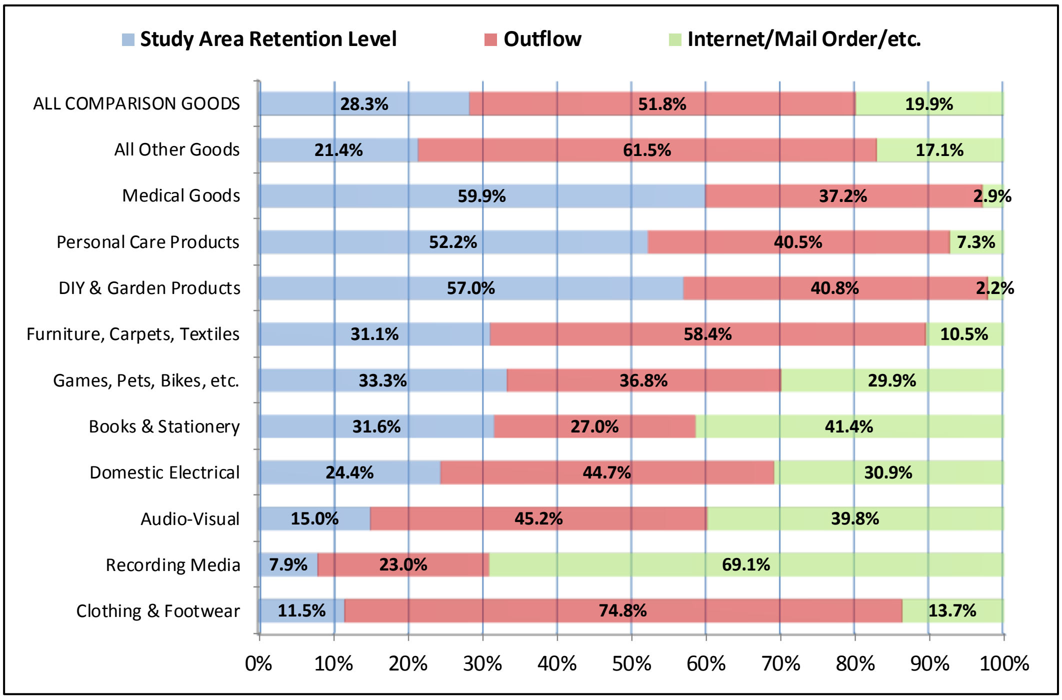
- The District's centres and stores are achieving a retention level of 28.3% in the study area.
- Crawley (22.8%) to the north-west of the study area, and Brighton to the south (13.6%) are achieving the highest market shares of centres located outside the study area. The other main competing centres include Tunbridge Wells (2.4%), Hove (2.1%), Horsham (1.3%), Croydon (1.1%) and Shoreham (1.1%).
- The market share for SFT (including purchases via the internet and mail order) is 19.9% for the study area as a whole. This ranges from a high of 29.3% in Zone 7 (which is a relatively rural area), to a low of 14.2% in Zone 10 (which is the closest zone to Hove and Brighton to the south).
- Experian's latest *Retail Planning Briefing Note 12* (October 2014) shows that the national average market share for non-store comparison goods retail sales is 15.6% in 2014. The average for the study area (19.9%) is therefore slightly above the national average figure.
- The District's centres and stores (including out-of-centre retailing) are achieving the highest retention of all comparison goods shopping in:
    - Zones 1 (47.4%) and 3 (42.9%), where Haywards Heath Town Centre is the main shopping destination;
    - Zone 2 (45.8%) and Zone 8 (43.9%) - Burgess Hill; and
    - Zone 6 (41.3%) - East Grinstead.
- The market penetration in Zones 4 (8.3%), 5 (5.9%) and 10 (2.3%) is limited. This reflects the close proximity of these zones to Crawley (Zones 4-5) and Brighton (Zone 10).

- Hassocks (0.5%), Hurstpierpoint (0.3%) and the other main villages centres and non-food stores in Mid Sussex are achieving a limited market share of comparison goods retailing in the study area (1.1%), which reflects their more limited role and function in the District's network and hierarchy of centres.

- The District's out-of-centre stores are achieving a market share within the study area as a whole of 1.8%. This relatively low market penetration reflects the limited offer and range of goods sold from the out-of-centre stores currently trading in Mid Sussex, compared with the strong competition from out-of-centre shopping facilities in Brighton, Crawley and elsewhere.

4.20 As the figure below shows, the market shares (retention levels) for the different categories of comparison goods retailing in Mid Sussex and for internet shopping vary significantly across the study area (see Tables 1-12).

Figure 4.1 **Market Shares for Different Categories of Comparison Goods Retail**



4.21 For example Mid Sussex's centres and stores are achieving a limited market share (11.5%) for clothing and footwear purchases across the study area as a whole, with a 74.8% 'outflow' to competing shopping locations. The residual market share (13.7%) is accounted for by non-store purchases (via the internet, mail order, etc.). Further analysis of market shares on a zone-by-zone basis confirms that Haywards Heath is retaining 24% of clothing and footwear expenditure in Zone 1 (its 'home zone'), Burgess Hill is achieving a market share of 15.5% in Zone 2 and East Grinstead's market share in Zone 6 is 10.7%. This represents a significant 'leakage' of trips and expenditure on clothing, footwear and fashion shopping from the District and its main centres to competing centres; principally Brighton and Crawley.

4.22 The figure also shows that centres and stores in Mid Sussex are achieving a more limited market share for recording media, audio-visual and domestic electrical products. As the figure shows, this is mainly explained by the fact that a high proportion of electrical goods sales are via the internet, mail order, etc. Some 41.4% of expenditure on books and stationery is also via the internet. This reflects national trends and the impact of multi-channel retailing on shopping preferences and expenditure.

SUMMARY

4.23 In summary, the survey-derived market shares show that all the District's food and convenience stores are achieving strong 'retention levels' in those zones covered by Haywards Heath (Zones 1 and 3), East Grinstead (Zone 6) and Burgess Hill (Zones 2 and 8). There is more limited market penetration in Zones 4, 5 and 10 due to the significant competition from foodstores in Crawley and Brighton.

4.24 The District's main out-of-centre foodstores are achieving a higher market share than for the main town centres; 35.6% across the study area as a whole, compared with 13.7% for Haywards Heath, East Grinstead and Burgess Hill. This highlights the potential to increase the market shares of the main town centres through new investment in their food and convenience goods offer, subject to the availability of suitable and viable sites. In this respect, the plans for a new Waitrose as part of the Haywards Heath Railway Station redevelopment should help to increase the town centre's overall market share by '*clawing back*' some shoppers and expenditure from competing out-of-centre stores, both within and outside the District.

4.25 In terms of comparison goods retailing, it is apparent that the District's three main town centres are facing stiff competition from the higher order centres of Crawley and Brighton for a wide range of non-food purchases; particularly for fashion shopping. This reflects the relative role and function of the District's main centres in the sub-region; and the more limited range, choice and overall quality of their comparison goods offers compared with Brighton, Crawley and other major centres and shopping destinations (such as Tunbridge Wells and Croydon). At the same time a high proportion of household expenditure on certain comparison goods categories (i.e. electrical goods, books and music) is made via the internet.

4.26 The apparent challenge for East Grinstead, Burgess Hill and Haywards Heath over the development plan period therefore will be to maintain and strengthen their market shares in some of the key comparison goods categories in the face of the strong competition from larger neighbouring centres, competing out-of-centre facilities and the growth of the internet. However, this will depend on whether market demand can be generated and satisfied in the District's main centres through new investment and development in the scale and quality of their retail floorspace.

5.0 BURGESS HILL: HEALTH CHECK ASSESSMENT

5.1 Sections 5-8 provide high-level health check updates for the main centres in Mid Sussex. Health checks are recognised as important planning 'tools' for appraising the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

5.2 In accordance with the NPPG (paragraph 005), there are a number of Key Performance Indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the KPIs include:

- the scale and diversity of uses (e.g. retail and services offer);
- retailer representation and demand;
- commercial property indicators (such as Prime Zone A Rents);
- changes in vacancy levels;
- accessibility and parking provision;
- the quality of the town centre environment;
- pedestrian footfall; and
- customers' views and behaviour.

5.3 In this case the most up-to-date and reliable KPIs have been gathered (where possible) for Burgess Hill, East Grinstead and Haywards Heath to help inform the assessment of their overall strengths and weaknesses in retail terms, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability.

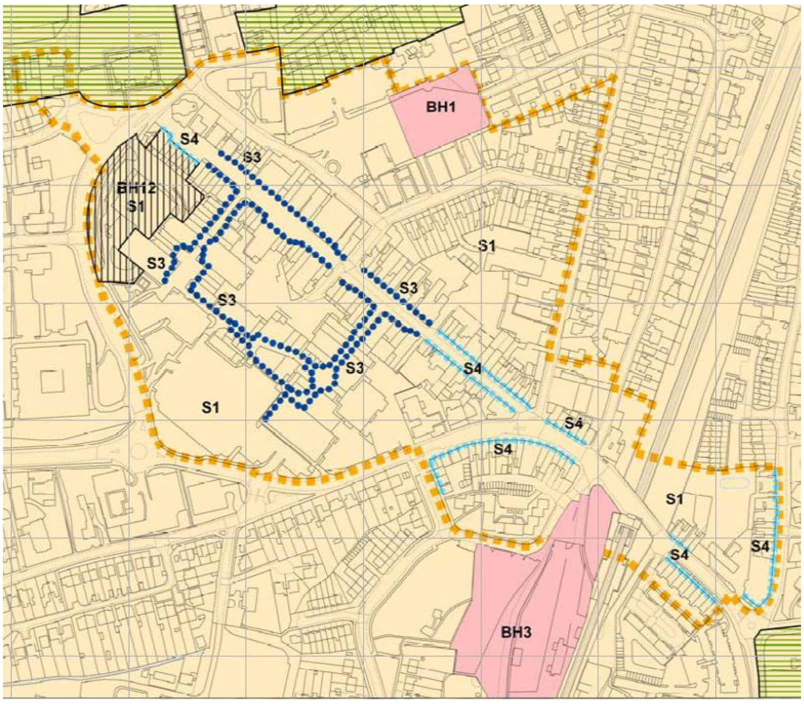
5.4 The health check assessments have been informed by analysis of the latest Experian Goad *Town Centre Category Reports*, which provide a comprehensive audit of floorspace and outlets in centres broken down by specific retail and service categories. These reports also provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres, benchmarked against Experian Goad's analysis of approximately 1,950 centres and shopping locations in the UK. The summary analysis and tables are set out in **Appendix 6**.

5.5 In addition we have also referred to other datasets and research to help assess the relative vitality and viability of the District's main town centres (including CoStar's published data on retailer requirements and Prime Zone A rental levels). This has been further supplemented by site visits and audits of the main town and village centres carried out by SP in September 2014.

RETAIL CONTEXT

5.6 Burgess Hill is located to the south of the District. The Local Plan Policies Map "*Inset 31*" is reproduced below and shows the Town Centre Shopping Policy Boundary (the orange dotted line), the Primary Shopping Frontage (the dark blue dotted line) and the Secondary Shopping Frontage (the light blue dotted line).

Figure 5-1 Burgess Hill town centre map



Source: Local Plan Proposals Map 2008, Inset 31.

5.7 The Primary Shopping Frontages include the Martlets and Market Place shopping centres, and also Church Walk. These prime shopping frontages are interconnected by pedestrianised routes, leading to increased pedestrian flows in these areas. Secondary Shopping Frontages include Church Road and the sections of Station Road which approach the roundabout with Church Walk.

5.8 The following provides a brief overview of the character, composition and general condition of the centre's main shopping areas.

- **The Martlets** shopping centre opened in 1972 and is an open air scheme with a total estimated gross floorspace of 10,300m^2 gross, comprising some 30 retail units, 5-storey office building and six residential flats. The centre was subject to refurbishment in 1992 and is owned by NewRiver Retail. It currently accommodates a number of food and non-food national multiple retailers (including Argos, New Look, Lidl and Iceland). The town's library and a community centre are situated within the shopping centre, but do not form part of NewRiver Retail's ownership. The centre benefits from direct pedestrian access to both a multi-storey and surface level car park (Station Road) to the rear.
- **Market Place** opened in 1991 as an extension to the Martlets (please note that it is not owned by NewRiver Retail). This shopping centre has an estimated floorspace of 11,148m^2 gross and is anchored by Waitrose, which

opened in 1991 and has recently benefited from an 887m^2 extension. Other national multiples in the centre include Wilkinson, Boots and WH Smith; although the majority of retailers are smaller independents. The centre also has an indoor market.

- **Other shopping frontages** include Church Walk, Church Road and Station Road, all of which flow into one another:
  - Church Walk is a pedestrianised street on to which the two shopping centres front and has some national multiple stores (e.g. Clarks).
  - Church Road generally has a higher standard of retail units and offers a more attractive environment. It is characterised by a number of smaller independent retailers, restaurants and estate agents, and also has some national multiples (such as Superdrug) and a concentration of banks (including HSBC, Lloyds TSB, Halifax, Natwest and Barclays).
  - Station Road has some more attractive historic buildings and is characterised by small businesses including cafés, estate agents and pubs.

5.9 Although previous plans for improvements to both the Martlets and the Market Place shopping centres were withdrawn in 2010, there are emerging proposals for new investment and development. As a consequence of this proposed redevelopment we understand that many of the units in the centre are currently vacant (20% observed on the site visit), as long term leases are not being renewed by the owners. This also explains why footfall was observed to be relatively low during SP's site visits.

5.10 As reported in Section 2, a number of strategic documents have been produced which give guidance on the future shape of development in the town. These include the *Burgess Hill Town Centre Masterplan* (adopted as an SPD in 2006); the *Burgess Hill Town Wide Strategy 2011* prepared by the Town Council; and the *Burgess Hill Neighbourhood Plan 2014-2034* (currently at consultation stage). The proposals set out in the 2006 Town Centre Masterplan and the more recent 2011 Town Wide Strategy helped to inform the preparation of the Mid Sussex District Plan. In summary a number of key projects have been identified for the revitalisation of the town centre, including improvements to the public realm focused on Queen Elizabeth Avenue, Civic Way and Church Walk/ Church Road.

5.11 The *Burgess Hill Town Wide Strategy 2011* also assessed the most suitable and sustainable locations to accommodate around 4,000 new homes in Burgess Hill based on the technical and visioning work conducted at the time[17]. The identified sites comprised land to the east of Kings Way (located between the railway line and the edge of Ditchling Common), with the potential to accommodate some 480 new dwellings; and land to the north of the town (known as the 'Northern Arc'), with the

[17] Including *Feasibility Study for Development Options at Burgess Hill* (Atkins, 2005) and *Burgess Hill – Visioning the Future* (David Lock Associates, 2007).

potential to accommodate up to 3,500 new dwellings. These sites have subsequently been incorporated in the *Mid Sussex District Plan 2014-2031: Consultation Draft* and are covered by Policies DP7 and DP8 (see Section 2). The new dwellings identified to meet the forecast population growth over the plan period will not only help to sustain the new retail and leisure floorspace in the neighbourhood and local centres proposed as part of these sustainable communities, but will also increase the catchment population and expenditure available to existing and new commercial floorspace and uses in Burgess Hill Town Centre.

5.12 Finally, although the *Burgess Hill Neighbourhood Plan 2014-2034* is still at draft stage it contains a number of policies that, if approved, will help guide development within the centre. The current draft town centre policies split the centre into five separate '*spatial quarters'* where new development and investment is to be focused. These include a:

- *Civic and Cultural Quarter* - centred on Cyprus Road car park and identified for a mix of development, including housing;
- *Retail Quarter* - covering the two shopping centres and surrounding area, and identified for new retail floorspace and a new square; and
- *Station Quarter* - comprising Burgess Hill station and Queens Crescent car park, and identified for redevelopment to provide a modern transport interchange, including improvements to the public realm, as well as new housing, employment/hotel and improved parking facilities.

5.13 Policies contained within the draft Neighbourhood plan also refer to support for new cultural and community facilities, including a library, theatre, new cinema and public square.

RETAIL COMPOSITION AND DIVERSITY

5.14 The assessment of the current retail and service provision in Burgess Hill (measured by outlets and floorspace) has been informed by the latest Experian Goad Town Centre Category Report conducted in 2013 (**Appendix 6**)[18].

5.15 The table below shows the changes in the composition and diversity of the town's retail and service outlets since the 2008 Retail Study was conducted.

[18] It should be noted that Experian Goad's definition of the town centre boundary used for the purpose of their surveys and reports may differ from other definitions including, for example, the boundary identified by the local planning authority in the Local Plan Proposals Map.

Table 5.1 **Burgess Hill: Change in Retail Composition by Outlets, 2008- 2013**

Category	2008 (units)	2013 (units)	2008-2013 change	2013 (% units)	UK Average (% units)
Convenience	16	15	-1	7.35	8.33
Comparison	86	58	-28	28.43	32.62
Total Service:	103	104	1	51.46	47.28
Retail Service	-	33	-	16.18	14.06
Leisure service	-	43	-	21.08	22.32
Finance and business	-	28	-	13.73	10.90
Vacant	10	27	17	13.24	11.45
Total	**215**	**204**	**-11**	**100.0%**	**100.0%**

Source: Experian Category Reports 2008 and 2013

5.16 There are currently 204 outlets in Burgess Hill; which is lower than for East Grinstead (222) and Haywards Heath (221). There has also been a decline in the town's total outlets from 215 in 2018. This fall is characterised by a marked reduction in the number of comparison goods shops (-28 units) and an increase in the number of vacant units (+17).

5.17 Burgess Hill has a total estimated (Experian Goad[19]) retail and service floorspace of 35,461m^2. This is lower than for East Grinstead (38,722m^2), but higher than for Haywards Heath (33,807m^2). The table below shows the distribution of this floorspace, benchmarked against the national average for all (circa 1,950) centres and shopping locations surveyed by Experian Goad.

Table 5.2 **Burgess Hill: Retail Composition by Floorspace, 2013**

Category	Floorspace m^2	% of total	UK average %
Convenience	5,091	14.36	14.92
Comparison	12,050	33.98	36.25
Total Service:	14,177	39.98	38.83
Retail Service	3,317	9.35	7.39
Leisure service	6,949	19.60	23.20
Finance and business	3,911	11.03	8.24
Vacant	4,143	11.68	9.28
Total	**35,461**	**100.0%**	**100.0%**

Source: Experian Category Report (August 2013)

[19] The floorspace figures are derived from the relevant Goad Plan for the Town Centre (as defined by Experian), which show the footprint floorspace only and the site area without the building lines. They should not therefore be read as a definitive report of floorspace, although they do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

5.18 Although there has been a slight fall in the number of convenience outlets since 2008, there remains a good range and choice of shops in the town centre (including three bakers and confectioners, one butcher and two off licences). The extended Waitrose stores anchors the town's convenience offer and was observed during SP's site visits to be busy on a weekday morning. Notwithstanding this, Experian Goad's data indicates that there are no fishmongers, greengrocers or CTN (confectionary, tobacco and newsagents) stores in Burgess Hill.

5.19 In 2008 the 86 comparison goods shops in the town centre represented some 40% of total outlets, which was above the national average at the time of 35.2%. The significant reduction in the number of comparison goods shops and floorspace since 2008 now means that its offer (33.98%) is below the UK average (36.25%). More detailed analysis reveals that there are 'gaps' in the town's comparison goods offer and none of the following main categories are represented:

- Antique shops, art galleries and art dealers;
- Children and infant wear;
- DIY and home improvement;
- Leather and travel goods;
- Music and video recording;
- Secondhand goods; and
- Sports, camping and leisure goods.

5.20 Burgess Hill also has an under-representation of clothing fashion and footwear retailers (4.9% of total outlets) compared with the UK average (8.3%), and there are no major department and/or variety stores in the town to help anchor its overall offer (see **Appendix 6**). This suggests that there is a need for larger format shops and floorspace in the town centre to accommodate the requirements of modern retailers and major space users, subject to retail capacity and market demand assessments.

5.21 Service businesses account for over half (51.5%) of the town's outlets, which is above the national average (47.3%). Its retail service offer (16.2%) is above the UK average (14.1%) and is largely dominated by health and beauty businesses (20 outlets). Other retail services appear to be well represented in this category, although there are no photo processing or photo studios in the town centre.

5.22 The town's leisure service provision measured in terms of outlets and floorspace is below the UK averages. The majority of the town's 43 leisure services comprise fast food and takeaway outlets (13 units), restaurants (11), cafés (6), bars (2) and public houses (3). Notwithstanding this, the total food and beverage outlets (35) represent 17.2% of total provision, which is below the national average of 18.3%. This suggests that there is potential to improve the range and quality of the town's offer to help strengthen the attraction of both its daytime and evening economy.

5.23 Although the scope of this study does not cover leisure needs for the District and its main centres, there is currently a small two screen cinema (Orion Cinema) located on Cyprus Road, set apart from the primary shopping area. We understand that a new cinema is being proposed as part of the early plans to redevelop the Martlets Centre. If this is the case then this will also help to strengthen the town's daytime and evening economy.

5.24 The Experian Goad data indicates that there are some 63 multiple retailers in the centre[20], which is lower than for both East Grinstead (81) and Haywards Heath (85). The highest representation is in the comparison category (21 units). Although it is important that town centres have a good mix of multiples and independents to promote diversity and choice, multiple retailers are important to the overall vitality and viability of centres as they help to increase the number of trips to centres, generating footfall and linked trips to the benefit of other stores and businesses.

VACANCY LEVELS

5.25 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. In this case we have drawn on the vacancy levels (measured by outlets and floorspace) recorded by the Experian Category Reports, as they provide a consistent approach at the national and local level.

5.26 However, simple assessments of the number and proportion of vacant units in centres should be interpreted with caution, as there is a natural 'churn' of units closing and opening in centres at any one time. For example, some shops may be vacant because they are undergoing refurbishment for immediate occupation, or they may be subject to redevelopment plans. Conversely, although low vacancy levels are often interpreted as a sign that a centre is performing strongly, it may also mask the fact that there is a limited supply of new floorspace to meet the needs of retailers and businesses seeking representation in the town centre.

5.27 As the table below shows, Experian recorded some 27 vacant units in the town centre in August 2013. This was equivalent to a vacancy level of 13.2%, which was slightly above the current national average for all centres recorded by Experian of 11.5%. The number of vacant outlets has increased from 10 in 2008, equivalent to a vacancy level of 4.7%.

Table 5.3 **Vacancy Rate in Burgess Hill by Unit and Floorspace**

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
27	13.24	11.45	4,143	11.68	9.28

Source: Experian Category Report 2013. Note: UK averages are for July 2014

[20] A multiple retailer is defined as being part of a network of nine or more outlets.

5.28 Similarly, the quantum of vacant floorspace has also increased to 4,143 m^2 gross; which is equivalent to 11.7% of total floorspace and is above the UK average of 9.3%. The average size of the (27) vacant units in the town centre is around 150m^2, which is small by modern standards.

5.29 The site visit conducted by SP in 2014 also identified clusters of vacancies in the Martlets Shopping Centre (5 units) and along Church Walk (5 units). Although this suggests weaknesses in the town's primary shopping area, these vacancies are mainly explained by the emerging proposals for the redevelopment of the Martlets Centre.

RETAILER REQUIREMENTS

5.30 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The CoStar Focus national retailer requirements database is a standard published dataset used to inform retail assessments and provides consistently sourced evidence detailing the changes in retailer requirements over a period of time.

5.31 The latest CoStar Report recorded just four requirements for Burgess Hill in 2014; representing a total maximum floorspace requirement of 3,066 m^2 gross. Those operators with a stated interest include national multiple A1 retailer brands and A3 service/leisure operators, as set out in the table below.

Table 5.4 **Burgess Hill: Retailer Requirements**

Category	Name	Max floorspace (m^2)
Retail	Majestic Wine	465
	Halfords Ltd[21]	743
	The Original Factory Shop	1,394
Leisure	Frankie & Benny's	465

Source: Costar FOUCS 2014

5.32 Burgess Hill town centre has been experiencing a downward trend in market demand since the onset of the economic recession in 2007, when there were 33 requirements (equivalent to a minimum floorspace requirement of circa 30,610m^2 gross). Looking further back there were eleven recorded requirements in 2002.

5.33 However, it should be noted that this downward trend in retailer requirements is mirrored by many centres in the UK. Furthermore many retailers now prefer not to publish their requirements as it could damage their negotiating position where they are seeking representation in new locations. Moreover, such databases can only identify the current level of market demand and do not reflect how demand might change in the future following new development and investment. For example experience shows that a new scheme that offers retailers modern, well-configured floorspace adjacent to

[21] It should be noted that there is an existing Halfords store on London Road in Burgess Hill. It is understood that this retailer requirement was made as part of a significant national expansion of the Halfords MOT, servicing, repair and tyre business.

like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

RETAIL RENTS

5.34 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of the centre and its prime retail pitch as a shopping location.

5.35 The 2008 Retail Study identified that Prime Zone A retail rents in Burgess Hill were generally low compared to the other town centres in Mid Sussex, although they had experienced growth from £377 per m^2 in 2003 to £484 per m^2 in 2007.

5.36 Based on our discussions with local property agents we understand that, due to the proposed redevelopment of the Martlets, leases are generally not being renewed in the shopping centre and, as a result, the town's retail rental market has remained relatively 'flat' in recent years. This has also impacted on Church Walk, onto which the shopping centre fronts.

5.37 Although there is limited information on retail rents in the area, recent deals reported by local agents do show a widening gap between the 'stagnating' rents on Church Walk and the Martlets (around £270 per m^2 maximum), with the rents achieved along Church Road (at around £430 per m^2). As the situation in the Martlets is considered 'temporary' in response to proposed development, we have used the higher rents being achieved on Church Road as the benchmark for Prime Zone A rental levels.

Table 5.5 **Comparison of Prime Retail Rents (£ per m^2)**

Centre	2008	2014	% Change 2008 to 2014
Haywards Heath	£753	£579	-23%
East Grinstead	£753	£538	-29%
Burgess Hill	**£484**	**£430**	**-11%**

Source: Costar Suite and discussion with local property agents 2014

5.38 As the table shows, Prime Zone A rents in Burgess Hill are below those recorded in Haywards Heath and East Grinstead. This is in line with the findings of the 2008 Retail Study. It should also be noted that Prime Zone As in Mid Sussex are significantly below the average rental values published by Colliers International for the South East (Autumn 2012) of £1,109 per m^2.

ACCESSIBILITY & PEDESTRIAN FLOWS

5.39 Burgess Hill town centre is well connected to populations both within and outside of the District by different modes of travel.

5.40 There are bus stops located in close proximity to the primary shopping areas, giving sustainable and easy access to the shops. The rail station is located within walking distance of the secondary shopping areas and provides access to major centres outside of the District, such as London and also Gatwick Airport. Trains run regularly from Burgess Hill to Gatwick Airport in a little as quarter of an hour. There are also regular trains between Burgess Hill and the other local centres.

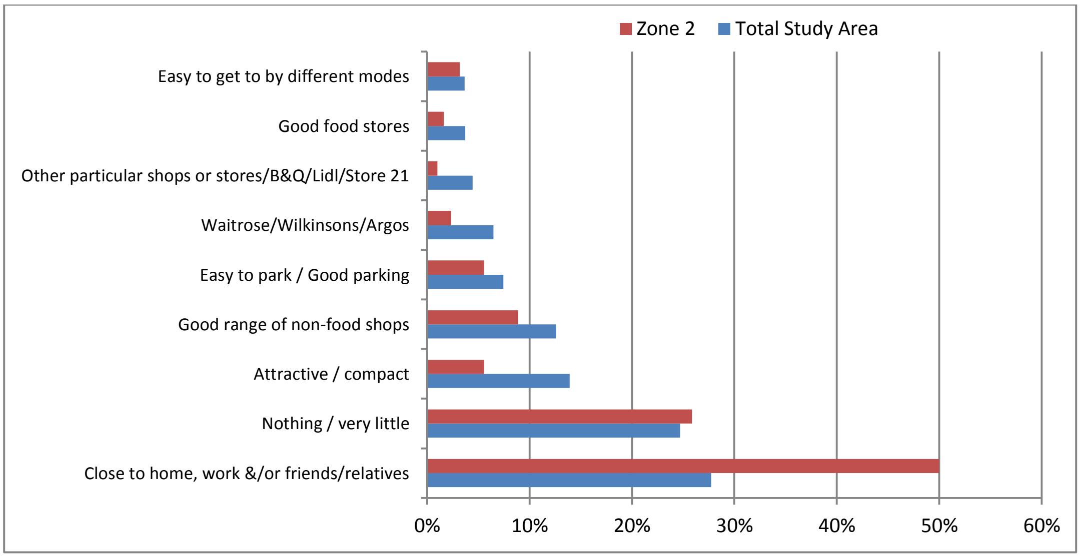
5.41 By road, the centre has access to the A23 which links to Crawley (north) and Brighton (south). There are currently a number of car parks in the centre, including multi-storey and surface car parks, providing some 691 dedicated spaces (according latest information gathered by the Council). However, a number of these have been identified in the local plan as sites for potential redevelopment, including the Burgess Hill Station yard and car park (BH3 – saved local plan policy). As a result alternative and improved car parking will be sought alongside this redevelopment opportunity.

5.42 Observations were made during the site visit regarding the pedestrian flows throughout the centre. In Burgess Hill, the busiest areas were observed to be the Market Place Shopping Centre around the Waitrose and Church Road. Church Walk and the Martlets were both less busy, with fewer shoppers observed in these areas.

CUSTOMER VIEWS AND PERCEPTIONS

5.43 Respondents to the household survey were asked what they liked about Burgess Hill town centre. The figure below shows the most frequent responses for the Study Area and for Zone 2 in which Burgess Hill is located. The respondents identified that proximity of the centre to their home was the main feature that they liked. A further 25% of the respondents stated 'nothing/ very little'. The centre was also liked for being 'attractive/ compact', and having a 'good range of non-food shops'.

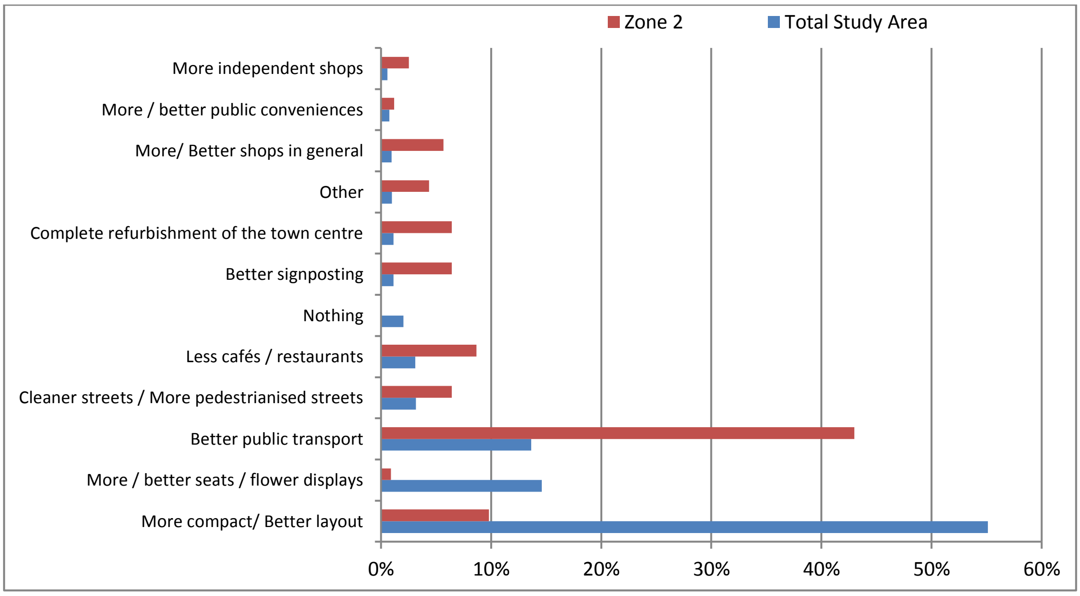
Figure 5.1 **Burgess Hill: What do people like about the town centre?**



Source: HTIS 2014

5.44 Respondents were also asked what they would like to see improved about the centre. The most popular responses were improvements the layout of the centre, the public realm and to the public transport links. This is in line with the 2008 Study, where most people identified the 'unattractive environment'.

Figure 5.2 **Burgess Hill town centre: Suggested improvements**



Source: HTIS 2014

5.45 The household survey conducted in September 2014 also asked whether respondents in the study area visit Burgess Hill for their non-food shopping and how often. The results indicate that approximately 47% of respondents visited the town centre. This represents a reduction from the responses to the 2005 survey, which was used to inform the 2008 MSRS, in which 56% of respondents indicated that they visit the town for their non-food shopping.

5.46 Of those total respondents that visit the town centre, the 2014 survey found that approximately 74% visit at least once a month, although this also represents a reduction from 80% in 2005. The table below shows that there were also reductions in the number of respondents who visit the centre one or two-three days a week. This suggests that people living in the study area are visiting the centre less frequently than was the case in 2005.

Table 5.6 **How often do you visit Burgess Hill for your non-food shopping?**

Frequency of Visit	2005 (%)	2014 (%)	Change (%)
Daily	2.9	3.1	0.2
2-6 days a week	17.7	11.2	-6.5
One day a week	26.3	21.8	-4.5
Every two weeks	14.0	18.1	4.1
Monthly	20.0	20.7	0.7
Once every two months	5.6	5.9	0.3
Three-four times a year	8.5	7.5	-1.0

Frequency of Visit	2005 (%)	2014 (%)	Change (%)
Once a year/ Less Often	4.5	9.6	+5.1
(Don't know / varies)	0.7	2.2	0.2

Source: MSRS 2008 (based on results of household survey conducted in March 2005) and the September 2014 household survey conducted to inform the 2014 Retail Study Update.
Note: Those using the town centre for the purchase of clothing, footwear and other fashion goods only.

ENVIRONMENTAL QUALITY

5.47 The environmental quality of the town centre and main shopping frontages was assessed during the site visit carried out in 2014. It was found that the quality of the urban environment and public realm varied across the different shopping streets. For example the Market Place Shopping Centre was generally well maintained, whereas there is clearly a need for new investment in the Martlets. Church Walk had a pleasant, pedestrianised public realm, although the buildings were lacking in quality or character. Church Road and Station Road both had higher quality historic buildings and appeared well maintained. The Orion cinema also appeared to be in need of investment and is not integrated with the main shopping streets.

5.48 Overall, Burgess Hill town centre is well maintained and the main shopping streets are well integrated and linked together. There are some signs of recent investment around the Waitrose store in Market Place, although neighbouring areas require further investment and development.

BURGESS HILL: OUT-OF-CENTRE RETAIL PROVISION

5.49 There is an out of centre Tesco Superstore located at Jane Murray Way, southwest of the town centre. The store has a range of comparison and convenience goods aisles and additional facilities including a petrol station, cash point, phone shop and café. At the time of the site visit on a weekday morning, the store was busy with most of the 30 tills open and the car park around half full. There is also a new business park development - Victoria Business Park - on Jane Murray Way which includes a B&Q, Homebase and Pets at Home.

NEW INVESTMENT AND DEVELOPMENT

5.50 Planning permission was granted in 2011 for an extension to the Waitrose located in Market Place (Local Authority Reference: 11/02256/OUT). The extension was completed in 2013 and increased the store's floor area from 2,586m^2 to 3,473m^2. The scheme has resulted in a slight reduction in total parking spaces from 300 to 294 spaces.

5.51 There are also plans for the redevelopment and revitalisation of both The Martlets and Market Place shopping centres that, if delivered, will provide a significant boost to the town centre's overall attraction, vitality and viability as a place to live, shop, work and visit. The emerging plans include the redevelopment of The Martlets to provide new larger format retail floorspace, along with a wider choice of food, beverage and leisure facilities. At the time of finalising this study we understand from Mid Sussex Council that the indicative plans by the owners - NewRiver Retail - are for a phased redevelopment to include:

- **Phases 1 and 2:** will involve the relocation of the Lidl store to a town centre site and the development of 150 residential units; approximately 4,500m^2 of new Class A1 (non-food) retail floorspace; 1,858m^2 of new Class A3 retail space; a new 60 bed hotel; a new library and community facilities; and the enhancement of existing public realm, including creation of a pedestrian boulevard and public square.
- **Phase 3:** will include an additional 1,858m^2 of Class A1 retail space and a new multi-screen cinema of up to 3,250m^2.

5.52 The proposed scheme will significantly strengthen the scale and quality of the town's retail and commercial leisure offer. The provision of new larger format shop units will appeal to modern national multiple fashion and non-food retailers not currently represented in the town centre, and a new multiplex cinema in the heart of the town centre will also significantly strengthen the town's daytime and evening offer. In turn the scheme should help to boost the overall market share and trading performance of the town centre in the face of increased competition from higher order centres, such as Crawley and Brighton, and the forecast growth of internet shopping.

5.53 Plans are also emerging for the proposed *Northern Arc* development, which covers the strategic housing land allocation site identified in the Draft District Plan policy DP8. The development proposals include plans for four new local centres, which are intended to support the new housing development (of around 3,500 homes). However at the time of finalising this study there were no detailed plans for the local centres, and the scale and mix of new retail floorspace proposed.

5.54 We also understand that the Council has had discussions with Network Rail regarding the potential to develop land adjoining Burgess Hill Railway Station, although no scheme or application had come forward at the time of finalising this study.

SUMMARY

5.55 Burgess Hill town centre is a compact centre, which benefits from good accessibility and a relatively good mix of retailers and service businesses. The recent extension to the Waitrose store is also a positive sign of improving investment confidence in the town centre following the impact of the economic downturn.

5.56 Notwithstanding this, a number of the town's key performance indicators (KPIs) point to underlying weaknesses in, and potential threats to its overall vitality and viability. These include:

- A significant fall in the number of comparison goods outlets since 2008 and an under-provision compared with the national average.

- An under-representation of clothing fashion and footwear retailers.
- No major department and/or larger format variety stores to help anchor the town's retail offer and attraction.
- An increase in the number of vacant units in the town centre from ten in 2008 to 27 at present. The current vacancy level (13.2%) is above the national average (11.5%).
- Relatively limited (published) market demand from retailers seeking representation in the town centre.
- An estimated decline in Prime Zone A rents since 2007/08, particularly along Church Walk and within the Martlets Centre. Estimated Prime Zone A's are lower than recorded for Haywards Heath and Burgess Hill.
- A long term deterioration and lack of investment in The Martlets, which is detracting from the town's overall shopping environment and offer.
- A decline in shopping trips and frequency of trips to the centre since 2005.

5.57 There is a clear need for new investment in the town's shopping offer and physical environment to help maintain and strengthen its competitive position. In this context the emerging proposals for new investment in The Martlets and Market Place shopping centres represent an important part of the planned revitalisation of Burgess Hill, in accordance with planning policy and the strategic vision for the town centre.

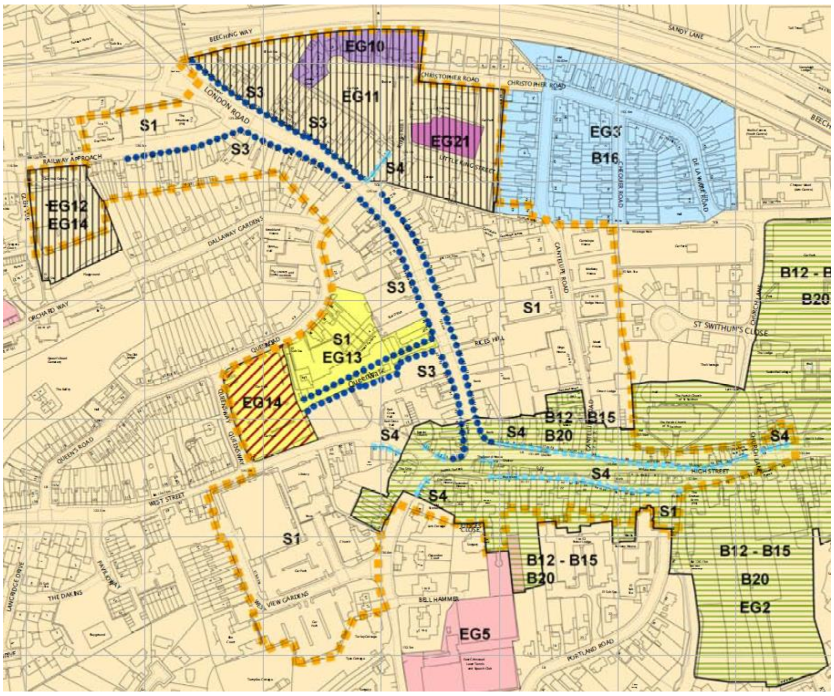
6.0 EAST GRINSTEAD: HEALTH CHECK ASSESSMENT

RETAIL CONTEXT

6.1 East Grinstead is located to the north of the District and is one of the oldest towns in the county. Its High Street is attractive and well maintained, and contains a number of buildings of historic interest, including a row of fourteenth century timber-framed units. The town also has a successful farmers' market. However the centre faces strong and increasing competition from neighbouring centres, principally Crawley which has a particularly strong retail and leisure offer and is easily accessible from the centre.

6.2 The Local Plan Policies Map "*Inset 33*" is reproduced below and shows the current definition of the Town Centre Shopping Policy Boundary (orange dotted line), the Primary Shopping Frontage (dark blue dotted line) and the Secondary Shopping Frontage (light blue dotted line).

Figure 6-2 East Grinstead town centre map



Source: Local Plan Proposals Map 2008 (Inset 33).

6.3 The Primary Shopping Frontages comprise London Road and also Queens Walk shopping precinct (which is located midway down London Road) and the upper section of Railway Approach (which links to the northern end of London Road). Secondary Shopping Frontages cover High Street and the sections of West Street and Ship Street, which approach the roundabout with High Street. The following provides a brief overview of the key shopping areas in East Grinstead town centre.

- **London Road** is the prime location for larger format retailers (including Superdrug, Curry's, Boots and WH Smith) and a limited number of national fashion and footwear retailers (including Dorothy Perkins, Fat Face, M&Co and

Clarks shoes). There is a good representation of services (including banks and estate agents) and small independent stores. The site visit conducted by SP in September 2014 identified a high number of vacancies clustered around the northern end of London Road, where the quality of units decline and footfall is generally low.

- **Queens Walk** is a shopping precinct consisting of around eight units. It is anchored by Martell's furniture and lighting store, which occupies the whole of one side of the shopping precinct, but offers little active frontage onto the precinct. The precinct also contains a number of national multiple stores, including New Look, Iceland and Argos. There is also access to a large 99p Store which fronts onto London Road. The general condition of the built environment in Queens Walk is of a lower quality when compared to the London Road and High Street. It is recognised in local planning policy that the precinct is in need of investment, although plans to revitalise it have been delayed over a number of years.
- **High Street** is an attractive secondary shopping area, leading on from the south of London Road. A high proportion of the units along this road are listed buildings. This area is dominated by A3 uses, and includes a number of independent retailers alongside national multiples (such as Prezzo, Café Nero and Pizza Express). The retail units along this street are generally occupied by high quality, specialist occupiers.

6.4 The town's anchor foodstore is Waitrose, which is set back form the main retail offer on West Street, separated from the primary and secondary retail areas. At the time of our site visits the Waitrose store was not particularly busy, with around six of the 9 tills open and no queues at the checkouts.

6.5 The *East Grinstead Town Centre Masterplan* was adopted as an SPD in 2006 and provides guidance on the future shape of development in the town. The proposals for the revitalisation of the town centre set out in the Masterplan are reflected in the emerging *Mid Sussex District Plan 2014-2031* and include public realm improvements to Queens Walk and London Road; the provision of new civic facilities and a new town square; and the redevelopment of land adjacent to the station.

6.6 The draft *Neighbourhood Plan* for East Grinstead was prepared by East Grinstead Town Council to help guide development through to 2031 and enable a step change improvement in the quality of the town centre. The objectives for the town centre include managing and balancing the need for new and accessible modern retail floorspace and car parking, with the need to maintain the town's attractive historic character and streetscape. Larger retail units will be considered on the secondary shopping frontage as part of the redevelopment of the Railway Station and at Queen's Walk, but resisted on the primary frontage. However the Town Council announced in February 2014 that they will not be progressing further with the Plan until issues relating to the adoption of the Mid Sussex District Plan have been resolved.

RETAIL COMPOSITION AND DIVERSITY

6.7 The tables below summarise the changes in the town's retail and service outlets since 2008, and its current floorspace composition, based on the latest Experian Goad *Town Centre Category Report* for East Grinstead (see **Appendix 6**).

Table 6.1 **East Grinstead: Retail Composition by Outlets, 2008-2013**

Category	2008 (units)	2013 (units)	2008-2013 change	2013 (% units)	UK Average (% units)
Convenience	14	11	-3	4.45	8.33
Comparison	83	78	-5	35.14	32.62
Total Service:	108	116	8	52.25	47.28
Retail Service	-	37	-	16.67	14.06
Leisure service	-	47	-	21.17	22.32
Finance and business	-	32	-	14.41	10.90
Vacant	19	17	-2	7.66	11.45
Total	**224**	**222**	**-2**	**100.0**	**100.0**

Source: Experian Category Reports 2008 and May 2013 (Appendix 6)

Table 6.2 **East Grinstead: Retail Composition by Floorspace, 2008**

Category	Floorspace (m^2)	% of total	UK average %
Convenience	4,394	11.35	14.92
Comparison	14,446	37.31	36.25
Total Service:	17,113	44.19	38.83
Retail Service	4,822	12.45	7.39
Leisure service	7,423	19.17	23.20
Finance and business	4,868	12.57	8.24
Vacant	2,769	7.15	9.28
Total	**38,722**	**100.0**	**100.0**

Source: Experian Category Report (May 2013)

6.8 As the table shows, East Grinstead has some 222 retail and service outlets trading from a total (Experian Goad) retail floorspace of 38,722 m^2. It is the largest centre in the District measured by both number of outlets and floorspace.

6.9 The provision of convenience retail outlets and floorspace is below the UK average. The centre's food and convenience offer is anchored by the Waitrose store, along with the Iceland store in Queens Walk and an Aldi 'deep discount' store at the northern end of London Road. Experian Goad's report shows that there are no butchers, greengrocers, fishmongers or CTNs in the town centre.

6.10 The town has a relatively good comparison goods offer; the 14,446m^2 of retail floorspace represents some 37.3% of total space, which is above the national average figure of 36.3%. However, it has an under-provision of fashion clothing and footwear shops, and there are various ‘gaps’ in its comparison goods offer including in the following categories:

- Crafts, gifts, china and glass;
- Cycles and accessories;
- Leather and travel goods;
- Menswear and accessories;
- Music and musical instruments; and
- Photographic and optical goods.

6.11 The tables show that East Grinstead has a good provision of retail services compared with the national average; it has a particularly good choice of health and beauty shops (18 outlets) and opticians (6). There is also a good representation of leisure services across all the main categories defined by Experian Goad, apart from hotels and guest houses. The town’s leisure service provision is dominated by food and beverage outlets, which account for 40 of the 47 outlets in this category. Notwithstanding this, the provision of cafés, restaurants, bars, pubs, fast food and takeaway outlets is slightly below the national average of 18.3%.

6.12 Although this study does not specifically cover leisure needs for the District and its main centres, the Atrium leisure complex located off London Road is an important facility and attraction. Apart from the Scott multi-screen Cinema, the Atrium’s offer also includes café, bar and restaurant uses. Although the scheme makes a positive contribution to the town’s commercial leisure offer and evening economy, it is also subject to restricted opening hours due to its location in close proximity to a residential area. The household survey results show (in response to Question 34) that of those that who visit the cinema in Zone 6 only, some 38% go Scott Cinema in East Grinstead, but a slightly higher proportion travel to the cinemas in Crawley (42%).

6.13 Finally, Experian Goad’s data shows that there are some 81 multiple retailers in the centre, which is higher than for Burgess Hill (63) but lower than in Haywards Heath (85). East Grinstead has a particularly strong representation of multiple retailers in the comparison and retail service sectors, with provision above the UK average. Its provision of convenience and leisure service multiples is below the national average.

VACANCY LEVELS

Experian Goad recorded some 17 vacant units in the town centre in May 2013, which was down from 19 in 2008. The current vacancy level of 7.7% is below the national average for all centres recorded by Experian of 11.5%. Furthermore the total vacant floorspace of 2,769m^2 gross represents 7.2% of total town centre floorspace and is also below the UK average of 9.3%.

Table 6.3 **Vacancy Rate in East Grinstead by Unit and Floorspace**

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
17	7.66	11.45	2,769	7.15	9.28

Source: Experian Category Report 2013. Note: UK averages are for July 2014

6.14 The site visit conducted by SP in September 2014 identified a slight increase in the number of vacant units to 19, the same as recorded in 2008. The highest number of vacancies were located on London Road (9 units) and these were generally clustered at the end of the road furthest from the junction with the High Street, where footfall is lower and units are less well maintained. There were also five vacant units on High Street, four along the secondary frontage section of London Road and one in Queens Walk.

RETAILER REQUIREMENTS

6.15 The latest CoStar Report recorded seven requirements for East Grinstead; representing a total maximum floorspace requirement of 7,023 m^2 gross. Marked demand has fallen since 2007, when there were 37 requirements. Those operators with a stated interest include national multiple A1 retailer brands and A3 service/leisure operators, as set out in the table below.

Table 6.4 **East Grinstead: Retailer Requirements, 2014**

Category	Name	Max floorspace (m^2)
Retail	Streamer Trading Ltd	427
	C & H Fabrics	465
	Halfords Ltd[22]	743
	The Original Factory Shop	1,394
	Magnet	1,208
Leisure	Tragus (representing Café Rouge, Bella Italia and Strada)	465
	Wonderworld (representing No Saints clubs)	2,323

Source: Costar FOCUS 2014

RETAIL RENTS

6.16 The 2008 MSRS identified Prime Zone A retail rents of around £753 per m^2 for East Grinstead in 2007, which represented an increase from £538 per m^2 in 2002. Based on our discussions with local property agents we estimate that average Prime Zone As currently stand at around the same levels achieved in 2002 of approximately £538 per m^2. This is higher than Burgess Hill, but lower than Haywards Heath.

[22] It should be noted that there is an existing Halfords store just outside of East Grinstead town centre. It is understood that this retailer requirement was made as part of a significant national expansion of the Halfords MOT, servicing, repair and tyre business.

Table 6.5 **Comparison of Prime Retail Rents (£ per m²)**

Centre	2008	2014	% Change 2008 to 2014
Haywards Heath	£753	£579	-23%
East Grinstead	**£753**	**£538**	**-29%**
Burgess Hill	£484	£430	-11%

Source: Costar Suite and discussion with local property agents 2014

6.17 Although the northern end of London Road is still characterised by relatively high vacancies and appears to have particularly suffered during the economic downturn in 2008/09, we understand from local agents that the situation is improving. This is illustrated by the fact that the level of vacancies along this part of London Road has halved since its height; although this may partly be explained by falling rents on the road which has made the units more affordable and attractive to new businesses. The northern end of London Road has reported rents of around £430 per m^2, whereas the end towards the High Street is reported to be achieving higher Prime Zone As of around £538 per m^2. The High Street has remained attractive to retail occupiers, although as a secondary shopping area the rental levels achieved are lower, at around £377 per m^2.

ACCESSIBILITY & PEDESTRIAN FLOWS

6.18 East Grinstead is accessible by rail via the station located on Station Approach, which provides access to London in one hour, and is a short distance from the primary shopping area. The station is also the terminus of the Bluebell railway line, a preserved steam railway attraction.

6.19 By road, East Grinstead town centre has access to the A22, which provides access directly to Crawley and the M23 motorway and also to the M25. There is also access to Royal Tunbridge Wells via the A264. The Draft Local Plan states that the centre has *"acknowledged congestion problems along the A22/A264"* that need resolving.

6.20 National Cycle Route 21 also passes through East Grinstead, part of the "*Avenue Verte*" international route between London and Paris.

6.21 There are a number of surface car parks in East Grinstead, including a large car park to the rear of Queens Walk with a pedestrian link to London Road. There is also some street parking on High Street, though all spaces were full at the time of the site visit. In total, the town centre car parks provide some 712 dedicated spaces (according to latest information sourced from the Council).

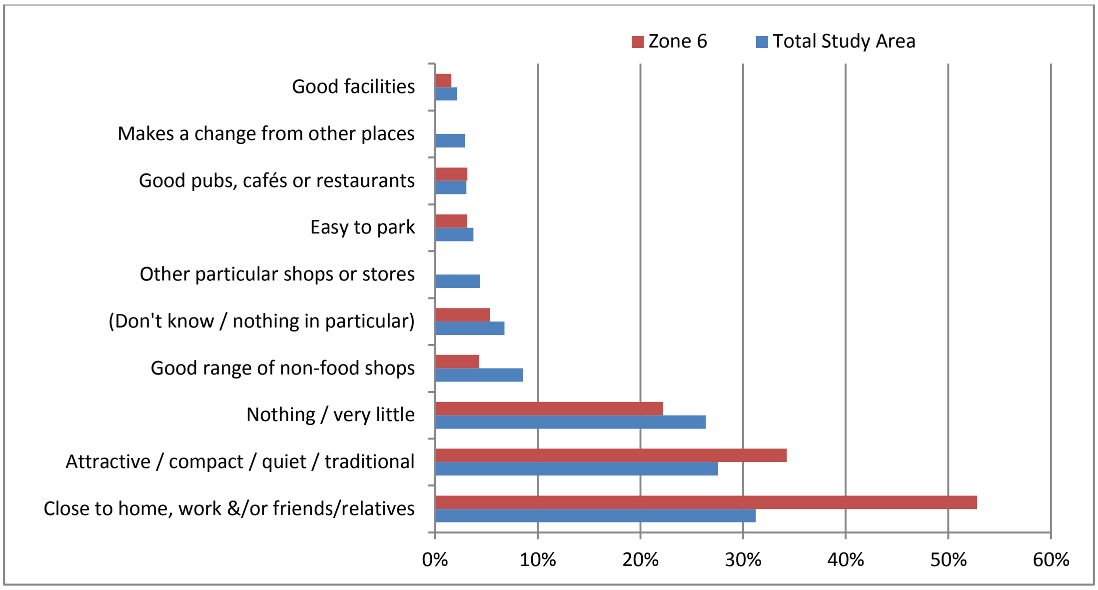
6.22 Observations were made during the site visit regarding the pedestrian flows throughout the centre. Footfall was highest in the centre along London Road, although the number of shoppers observed was lower at the northern end away from the High Street. Similarly, on the High Street the number of shoppers was lower further away from the junction with London Road. The southern side of the High Street, which had a lower footfall than the Northern side, is raised away from the street and separated from the road.

CUSTOMER VIEWS AND BEHAVIOUR

6.23 Respondents to the HTIS 2014 were asked what they liked about East Grinstead town centre. The chart below shows the most frequent responses for the whole Study Area and for Zone 6 in which East Grinstead is located.

6.24 The respondents identified that proximity of the centre to their home was the main feature that they liked. A further 26% of the respondents stated 'nothing/ very little'. The centre was also liked for being 'attractive/ compact/ quiet and traditional' (28%), and having a 'good range of non-food shops' (9%).

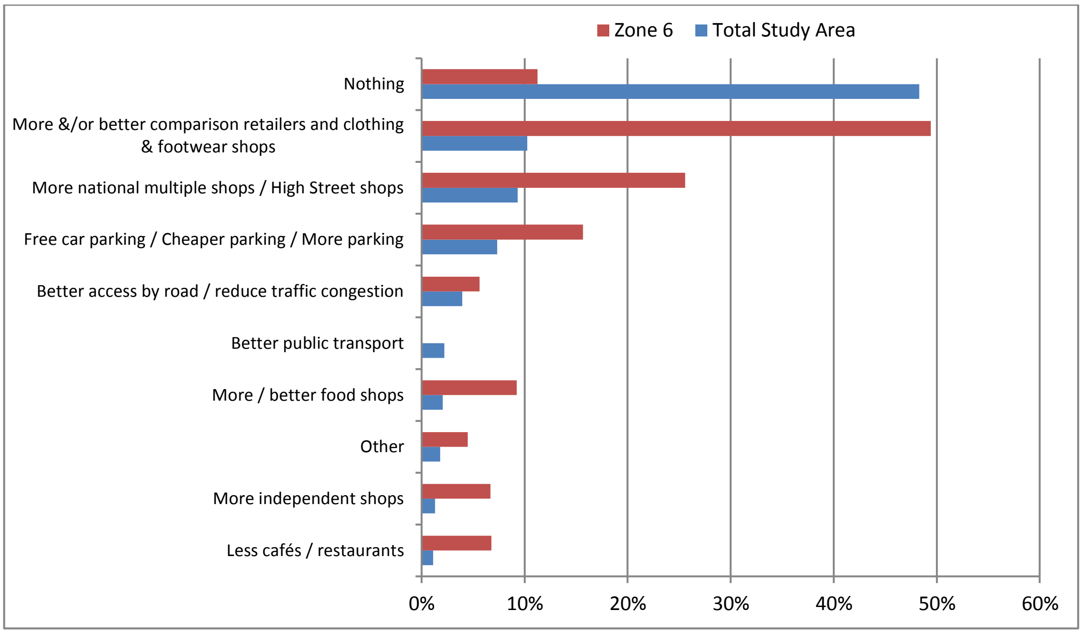
Figure 6.1 **East Grinstead: What do people like about the town centre?**



Source: HTIS 2014

6.25 Respondents were also asked what improvements to the centre would make them visit more often than they already do. The most popular responses were different for the study area as a whole and Zone 6. For the whole Study Area, the most popular response was 'Nothing' to be improved. For Zone 6, the most frequent response was 'More &/or better comparison retailers and clothing & footwear shops', followed by 'More national multiple shops / High Street shops' and 'Free car parking / Cheaper parking / More parking'.

Figure 6.2 **East Grinstead town centre: Suggested improvements**



Source: HTIS 2014

6.26 Respondents to the household survey were asked whether they visit Burgess Hill for their non-food shopping. The results showed that around 33% of respondents had visited the town centre for their non-food shopping, which is the lowest of all the three centres and was lower than the 36% recorded by the 2005 survey. The survey results also show that people living in the study area are visiting the centre less frequently than was the case in 2005.

Table 6.6 **How often do you visit East Grinstead for your non-food shopping?**

Frequency of Visit	2005 (%)	2014 (%)	Change (%)
Daily	6.4	8.1	1.7
2-6 days a week	20.6	14.3	-6.3
One day a week	28.7	18.9	-9.8
Every two weeks/ Monthly	19.3	26.7	7.4
Once every two months	6.7	6.1	-0.6
Three-four times a year	9.5	11.0	1.5
Once a year/ Less Often	6.7	13.8	7.1
(Don't know / varies)	2.2	1.0	1.7

Source: MSRS 2008 (based on results of household survey conducted in March 2005) and the September 2014 household survey conducted to inform the 2014 Retail Study Update.

Note: Those using the town centre for the purchase of clothing, footwear and other fashion goods only.

ENVIRONMENTAL QUALITY

6.27 The public realm in East Grinstead was generally well maintained and of a high standard across the core shopping area. The High Street is located within a designated

Conservation Area and contains a number of attractive historic buildings which give the centre its unique character and identity. There are also planted flower beds and hanging baskets along High Street which add to its overall attractiveness. London Road is generally well maintained, although the quality of the modern units is lower than those on High Street. Queens Walk and the secondary shopping frontage to the north of London Road are less well maintained and require investment.

EAST GRINSTEAD: OUT-OF-CENTRE RETAIL PROVISION

6.28 The Sainsbury's located on Brooklands Way is the major out-of-centre foodstore that serves the area. The store has additional facilities including a Starbucks café. Work is currently underway to incorporate an extension to the store for an electrical department and expanded café, with permission granted in February 2014 (14/00527/FUL). Once completed, this extension will add 3,394m^2 of net sales area and 206m^2 of café space. There is also an Aldi on London Road, located alongside retail warehousing units which include a Carpet Right (Beds), Majestic Wines and a Halfords, to the north of the main shopping area.

NEW INVESTMENT AND DEVELOPMENT

6.29 We understand that the Council's advisory Group - *Better Mid Sussex Advisory Group* (BMSAG) - has been working with developers to secure the delivery of a scheme at Queens Walk. Plans for an extensive redevelopment of the shopping centre are being produced in partnership between the Council and Frontier Estates, although an anchor retailer has yet to be announced. The indicative plans for Queens Walk show a scheme that builds on the SPD and aims to reinforce the linkage from London Road to the Library; create a new public square at West Street; provide additional car parking; and provide opportunities for public art. The retail elements of the proposals include a 20,000 sq ft of food retail and 13,000 sq. ft open Class A1 retail. There is currently no information on the quantum of net additional floorspace that this development represents.

SUMMARY

6.30 Overall East Grinstead is an attractive and busy historic centre with a good mix of comparison goods shops and service businesses, and relatively low vacancy levels.

6.31 Notwithstanding this, a number of the town's key performance indicators (KPIs) point to underlying weaknesses in, and potential threats to its overall vitality and viability. These include:

- The lower quality of the urban and shopping environment along some of the primary frontages, principally focused on Queens Walk.
- An under-representation of national multiple retailers.
- An under-provision of clothing and footwear shops.

- A below average provision of convenience retail floorspace.
- A decline in market demand from retailers and service businesses seeking representation in the town centre since 2007.
- A fall in Prime Zone A rents since 2007.

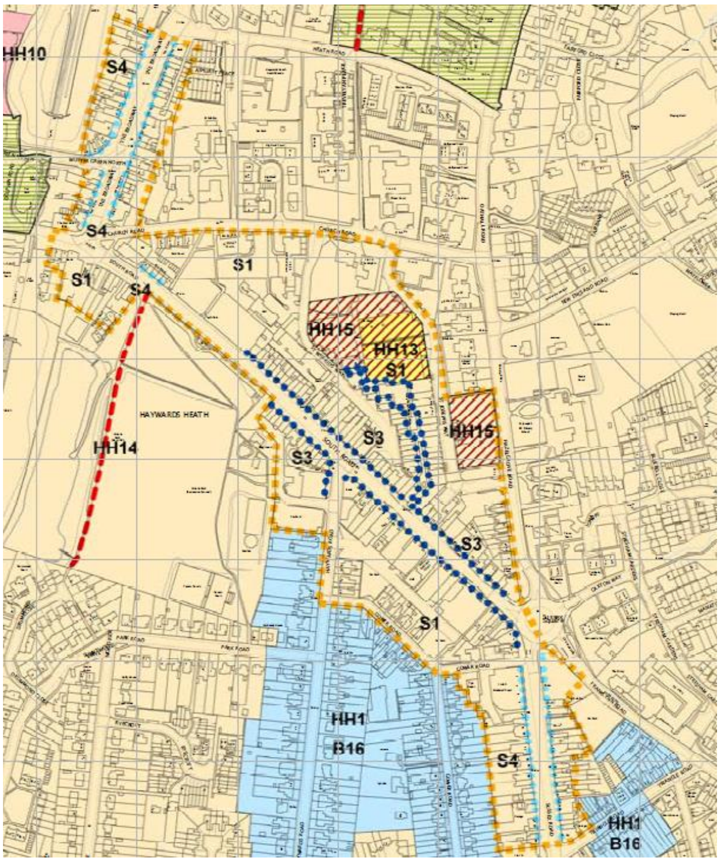
6.32 In this context the emerging plans for the redevelopment of Queens Walk represent a significant opportunity to improve the competitive position of the town centre, and help strengthen its overall vitality and viability in accordance with local plan policy and the strategic vision for East Grinstead.

7.0 HAYWARDS HEATH: HEALTH CHECK ASSESSMENT

RETAIL CONTEXT

7.1 Haywards Heath is located in the centre of the District, to the north of Burgess Hill and south of East Grinstead. The Policies Map "*Inset 35*" of the Local Plan is reproduced below and shows the extent of the town centre boundary (orange dotted line), the primary shopping frontage (dark blue dotted line) and the secondary shopping frontage (light blue dotted line).

Figure 7-3 Haywards Heath Town Centre Policies Map



Source: Local Plan Proposals Map 2008 (Inset 35).

7.2 As the plan shows the town has a linear shopping centre and its primary shopping frontage is concentrated along South Road and in the Orchards Shopping Centre off South Road. There are secondary shopping areas to the south of South Road on Sussex Road and also to the north along the Broadway. The town's main retail areas are described in more detail below:

- **South Road** is characterised by a good representation of national multiple retailers (including Laura Ashley, Boots the Chemist and WH Smith). There are also a number of independent stores, which are generally located towards the northern end of the road, and a number of banks occupying key buildings along this road.

- **The Orchards** is a partially covered shopping centre located on the north side of South Road. The centre opened in 1982 and has an estimated gross retail floorspace of 9,290m^2. The centre effectively anchors Haywards Heath's retail offer and is a key generator of trips and footfall for the town centre as a whole. Marks & Spencer, incorporating a food hall, is the main anchor store in the centre, along with a number of national multiple retailers (including Next, Holland and Barrett, Clarks, Dorothy Perkins, Accessorize and Fat Face).
- **Sussex Road** is one of two key secondary shopping areas in the town centre and is characterised by a number of smaller independent stores, including takeaways, furniture and homeware stores and service retailers. The *2006 Town Centre Masterplan* identified Sussex Road as a weak secondary shopping area, characterised by a declining physical environment and poor connections to the primary shopping area. The site visit confirmed this was still the case. There are a number of discounters and clearance stores on the street, and more limited footfall compared with the town's other shopping streets.
- **The Broadway** is also a secondary retail area and is predominantly characterised by a high proportion of cafés and restaurants, including chains such as Prezzo, Pizza Express and Café Rouge. The *2006 Town Centre Masterplan* describes the Broadway as the heart of the evening economy for the area and it is the focus for the town's leisure offer.

7.3 A large Sainsbury's store is also located towards the northern end of the town centre on the site of the former cattle market.

7.4 The *Haywards Heath Town Centre Masterplan* was adopted as an SPD in 2007 and provides guidance on the future shape of development in the town. The proposals set out in the Masterplan include environmental improvements to South Road, following completion of the Relief Road (Summer 2014) and redevelopment of sites around the station. To help address problems with pedestrian circulation through the centre, between the core shopping areas, the Masterplan recommends the consolidation of the current shopping areas and redevelopment of The Orchards to open up frontages and allow for increased circulation.

7.5 These aspirations have been carried through by the core policies of the Draft *Neighbourhood Plan* prepared by the Town Council for consultation in January 2014. The Plan supports focusing new retail development in the town centre, along with employment and residential uses, as well as improvements to the public realm. It also refers to the important role of the Town Team to help identify areas of activity and promote the town centre.

RETAIL COMPOSITION AND DIVERSITY

7.6 The tables below summarise the changes in the town's retail and service outlets since 2008, and its current floorspace composition, based on the latest Experian Goad *Town Centre Category Report* for Haywards Heath (see **Appendix 6**).

Table 7.1 **Haywards Heath: Retail Composition by Outlets, 2008 - 2013**

Category	2008 (units)	2014 (units)	2008-14 change	2014 (% units)	UK Average (% units)
Convenience	20	17	-3	7.69	8.33
Comparison	104	89	-15	40.27	32.62
Total Service:	92	97	5	43.88	47.28
Retail Service	-	33	-	14.93	14.06
Leisure service	-	38	-	17.19	22.32
Finance and business	-	26	-	11.76	10.90
Vacant	10	18	8	8.14	11.45
Total	**226**	**221**	**-5**	**100.0**	**100.0**

Source: Experian Category Reports 2008 and January 2014 (Appendix 6)

Table 7.2 **Haywards Heath: Retail Composition by Floorspace, 2014**

Category	Floorspace (m^2)	% of total	UK average %
Convenience	2,824	8.35	14.92
Comparison	16,602	49.11	36.25
Total Service:	11,873	35.11	38.83
Retail Service	3,094	9.15	7.39
Leisure service	5,035	14.89	23.20
Finance and business	3,744	11.07	8.24
Vacant	2,508	7.42	9.28
Total	**33,807**	**100.0**	**100.0**

Source: Experian Category Report (January 2014)

7.7 As the tables show, Haywards Heath has some 221 outlets trading from a total (Experian Goad) retail and service floorspace of 33,807m^2. Although it has more outlets than Burgess Hill (204), it has less floorspace than Burgess Hill (35,461m^2) and East Grinstead (38,722m^2).

7.8 There is an under-provision of convenience goods outlets and floorspace in the town centre according to Experian Goad. The main national food stores include the M&S Food Hall in The Orchards, supplemented by Tesco Express, Iceland, Co-Op and a number of smaller independent businesses. There are no fishmongers, CTNs or greengrocers in the town centre. There has been limited investment in Haywards

Heath's food and convenience offer since 2008, with just Tesco Express and a small Co-op convenience store opening in the centre. However, the scale and quality of the town's provision will be greatly improved in the short term following permission granted in February 2013 for a new (4,122m^2 gross) Waitrose store as part of the wider Haywards Heath Railway Station redevelopment (Local Authority Reference: 12/02935/FUL).

7.9 The town has a strong comparison goods offer; its retail floorspace currently accounts for some 49.1% of total space, which is significantly above the national average figure of 36.2%. It also has a relatively good provision of fashion outlets, with twenty clothing and footwear shops; equivalent to 9.1% of total outlets, which is above the national average figure of 8.3%. However, more detailed analysis of the Experian Goad report shows that there are no retailers in the following categories: catalogue showrooms; florists; music and video recordings; photographic and optical shops; and vehicle sales and accessories.

7.10 Haywards Heath has a good provision of retail services, including 19 health and beauty shops and 6 opticians, but an under-provision of leisure service outlets and floorspace compared with the national average figures. Although food and beverage outlets account for 34 out of the 38 leisure services in the town centre, total provision (15.4%) is below the UK average (18.3%). The Experian Goad report also shows that there are no cinemas, theatres and bingo halls in the defined town centre. The lack of a cinema in the town centre is reflected by the results of the household survey, which indicates that (in response to Question 34), the majority of respondents in Zone 1 travel to the cinemas in Crawley (43%).

7.11 In terms of its multiple provision Haywards Heath has 85 national operators (including major retailers such as Marks and Spencer, Next, Waterstones and WH Smith), which is higher than for East Grinstead (81) and Burgess Hill (63). The town has relatively goods multiple representation in the comparison and retail service categories, but below average provision in terms of its convenience and leisure services offer.

VACANCY LEVELS

7.12 Table 7.5 shows the vacant units and floorspace recorded by Experian Goad in Haywards Heath town centre in January 2014. As the table shows there were some 18 vacant units in 2014 (an increase from ten units in 2008); this was equivalent to a vacancy level of 8.14% and was below the national average of 11.45%. The total recorded vacant floorspace of 2,508m^2 gross represented some 7.4% of the town's total floorspace and was also below the UK average of 9.3%.

Table 7.3 **Vacancy Rate in Haywards Heath by Unit and Floorspace**

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
18	8.14	11.45	2,508	7.42	9.28

Source: Experian Category Report 2014. Note: UK averages are for July 2014

7.13 SP's site visit in September 2014 identified ten vacant units along the key shopping frontages. Of the vacancies, four were along Sussex Road, four were in The Orchards and two were on The Broadway, but there were none along South Road. Notwithstanding the relatively low vacancy rates in Haywards Heath, the *2006 Town Centre Masterplan* identified that there was a lack of suitable modern space to meet the requirements of new retailers seeking larger premises in the area.

RETAILER REQUIREMENTS

7.14 The latest CoStar Report for Haywards Heath has identified 11 requirements for representation in the town centre; equivalent to a total maximum floorspace requirement of 6,002m^2 gross. As the table below shows, the operators with a stated interest include national multiple A1 retailer brands and A3 service/ leisure operators.

Table 7.4 **Haywards Heath: Retailer Requirements in 2014**

Category	Name	Max floorspace (m^2)
Retail	Phase Eight	186
	Lloyds Pharmacy	186
	Shoe Zone	232
	Majestic Wine	465
	Card Factory UK	232
	Streamer Trading Ltd	427
	Halfords Ltd	743
	The Original Factory Shop	1,394
	Magnet	1,208
Leisure	Frankie & Benny's	465
	Tragus (representing Café Rouge, Bella Italia and Strada)	465
	Wonderworld (representing No Saints clubs)	2,323

Source: Costar FOCUS 2014

7.15 Market demand for representation in the centre has declined since 2007, when there were 37 requirements. This downward trend has occurred in most of the UK's centres over the last 5-6 years due to the impact of the economic downturn and the growth of multi-channel retailing. Notwithstanding this, the decline in Haywards Heath's recorded requirements has not been as marked as in East Grinstead and Burgess Hill. For this reason, the town has improved its national ranking based on retail requirements, rising from 249th in 2007/08 to 178th.

RETAIL RENTS

7.16 The *2008 Retail Study* identified Prime Zone A retail rents in Haywards Heath of around £753 per m^2. This was below the levels recorded in the other Mid Sussex town centres at the time, although rents had increased from £592 per m^2 in 2003.

7.17 Based on SP's discussions with local property agents we understand that Prime Zone A rents have generally fallen in the town centre since 2007/08 due to the impact of the economic downturn. They have failed to return to their pre-recession levels based on recent transactions, which show the highest recorded Prime Zone A rent as being around £635 per m^2 on the primary shopping frontage. The lowest Zone A achieved was £516 per m^2, resulting in average current Prime Zone A for the town centre of £579 per m^2.

Table 7.5 **Prime Zone A Rents (£ per m^2) in the Mid Sussex Towns, 2008-14**

Centre	2008	2014	% Change 2008 to 2014
Haywards Heath	**£753**	**£579**	**-23%**
East Grinstead	£753	£538	-29%
Burgess Hill	£484	£430	-11%

Source: Costar Suite and discussion with local property agents 2014

ACCESSIBILITY & PEDESTRIAN FLOWS

7.18 Haywards Heath town centre is easily accessible by road. The A272 (of which South Road is part) provides good east-west linkages through the core shopping area, but also results in congestion problems. The A272 links to the A273 (which runs south to Burgess Hill), the A23 (running north to Crawley and to the M23/ M25 and providing links south to Brighton) and the A22 (connecting northwards to East Grinstead).

7.19 The provision of dedicated parking spaces in the centre is more limited (as noted by the 2008 Retail Study and 2006 Masterplan), with the main car park located to the rear of the Orchard Centre. In total, the town centre car parks provide some 596 dedicated spaces (according to the latest information provided by the Council).

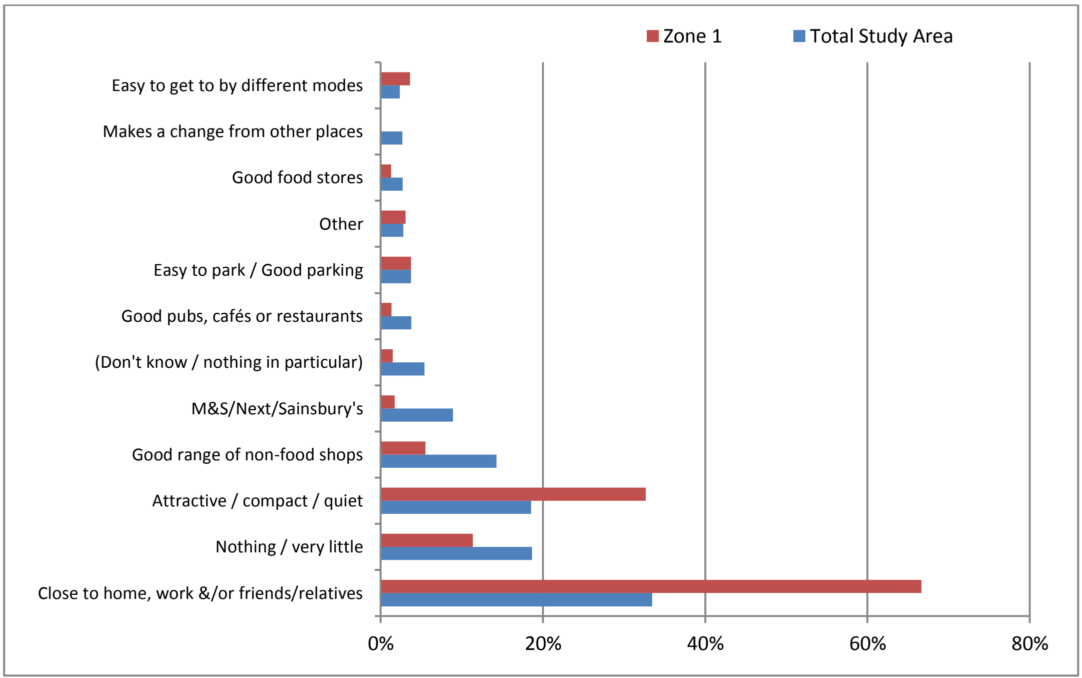
7.20 Haywards Heath train station serves the town centre, but is located outside of the town centre boundary and is some ten to fifteen minutes' walk from the main shopping area.

7.21 Observations were made during the site visit regarding the pedestrian flows throughout the centre. The number of shoppers observed was highest along South Road and in the Orchard Centre, which were busy at the time of the site visit. The Broadway was also busy when visited at midday on a weekday. In contrast, Sussex Road had a relatively low footfall.

CUSTOMER VIEWS AND PERCEPTIONS

7.22 Respondents to the HTIS 2014 were asked what they liked about Haywards Heath town centre. The chart below shows the most frequent responses for the whole Study Area and for Zone 1 in which Haywards Heath is located.

Figure 7.1 **Haywards Heath: What do people like about the town centre?**

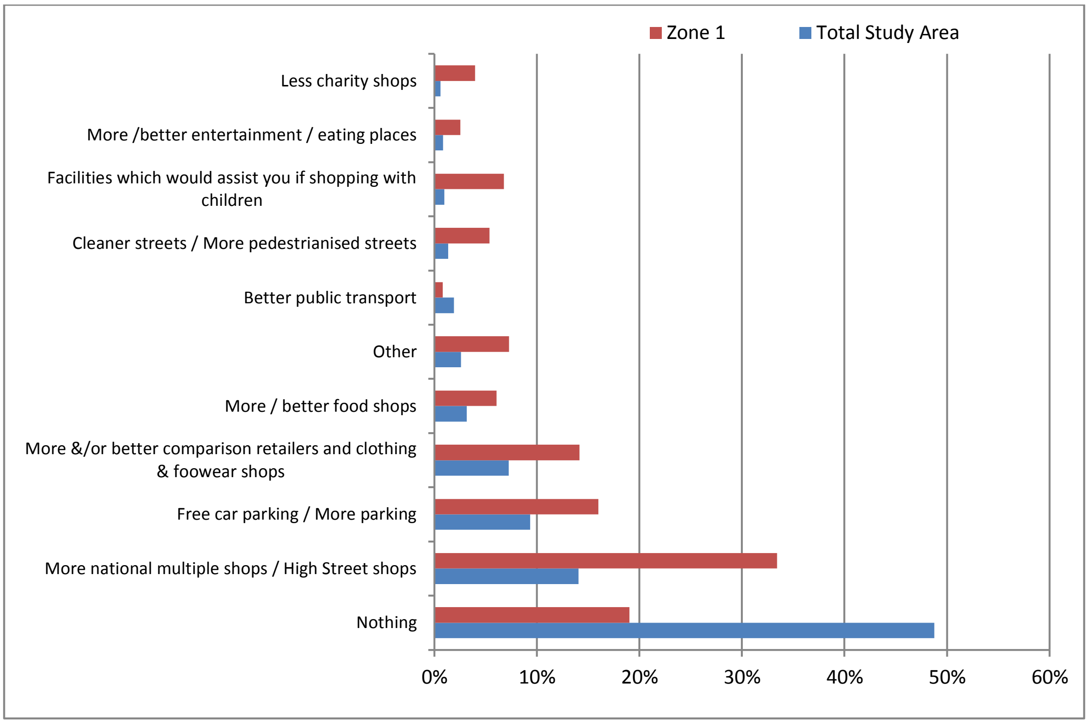


Source: HTIS 2014

7.23 As with the District's other main town centres, respondents identified that proximity of the centre to their home was the main feature that they liked about the centre. A further 19% of the respondents in the Study Area stated 'nothing/ very little'. The centre was also liked particularly by respondents in Zone 1 for being 'attractive, compact and quiet' (33%).

7.24 Respondents were also asked what improvements to the town centre would make them visit more often than they currently do. The most popular responses were different for the study area as a whole and Zone 1, where Haywards Heath is located. For the whole Study Area, the most popular response was 'nothing' but for respondents in Zone 1 the main responses identified the need for 'more national multiple shops / High Street shops', followed by 'free car parking and/or more parking'.

Figure 7.2 **Haywards Heath town centre: Suggested improvements**



Source: HTIS 2014

7.25 Respondents were also asked whether they visit Haywards Heath for their non-food shopping. Although some 53% indicated that they had visited the town centre, this represented a fall from 67% in the 2005 survey. The 2014 survey found that approximately 67% visited the centre at least once a month, which is also a reduction from 73% in 2005. The table below shows that there were reductions in the number of respondents who visit the centre at least once a week.

Table 7.6 **How often do you visit Haywards Heath for your non-food shopping?**

Frequency of Visit	2005	2014	Change
Daily	4.9	3.7	-1.2
2-6 days a week	14.7	12.6	-2.1
One day a week	21.5	15.3	-6.2
Every two weeks/ Monthly	32.2	35.5	3.3
Once every two months	8.5	10.3	1.8
Three-four times a year	10.6	11.2	0.6
Once a year/Less Often	6.3	8.6	2.3
(Don't know / varies)	1.3	2.4	-1.2

Source: MSRS 2008 (based on results of household survey conducted in March 2005) and the September 2014 household survey conducted to inform the 2014 Retail Study Update.
Note: Those using the town centre for the purchase of clothing, footwear and other fashion goods only.

ENVIRONMENTAL QUALITY

7.26 The primary shopping areas in Haywards Heath are mainly characterised by modern buildings and do not therefore offer the same points of historical interest and character as East Grinstead. Notwithstanding this we consider that South Road, the Broadway and the Orchards Shopping Centre do offer an attractive and well maintained shopping environment. At the time of our audit we noted that some of the units towards the northern end of South Road were of a lower quality and were poorly maintained. The site visit also confirmed that the environment in the Sussex Road retail area is continuing to decline, as was identified in the 2008 Retail Study.

HAYWARDS HEATH: OUT-OF-CENTRE RETAIL PROVISION

7.27 The main out-of-centre foodstore in Haywards Heath is the Sainsbury's on Bannister Way. Current provision in the store includes a pharmacy, Starbucks café, food and deli ranges and homeware offer. Permission was granted in July 2014 for an extension to the store (LA Ref: 14/01408/FUL), which will include a new café and 665m^2 of additional space. Following completion the new store will have a total gross external area of 8,740m^2, and a gross sales area of 5,294m^2. The site visit confirmed that work has commenced on the extension. The store was observed to be well used and was busy at the time of the site visit on a weekday afternoon.

NEW INVESTMENT AND DEVELOPMENT

7.28 Planning permission (LA Ref: 12/02935/FUL) was granted in February 2013 for a new Waitrose supermarket with a GIA of 4,122m^2 as part of the wider redevelopment of Haywards Heath Railway Station. According to the Retail Assessment (August 2012) submitted in support of the application, the new Waitrose will have a total sales area of 2,602m^2 net, of which 2,323m^2 net will be for convenience goods sales. In addition to the net sales area, the foodstore will include a café with a floor area of 93m^2.The permission is also for an additional 516m^2 of retail floorspace and 247m^2 of restaurant and café floorspace (Use Classes A3-A4). Additional surface and multi-storey parking will also be provided as part of this development and this should help to meet some of the identified deficiency in the scale and quality of the town's parking offer. Although the measured distance from the store to the primary shopping area (PSA) is some 550m, it should be capable of generating linked trips and expenditure to the towns other shops, businesses and facilities to the benefit of Haywards Heath's overall vitality and viability. Construction is due to commence in June 2015 and will be completed by summer 2016.

7.29 The Council has also been engaging with the leaseholders of The Orchards since 2010 to improve the quality and scale of the centre's retail offer. We understand there are indicative plans for significant investment in the centre, but these were not available at the time of finalising this study. We also understand that there is a proposed scheme to redevelop the public toilets with a café/restaurant and proposals for improvements to the public realm, although this has also not been progressed to date.

SUMMARY

7.30 Haywards Heath is an attractive centre, with a relatively good provision of comparison goods shops, fashion outlets and retail services. The town's retail offer is largely anchored by The Orchards, which includes Marks and Spencer and a number of high profile national multiple retailers. Vacancy levels are below the national average. Prime Zone A rents are also higher than recorded in Burgess Hill and East Grinstead, albeit below the levels achieved in 2007.

7.31 Notwithstanding this, a number of the town's key performance indicators (KPIs) point to underlying weaknesses in, and potential threats to its overall vitality and viability. These include weaker secondary shopping areas, a declining physical environment along Sussex Rd, and poor connections and circulation between the primary and secondary shopping areas.

7.32 In this context the permission for the new Waitrose planned as part of the wider redevelopment of the Railway Station is a positive sign of investment confidence in the town centre, and will address the current under-provision of convenience goods retailing in Haywards Heath, as well as increasing the number of parking spaces. The emerging proposals for new investment in The Orchards will also significantly benefits the attraction, vitality and viability of the town centre in the face of increased competition from neighbouring centres, out-of-centre shopping facilities and the growth in online shopping.

8.0 HASSOCKS AND HURSTPIERPOINT: HEALTH CHECKS

8.1 Hassocks and Hurstpierpoint are the District's two main village centres. Although they are substantially smaller than the three town centres, they perform an important role and function, serving the needs of their own communities and neighbouring smaller villages in the area. They generally offer a range of 'top up' convenience and key services, including post offices, banks, hairdressers and food and drink outlets.

8.2 The high level health checks carried out for these smaller village centres have principally examined the diversity of their retail and service offer; changes in vacancy levels; accessibility and parking provision; and the quality of the urban and shopping environments. This assessment is primarily based on the audits carried out by SP in September 2014. We also draw on the health check assessments undertaken as part of the *Mid Sussex Retail Study* (2008) and *Update* (2009) to help identify any significant changes in the vitality and viability of the main centres.

HASSOCKS

8.3 Hassocks village is located to the south of Burgess Hill around one mile east of Hurstpierpoint village. The main shopping area runs along Keymer Road (B2116), from the Budgen's store on Orion's' Parade to the junction with Woodsland Road.

8.4 The public realm is generally well maintained, with some planting towards Orion's parade. Operators are generally independents, though there were a number of national multiples including a Costa café and Boots pharmacy. The majority of units are located in modern, purpose-built parades of varying quality. There is a good level of car parking, including surface car parks behind the parades and some on-street parking.

8.5 The main shopping area is in close proximity to Hassocks rail station, which provides connections to London and to Gatwick airport. By Road, the A273 runs past Hassocks, providing links to the south to Brighton and north to Burgess Hill and beyond to the north of the District. Signs indicated that the village hosts a market on Saturdays.

8.6 The Neighbourhood Plan Area for Hassocks was designated in July 2012. Hassocks Parish Council is currently preparing a Neighbourhood Plan which, if adopted, will help to guide development in the settlement in line with the Local Plan over the next 20 years.

8.7 The assessment of the current retail and service provision in Hassocks centre has been informed by a site visit survey conducted as part of this study. The data has been compared to the data set out in the 2008 study, although it should be noted that this data was based on a survey undertaken in 2005. A comparison with the full *Land Use Audit* for each local centre confirmed that there has been little change in the retail composition of the centre.

Table 8.1 **Hassocks: Changes in Retail Composition, 2005-2014**

Category/Use Class	2005	2014	2005-2014 change
Convenience	8	5	-3
Comparison	22	20	-2
Service (incl. A1, A2, A3, A4, A5)	20	27	+7
A1	8	10	+2
A2	8	9	+1
A3	4	5	+1
A4	0	0	0
A5	0	3	+3
Miscellaneous	0	0	0
Vacant	1	2	+1
Total	**51**	**54**	**+3**

Source: Audit by SP in 2014 and 2005 land use survey.

Notes: Some of the differences recorded are a result of different classifications given for the same unit in the different land use surveys.

8.8 There has been an increase in the number of units in Hassocks from 51 in 2005 to 54 in 2014. There has been a marked increase in the centre's service provision (up by seven units), but the number of convenience and comparison units have decreased since 2005.

8.9 The convenience offer in Hassocks includes a butcher, delicatessen and off-licence. The town's food and convenience provision is anchored by a Budgen's supermarket at one end of Orion's' Parade. This foodstore was busy at the time of SP's site visit, on a weekday morning, and signs in the store announced that planned improvement work would soon be underway. SP also understand that one of the vacant units in the centre is being redeveloped to accommodate a Sainsbury's Local convenience store.

8.10 The quality of provision varied across the centre; with three charity shops located on the main street at the time of the survey. There was also a car service unit off the main street, which is not a service use generally found on a prime shopping street. However, the public realm along the high street was well maintained.

8.11 There was a good level of service provision, including two opticians, a dry cleaner, a pharmacy and four banks. There were also a number of hairdressers and estate agents. There was no post office, although post office services were provided within the Martin's newsagents.

8.12 The comparison offer includes homeware stores, a pet store, antique store and fashion or charity stores. The provision of food and drink was more limited and included four café/restaurants and three take away food units.

HURSTPIERPOINT

8.13 Hurstpierpoint is located approximately one mile to the west of Hassocks and has an attractive historic urban environment. The main shopping street is High Street (B2116), between Brighton Road (B2117) and South Avenue. The centre is located on the A23 road which provides easy access south to Brighton and north to Crawley and to the M23. The closest rail station is Hassock, approximately 1.7 miles away.

8.14 The town centre is covered by a Conservation Area that has been in place since 1972 to protect the unique historic character of this area. The public realm is well maintained and includes attractive green open spaces. The majority of units are independent occupiers and of a high quality, and the shops are interspersed in places with residential uses. However the town's pavements are narrow in places, making easy access and movement for pedestrians difficult.

8.15 A key concern for the centre is that the 18th century street layout and narrow footways have resulted in limited parking and traffic congestion problems. The Hurstpierpoint Neighbourhood Plan (Submission version), states that on the high street, *"Schemes shall be introduced to improve the pedestrian environment, to encourage the retailing sector" (*AIM Employment E3: Retail sector). A scheme to widen pavements and create traffic pinch points at the western end of High Street was implemented before the 2008 Retail Study and a similar scheme for the eastern end was proposed. This additional traffic calming scheme has not been implemented but remains an aspiration of the Parish Council.

8.16 The assessment of the current retail and service provision in Hurstpierpoint centre has been informed by the site visit survey conducted as part of this study. The data has been compared with the findings of the 2008 study, although it should be noted that this data was based on a survey undertaken in 2005. A detailed land use audit was not carried out for Hurstpierpoint in 2005 therefore a breakdown of the service uses for 2005 cannot be provided.

8.17 Table 8.2 shows that the number of (non-residential) units along the main high street has increased by ten to a total of 63 units; although the representation of comparison and convenience retailers has seen little change in this time. There has been an increase of one convenience unit and three comparison units.

8.18 The main convenience store is a Co-op store, which offers limited 'top-up' provision, and the centre also has a butcher, two delicatessens, a greengrocer and two off-licences. Notwithstanding this, given the overall size of the retail provision on the High Street, there may be some potential to enhance the centre's convenience offer further.

8.19 The comparison offer consists mainly of homeware and interior decoration stores of a high quality. There are also three fashion and footwear outlets.

Table 8.2 **Hurstpierpoint: Changes in retail composition, 2005-2014**

Category/Use Class	2005	2014	2005-2014 change
Convenience	6	7	+1
Comparison	16	19	+3
Service (incl. A1, A2, A3, A4, A5)	26	36	+10
A1	-	11	-
A2	-	13	-
A3	-	6	-
A4	-	3	-
A5	-	3	-
Miscellaneous	3	0	-3
Vacant	2	1	-1
Total	**53**	**63**	**+10**

Source: Audit by SP in 2014 and 2005 land use survey.

Notes: Some of the differences recorded are a result of different classifications given for the same unit in the different land use surveys.

8.20 The most significant change has been in the number of service units, which accounts for the total increase in units in the centre. There has been an increase of ten service units to 36 units in total, which represents a 39% increase since 2005. This provision includes 28% A1 retail services, the majority of which are hairdressers and also a post office, an osteopath and opticians. There is now one bank (Nationwide), which was not present when the 2005 survey was conducted.

8.21 There is also a good level of high quality food and drink provision, including six café/ restaurants, three pubs and three takeaways.

8.22 There was one vacant unit observed on High Street, although there was a sign indicating that the unit was soon to reopen as an estate agent.

SUMMARY

8.23 The two local centres at Hassocks and Hurstpierpoint are performing well in their roles as community 'hubs', meeting the more frequent retail, service and leisure needs of their local populations.

8.24 The level of service provision has increased in both centres. This has led to a better provision of essential services in some cases, such as the introduction of a bank in Hurstpierpoint since the 2005 survey was conducted.

8.25 The convenience provision is generally good and includes one small to medium sized anchor convenience store on each main street. This is supplemented by specialist provision. Given the size of Hassocks, there is potential to expand its convenience and food offer. This is demonstrated by the development of a larger unit in the centre for a Sainsbury's Local store.

8.26 The comparison offer in both centres is limited, which reflects their role and function as lower order centres in the shopping hierarchy. Hassocks has a number of charity stores, which may indicate that demand for space on the main shopping street is low.

8.27 There were limited vacancies in both centres. There was just one vacant unit on the main street in Hassocks at the time of our survey and one temporarily vacant unit in Hurstpierpoint.

8.28 The shopping environment in both centres was good, although some of the shopping parades in Hassocks are starting to appear somewhat dated and would benefit from investment in the future. Parking and access was good in Hassocks, however Hurstpierpoint continues to suffer congestion problems due to a lack of parking provision and narrow road and pavement layouts.

9.0 RETAIL CAPACITY ASSESSMENT

9.1 This section sets out the assessment of the quantitative need (capacity) for new retail (comparison and convenience goods) floorspace in the Mid Sussex District area from 2014 (the 'base year') to 2031 (the 'design year'), broken down into five year periods (i.e. 2019, 2024, 2029). This assessment updates and supersedes the Council's previous retail capacity studies.

CAPACITY APPROACH

9.2 In simple terms the quantitative capacity for new retail floorspace is generally derived from the forecast growth in population and expenditure, after making an allowance for new commitments[23], and the increased 'productivity' (or 'efficiency') of all existing and new floorspace. Capacity can also occur where there is a clearly identified "*imbalance*" between the turnover of existing facilities and the current level of expenditure in an area[24].

9.3 The **CREAT[e]** model has been specifically developed by Strategic Perspectives over a number of years to assess the capacity for, and impact of new retail (convenience and comparison goods) development and investment. The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice advice. The model draws on the market share analysis derived from the household telephone interview survey to help identify shopping patterns and expenditure flows across the defined study area. In turn this helps to inform the assessment of the current turnover and trading performance of existing centres, shops and stores at the base year.

9.4 The baseline assumptions and forecasts underpinning the **CREAT[e]** model are based on robust evidence, research and best practice. For example:

- The base year (2014) population estimates for each zone have been derived from SP's in-house (Experian MMG3) *Geographic Information System* (GIS).
- The population projections up to 2031 have been informed by a variety of sources available at the time of preparing this retail assessment, including: (i) Experian's projections for the study area and ten zones based on the 2011 ONS Census, as derived from the MMG3 GIS; (ii) the latest subnational population projections provided by Mid Sussex District Council based on the 2011 Census, but adjusted to mid-year April 2014 to reflect the start of the plan period; (iii) the strategic distribution of new housing and the resultant population growth across Mid Sussex and its main urban areas based on current permissions and likely allocations for

[23] Commitments include retail floorspace with planning permission, under construction and/or opened after the household survey was conducted.

[24] For example where there is clear evidence of significant 'leakage' of shoppers and retail expenditure from defined catchment areas to less convenient and sustainable shopping destinations and/or where there is evidence that existing centres/stores are significantly over-trading based on a range of quantitative and qualitative indicators (e.g. where stores are congested and over-crowded throughout the shopping week).

new housing at the local level. This is based on information provided by the local planning authority and takes into account the significant new housing proposed for Burgess Hill as identified by policies DP6 and DP7 of the emerging *Mid Sussex Draft District Plan 2014-2031*.

- The average retail (convenience and comparison goods) expenditure per capita levels by zone, derived from Experian's MMG3 GIS (please note all expenditure and turnover figures are expressed in 2012 prices).
- The annual growth forecasts for (convenience and comparison goods) expenditure per capita have been informed by Experian's latest *Retail Planner Briefing Note 12* (October 2014), as described in Section 3 (Table 3.1).
- The market share of 'non-store' retail sales (otherwise referred to as *Special Forms of Trading*)[25] on the expenditure per capita figures. The base year (2014) SFT figures for both convenience and comparison goods have been interpolated from the market shares derived from the recent household telephone interview survey. The forecast growth in SFT up to 2031 is in line with the national forecasts set out in Experian's latest *Briefing Note* (also see Section 3).
- The increased 'productivity' of retail (convenience and comparison goods) floorspace in Mid Sussex over the forecast period informed by Experian's *Briefing Note 12: Addendum* (October 2014) (also see Section 3).

9.5 It should be noted at the outset that long-term capacity forecasts are inherently less certain and should therefore be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a five year period (see NPPG, para 003). Notwithstanding this, the Council will also need to take account of the forecast capacity for new retail floorspace over the lifetime of the development plan; the NPPF (para 23) states that local planning authorities should meet the need for retail and town centre uses <u>in full</u>, including the potential need to expand town centres to ensure a sufficient supply of suitable sites.

9.6 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in **Appendix 7** and in **Appendix 8** respectively. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the **CREAT^e** Model are described in more detail below.

POPULATION AND EXPENDITURE FORECASTS

Population Projections

9.7 **Table 1A** sets out the base year (2014) population and projections sourced from the MMG3 GIS. It also shows the population projections to 2031 based on Experian's

[25] SFT is made up of purchases that generally occur outside of shops such as, for example, via mail order, vending machines, telephone sales, market stalls and the Internet.

'*demographic component model*', which takes into account age, gender, birth rates, ageing, net migration and death rates. Experian's population projections show a +13.3% growth for the study area as a whole between 2014 and 2031, from 264,254 to 299,296 (+35,042).

9.8 Although Experian's population projections are widely used for retail assessments, Mid Sussex Council has provided SP with the latest ONS population projections for the District. These projections are preferred for the purpose of this retail assessment as we understand that they will be used to inform the preparation of the Council's other evidence-based studies. In summary, the latest projections for Mid Sussex District show an increase in the population by 17,082 from 142,891 in 2014 to 159,973 by 2031, which is equivalent to growth of approximately +0.7% per annum.

9.9 In the absence of more detailed information as to the likely distribution of this population growth up to 2031, SP has necessarily made informed assumptions based on existing and proposed housing allocations across the District as a whole, and specifically within the defined study zones that broadly fall within the local authority area (i.e. Zones 1-6 and 9). For example, we have taken into account the fact that Burgess Hill could accommodate some 3,980 new homes in total on land to the east of at Kings Way (under Policy DP7 of the *Mid Sussex District Plan 2014-2031: Consultation Draft*) and to the north and north-west (under Policy DP8). Together these two strategic allocations could house an estimated population of some 9,353 people, based on a reasonable average household density of 2.35 people per dwelling. This represents some 55% of the total population projection growth forecast for Mid Sussex to 2031 (of 17,082). The residual population growth has then been distributed across the District's main centres and settlements based on the indicative allocations provided by the Council.

9.10 **Table 1B** sets out SP's revised population projections. Overall the study area population is projected to increase by 11.8%, from 264,254 in 2014 to 295,340 by 2031 (+31,086). The table shows the higher growth forecast for Zone 2 (+39.4%), comprising Burgess Hill, which reflects the current allocation of some 3,980 homes to the north and east of the town centre.

Expenditure Per Capita and Special Forms of Trading (SFT)

9.11 Table 2 sets out the average expenditure per capita estimates for both convenience goods (**Appendix 7**) and comparison goods (**Appendix 8**) in 2014 (2012 prices) for each of the ten study zones before an allowance is made for *Special Forms of Trading* (SFT)[26]. The 2014 average expenditure figures have been derived from our in-house Experian MMG3 Geographic Information System (GIS).

9.12 Our assessment of the most robust and appropriate allowance for SFT at the base year has been informed by the results of the household telephone interview survey. The market share analysis (**Appendix 5**) shows that some 19.9% of all comparison goods

[26] SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

expenditure in the defined study area was accounted for by internet and non-store sales (including mail order purchases). For convenience goods SFT accounted for 6.5% of total available expenditure in the study area (**Appendix 4**).

9.13 These survey-derived market share figures have been compared with the national figures published by Experian in their latest *Retail Planner Briefing Note* (October 2014) based on data published by the Office for National Statistics (ONS). The national average figures show a lower market share for comparison goods (15.6%) in 2014 and a higher share for convenience goods (8.5%).

9.14 The base year SFT market shares have necessarily been adjusted downwards in accordance with accepted approaches to reflect the fact that a significant proportion of online sales are still sourced from traditional stores rather than from dedicated ('dotcom') warehouses. Drawing on Experian's latest research we have assumed that some 25% of SFT comparison goods sales and 70% of convenience goods sales are sourced from traditional ('physical') retail space. This reduces the survey-derived market share of SFT across the study area to 15.8% for comparison goods in 2014 and to 2.2% for convenience goods. As Table 2 shows, Experian's national figures show a lower market share for comparison goods of 11.7% and a slightly higher share for convenience goods of 2.6%.

9.15 Our forecasts of the likely growth in SFT up to 2031 for both convenience and comparison goods are in line with the forecasts published by Experian in their latest *Retail Planner Briefing Note* (October 2014). We forecast a market share of 20.9% for comparison goods in 2031, which is higher than Experian's forecast of 15.5%. For convenience goods our forecast market share of 4.5% is slightly lower than Experian's figure of 5.6%.

9.16 Notwithstanding the fact that our SFT forecasts are informed by the latest survey results and Experian's forecasts, it follows that if the take-up and growth in internet shopping is stronger than forecast by Experian, and a smaller proportion of online retail sales are sourced from existing shops, then this will reduce the total retail expenditure capacity available to support existing and new retail floorspace in the study area. We therefore advise the Council to regularly monitor the research and update the forecast growth rates when necessary.

Average Expenditure Growth Forecasts

9.17 The growth in average expenditure per capita levels up to 2031 has been informed by the forecasts set out in Experian's latest *Retail Planner Brief Note* (Figure 1a). As described in more detail in **Section 3**, Experian's forecasts show for:

- **convenience goods** - negative growth in average expenditure over the short term up to 2015, with year-on-year growth thereafter forecast to average +0.6%; and

- **comparison goods** - stronger forecast annual growth over the short term (+5.6% in 2014 and +4.4% in 2015), with growth averaging +3.3% per annum up to 2031. This forecast growth is lower than historic '*ultra*' long (1973-2013) and '*medium*' term (1993-2013) trends of +4.5% and +5.9% respectively.

Total Available Expenditure

9.18 Total available retail expenditure in the study area is derived by multiplying the population and average expenditure per capita levels together. The forecasts show:

- a 20.2% (+£109.1m) growth in total **convenience goods** expenditure from £540m in 2014 to £649.1m by 2031 (Table 3, **Appendix 7**); and
- a 82.2% (+£695.3m) growth in total **comparison goods** expenditure from £846m to £1,541.3m between 2014 and 2031 (Table 3, **Appendix 8**).

9.19 The growth in comparison goods expenditure significantly outstrips convenience goods spend, which means that there should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods. This assumes no changes in the key forecasts (i.e. expenditure, population and special forms of trading) and before taking into account new commitments and an allowance for the increased 'productivity' of all existing and new floorspace.

MARKET SHARE ANALYSIS

9.20 **Section 4** described the headline results of the survey-derived (%) market share analysis (including SFT) based on the detailed tabulations set out in **Appendix 4** for convenience goods and **Appendix 5** for comparison goods.

9.21 For the purpose of the retail capacity assessment, and in accordance with good practice, the market shares (including SFT) have been adjusted for both convenience goods (Table 4, **Appendix 7**) and comparison goods (Table 4, **Appendix 8**) retailing to exclude SFT[27].

9.22 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the study area and zones to the identified centres, stores and floorspace based on the survey-derived market shares (%). This helps to establish the current '*baseline*' (2014) trading performance of the District's main centres and stores drawn from the study area. It should be noted that no allowance is made at this stage for the potential "*inflow"* (trade draw) of expenditure to the Borough's centres and stores from outside the defined study area.

9.23 For both convenience and comparison goods the 'baseline' turnovers are projected forward to 2019, 2024, 2029 and 2031 assuming no changes in market shares. This *'constant market share approach'* is a standard approach widely used and accepted for

[27] The is in accordance with the standard approach for retail assessments, which make a deduction for SFT at the outset from the expenditure per capita figures.

strategic retail assessments. However, the Council will be aware that it is highly theoretical; for example, it does not take account of the potential impact of new retail investment and development both within and outside Mid Sussex District on existing shopping patterns and market shares over time.

9.24 The following briefly reviews the performance of the District's main centres and stores within the study area based on the market share analysis.

Convenience Goods

9.25 Tables 4 and 5 (**Appendix 7**) show that, after stripping out the market shares for SFT, all the food and convenience stores in Mid Sussex are currently achieving a market share of 60.2% across the whole study area and are retaining some £325.3m of all the available expenditure (i.e. £540m) in 2014.

9.26 More detailed zone-by-zone analysis shows that the District's stores area achieving strong market shares and a higher 'retention' of available expenditure in:

- Zone 1 (Haywards Heath): 98.4% (£68.6m);
- Zone 2 (Burgess Hill): 94.8% (£60.7m); and
- Zone 6 (East Grinstead): 93.7% (£95.3m).

9.27 The existing food and convenience stores in Mid Sussex are also achieving a strong retention of available expenditure in Zone 3 (92.2%) and Zone 8 (89.1%), whereas retention levels are lowest in Zone 4 (18.2%), Zone 5 (19.5%) and Zone 10 (4.3%). These lower retention levels reflect the scale and quality of competing foodstores in Crawley, Brighton and Hove; and the fact that the stores in these locations are generally more convenient and accessible for the population living in these zones.

9.28 The forecast changes in the turnover (£ million) of the District's main stores at 2019, 2024, 2029 and 2031 are set out in Tables 6-9 of **Appendix 7**. These turnovers have been derived by applying constant market shares (Table 4) to the growth in total available expenditure (Table 3).

Comparison Goods

9.29 For comparison goods, Tables 4 and 5 (**Appendix 8**) show that all the District's centres and shops are retaining some 35.4% (£299.5m) of the total available comparison goods expenditure in the study area at 2014 (i.e. £846m).

9.30 The strongest market shares and 'retention' levels are achieved in Zone 1 (60.1% - Haywards Heath), Zone 2 (57.4% - Burgess Hill), Zone 3 (53.8%), Zone 8 (53.4%) and Zone 6 (50.5% - East Grinstead). Elsewhere the market shares in Zone 4 (9.9%), Zone 5 (7.8%) and Zone 10 (2.6%) are significantly lower, which reflects the strong competition from neighbouring centres and shopping facilities, principally Brighton, Hove and Crawley.

9.31 Tables 6-9 (**Appendix 8**) set out the forecast expenditure (£ million) allocated to the District's main centres and stores based on constant market shares at 2019, 2024, 2029 and 2031.

'INFLOW' AND BASE YEAR TURNOVER ESTIMATES

9.32 In order to provide a complete picture of the current trading (turnover) performance of the District's main centres and stores we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the study area. In the absence of detailed turnover and trade draw information for the District's centres and stores, our judgements have been informed by previous studies and retail assessments, as well as the survey and health check evidence[28]. The '*inflow*' assumptions also take account of:

- the scale, offer and location of all existing centres and stores in the District;
- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the District and Study Area; and
- the likely retail expenditure derived from people who live outside the Study Area (including visitors and commuters) in the District's main centres and stores.

9.33 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing the District's main centres and larger shopping facilities will draw a proportion of their shoppers and trade from outside the defined study area. On the other hand the District's smaller stores, village centres and local centres will draw the majority of their shoppers and trade from within their more localised catchments, with limited or no '*inflow*' from outside the study area.

9.34 For convenience goods it has reasonably been assumed that there is no net 'inflow' of expenditure from outside the defined study area due to the scale, quality and location of competing food and convenience stores in neighbouring areas.

9.35 Based on the (survey-derived) market analysis and the 'inflow' assumptions, Table 10 sets out the revised convenience and comparison goods turnover estimates for all the main centres and stores in Mid Sussex.

RETAIL COMMITMENTS

9.36 In terms of retail commitments, Table 11 (**Appendix 7**) for convenience goods and Table 11 (**Appendix 8**) for comparison goods identify the major foodstores and non-food retail floorspace either with planning permission, or recently opened (after the

[28] This includes the market share and trade draw pattern identified by the Council's *2008 Retail Capacity Study*, which covered a wider catchment than the Mid Sussex study area.

household survey was conducted)[29] based on information provided by Mid Sussex District Council and the evidence submitted in support of the planning applications. The main commitments include:

- **Haywards Heath Railway Station (ref: 12/02935/FUL):** Permission for a mixed use development by Solum Regeneration (JV between Network Rail and Kier) on land in and around Haywards Heath Railway Station to include a new Waitrose store with a net sales area of 2,323m^2 (sourced from the *Retail Assessment* submitted by Savills in August 2012). In addition the foodstore will include a cafe (93m^2) and will be served by some 208 parking spaces. There is also permission for an additional 516m^2 gross of new Class A1-A4 floorspace and it has been assumed for the purpose of this assessment that up to 20% of the new Class A1-A4 will be taken up by small-scale food and convenience goods retailing, and a further 20% will be for comparison goods retailing.
- **Haywards Heath, Walnut Park (ref: 14/01439/FUL):** Extension to One Stop to provide 149m^2 gross of additional convenience floorspace.
- **Haywards Heath, former Mayflower Public House (ref: 13/02762/COU):** To provide 814m^2 gross of new convenience goods floorspace.
- **East Grinstead, 200 London Road (ref: 13/02762/COU):** 322m^2 net of new convenience sales area.
- **Hassocks, 22-24 Keymer Road (APP/D3830/A/11/2155099/NWF):** Permission granted at appeal for the demolition of the existing building at Keymer Road and its replacement with a larger building to include an expanded ground floor retail space from 199m^2 to 274m^2. The retail unit will occupy almost all the footprint of the site at ground floor level and will be taken up by a Sainsbury's Local. Above the store will be 2-storeys of residential accommodation providing 4 flats, with 5 car parking spaces to the rear. The new store will therefore result in 75m^2 gross of additional retail floorspace.

9.37 Although we understand that there are emerging proposals in all the District's main centres to extend and improve the existing shopping centre floorspace (including the proposed redevelopment of The Martlets, Queens Walk and Orchard Shopping Centres in Burgess Hill, East Grinstead and Haywards Heath respectively), these did not have planning permission at the time of preparing this assessment and have not therefore been treated as 'commitments'.

[29] Please note that the household survey will have recorded any impact arising from new retail floorspace on shopping patterns that was completed and opened up to the date when the survey was conducted. For example, the extension to the Waitrose in Burgess Hill was completed in 2013 and will have been taken into account by the household survey.

'BASELINE' CAPACITY: DISTRICT-WIDE FORECASTS

9.38 The 'baseline' District-wide ('global') capacity forecasts for both convenience and comparison goods are based on the blended population projections sourced from Mid Sussex Council and Experian. A more detailed breakdown is also provided of the potential capacity for new floorspace in each of the District's main centres.

9.39 The capacity forecasts will enable the local planning authority to test the strategic options for the spatial distribution of new retail-led development over the plan period, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF (para 23). The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

9.40 It has necessarily been assumed for the purpose of the District-wide capacity assessment that the Borough's (convenience and comparison goods) retail market is in '*equilibrium*' at the base year. In other words we assume that the District's existing centres and stores are broadly trading in line with appropriate 'benchmark' turnover levels at the base year. On this basis any residual expenditure available to support new retail floorspace within the study area over the development plan period is derived from the difference between the forecast growth in '**current**' (survey-derived) turnover levels; and the growth in **'benchmark'** turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace[30].

Convenience Goods 'Baseline' Capacity

9.41 Table 12 (**Appendix 7**) sets out and explains the key steps underpinning the convenience goods capacity assessment. The 'baseline' expenditure and floorspace capacity forecasts are summarised in the table below:

Table 9.1 **District-wide Capacity Forecasts – Assuming 'Equilibrium' at 2014**

	2014	2019	2024	2029	2031
Residual Expenditure (£m):	£0.0	-£19.7	£0.3	£21.7	£30.1
Floorspace Capacity (m^2 net):					
- Superstore Format:	-	-1,626	26	1,784	2,475
- Supermarket/Discounter Format:	-	-3,622	58	3,973	5,512

Source: Table 12, Appendix 7.

9.42 In order to convert the residual expenditure into a net sales figure we have assumed that new floorspace occupied by the '*top 6*' grocers (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) will achieve an average sales density of

30 The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note. However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

circa £12,250 per m^2 in 2014 (2012 prices). On this basis the forecasts show that there is only limited capacity for new retail floorspace in 2024 (24m^2 net), after taking into account all known commitments (principally the Waitrose planned as part of the Haywards Heath Railway Station redevelopment). Capacity is forecast to increase to 1,784m^2 by 2029 and 2,475m^2 by 2031.

9.43 Alternatively the forecast expenditure capacity could accommodate new supermarket (e.g. Co-Op, Budgens, etc.) and/or discount floorspace (e.g. Aldi, Lidl, Netto, etc.) trading at lower average sales levels. The forecast capacity for 3,973m^2 net in 2029, increasing to 5,512m^2 by 2031.

9.44 In summary, the capacity forecasts could support one larger format superstore in a sustainable and sequentially preferable location in the District over the development plan period - preferably located either in or on the edge of an existing town centre in accordance with national and local plan policy - or a number of smaller format supermarkets/discount stores, or convenience stores. Alternatively the forecast capacity could help to support the extensions of existing stores in the most sustainable and accessible locations.

Comparison Goods 'Baseline' Capacity

9.45 Table 12 (**Appendix 8**) sets out the detailed steps in the comparison goods capacity assessment. The residual expenditure and floorspace capacity forecasts are summarised in the table below. As for convenience goods this approach assumes '*equilibrium*' at the base year and constant market shares over the forecast period.

Table 9.2 **District-Wide Capacity Forecasts – Assuming 'Equilibrium' at 2014**

	2014	2019	2024	2029	2031
Residual Expenditure (£m):	£0.0	£0.7	£32.4	£84.0	£109.7
Floorspace Capacity (m^2 net):	**0**	**117**	**4,707**	**10.950**	**13,689**

Source: Table 12, Appendix 8 (Steps 5 & 6)

9.46 As the table shows, there is limited forecast capacity for new comparison goods floorspace in Mid Sussex in 2019 (117m^2 net), although this is forecast to increase to 10,950m^2 net by 2029 and 13,895m^2 by 2031.

9.47 It should be noted that the forecast expenditure 'surplus' has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £5,500 per m^2. In our judgement and experience this is broadly equivalent to the average sales density of new comparison goods floorspace trading in prime shopping locations. However, average sales levels will inevitably vary between different locations and different types of operators[31], and this will impact on the capacity and impact of new retail floorspace. Local planning authorities will therefore

[31] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m^2, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m^2 and above.

need to take this into account when assessing and determining applications for different operators and different types of retail floorspace (such as retail warehouses for example).

'BASELINE' CAPACITY: CENTRE FORECASTS

9.48 To further help inform the Council's assessment of the potential optimum location for new retail (convenience and comparison goods) development in the District, we have also carried out a more refined (centre-by-centre) capacity assessment for Haywards Heath, East Grinstead and Burgess Hill.

9.49 It should be noted at the outset that any forecast floorspace capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in a nearby centre to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives. Furthermore if sufficient town centre and/or edge of centre sites are not available to meet the forecast capacity over the development plan period, then local planning authorities are required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible and sustainable locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, such as through linked pedestrian trips and increased footfall. Against this background, the following sets out our approach and retail capacity forecasts for Haywards Heath, Burgess Hill, East Grinstead and the District's smaller centres.

Haywards Heath

9.50 The convenience goods capacity forecasts for Haywards Heath are set out in Table 13 (Appendix 7) and in Table 13 (Appendix 8) for comparison goods. The forecasts are summarised below:

Table 9.3 **Haywards Heath - Capacity Forecasts**

	2014	2019	2024	2029	2031
CONVENIENCE GOODS:					
Residual Expenditure (£m):	-	-£28.1	-£22.6	-£16.8	-£14.5
Floorspace Capacity (m^2 net):	-	-2,326	-1,870	-1,385	-1,195
COMPARISON GOODS:					
Residual Expenditure (£m):	-	-£1.6	£7.1	£21.4	£28.5
Floorspace Capacity (m^2 net):	-	-253	1,036	2,789	3,558

Source: Table 13 (**Appendix 7 and 8)** (Steps 5 & 6)

9.51 There is no forecast capacity for new convenience goods floorspace in Haywards Heath due to the impact of the planned redevelopment of the Railway Station for a new Waitrose store and other retail floorspace. In terms of comparison goods, the forecasts show capacity for 1,036m^2 in 2024, increasing to 2,789m^2 net by 2029 and 3,558m^2 net by 2031.

Burgess Hill

9.52 The forecast capacity for new convenience (see Table 14; Appendix 7) and comparison goods (see Table 14; Appendix 8) retail floorspace in Burgess Hill is as follows:

Table 9.4 **Burgess Hill - Capacity Forecasts**

	2014	2019	2024	2029	2031
CONVENIENCE GOODS:					
Residual Expenditure (£m):	-	£5.7	£12.3	£19.4	£22.2
Floorspace Capacity (m^2 net):	-	470	1,015	1,595	1,822
COMPARISON GOODS:					
Residual Expenditure (£m):	-	£1.2	£12.9	£31.9	£41.3
Floorspace Capacity (m^2 net):	-	188	1,868	4,153	5,156

Source: Table 14 (**Appendix 7 and 8)** (Steps 5 & 6)

9.53 There is forecast capacity for 470m^2 of new convenience goods floorspace in 2019, increasing to 1,595m^2 net by 2029 and to 1,822m^2 net by 2031. In our judgement the residual expenditure capacity could support a new larger format superstore in the town centre, subject to the availability of suitable and viable sites. For comparison goods, there is forecast capacity for 1,868m^2 net in 2024, increasing to 4,153m^2 by 2029 and to 5,156m^2 net by 2031.

East Grinstead

9.54 The forecast capacity for new convenience goods (see Table 15; Appendix 7) and comparison goods (see Table 15; Appendix 8) retail floorspace in East Grinstead is as follows:

Table 9.5 **East Grinstead - Capacity Forecasts**

	2014	2019	2024	2029	2031
CONVENIENCE GOODS:					
Residual Expenditure (£m):	-	£2.3	£8.8	£15.9	£18.7
Floorspace Capacity (m^2 net):	-	187	732	1,311	1,538
COMPARISON GOODS:					
Residual Expenditure (£m):	-	£1.0	£11.1	£27.6	£35.8
Floorspace Capacity (m^2 net):	-	163	1,617	3,595	4,463

Source: Table 15 (**Appendix 7 and 8)** (Steps 5 & 6)

9.55 There is capacity for 187m^2 net of new convenience goods retail floorspace in East Grinstead at 2019 and this is forecast to increase to 1,311m^2 net by 2029 and to 1,538m^2 net by 2031. In our judgement the residual expenditure capacity could support new superstore-format floorspace in the town centre, subject to the availability of suitable and viable sites. For comparison goods, there is limited capacity of 163m^2 net in 2019, increasing to 4,463m^2 net by 2031.

Hassocks and Hurstpierpoint

9.56 In addition to the District's three main town centres we have also assessed whether there is any capacity for new retail floorspace in Hassocks, Hurstpierpoint and the other main village centres, after taking account of existing known commitments (Table 16, **Appendix 7 and 8**). The results are summarised in the table below.

Table 9.6 **Hassocks, Hurstpierpoint and other centres - Capacity Forecasts**

	2014	2019	2024	2029	2031
CONVENIENCE GOODS:					
Residual Expenditure (£m):	-	£0.5	£1.8	£3.2	£3.7
Floorspace Capacity (m^2 net):	-	42	148	260	305
COMPARISON GOODS:					
Residual Expenditure (£m):	-	£0.1	£1.3	£3.2	£4.1
Floorspace Capacity (m^2 net):	-	19	186	413	512

Source: Tables 16 (**Appendix 7 and 8)** (Steps 5 & 6)

9.57 After taking account of all commitments there is forecast capacity for 260m^2 net of new convenience goods retail floorspace in Hassocks, Hurstpierpoint and the other main village centres in 2029, increasing to 305m^2 net by 2031. This would effectively support a small convenience store in one of the main village centres over the development plan period. For comparison goods there is forecast capacity for 413m^2 net by 2029, increasing to 512m^2 net by 2031.

CAPACITY ASSESSMENT: 'SENSITIVITY' TEST

9.58 To further help inform the Council's assessment of the potential need for new retail floorspace in the District and its main centres we have assessed the robustness of the ('*baseline'*) assumption that the retail market is in '*equilibrium*' at the base year.

9.59 For convenience goods, Table 17 (Appendix 7) provides a very high level assessment of the net sales areas and 'benchmark' turnovers of the main stores and other convenience floorspace in Haywards Heath, Burgess Hill and East Grinstead Town Centres, as well as the convenience goods sales areas and turnover of the District's main out-of-centre stores[32].

[32] The sales areas and 'benchmark' turnover levels have been informed by previous retail assessments, published information (i.e. Mintel's 'Retail Rankings') and other evidence, as well as SP's informed judgements. The growth in

9.60 The base year 'benchmark' turnovers have then been compared with the 'current' (survey-derived) turnovers for the main centres and stores to determine whether stores are trading significantly above or below their anticipated levels in quantitative terms.

9.61 As Table 17 shows, all three town centres are achieving 'current' turnover levels above their anticipated 'benchmarks'. The District's main out-of-centre stores are also all trading significantly above their 'benchmark' turnovers based on published company averages. Notwithstanding the strong turnover performance of the District's food and convenience shops, we do not consider that the 'current' turnover levels identified for the main centres and out-of-centre stores justify an additional quantitative need for new convenience goods floorspace over and above that forecast by the 'baseline' capacity assessment. Based on the updated health checks and audits, SP did not identify any signs of significant overcrowding and/or congestion in the main centres and stores to indicate that the District's existing provision is unable to meet current consumer demand. Furthermore, we consider that the plans for a new Waitrose as part of the Haywards Heath Railway Station redevelopment will help to meet any pent-up demand/capacity that may currently exist in Haywards Heath and the District, as well as reduce current trading levels in some of the existing out-of-centre foodstores.

9.62 With regard to the District's comparison goods retail market we also consider that the assumption that it is in '*equilibrium*' at the base year is a robust approach based on the health check, household survey results and other evidence. Notwithstanding this, there is clearly the potential to improve the scale and quality of the retail and leisure offer in the District's three main town centres through the refurbishment and extension of existing floorspace; including the main shopping centres. In turn, this should help to improve the offer and attraction of these centres to people living within their catchments who do not visit their local town centres regularly for their retail and leisure needs. The 'claw back' of shoppers and expenditure from competing centres and shopping facilities in the sub-region (including Crawley, Brighton and Hove) will, in turn, help to increase the market shares of the District's main centres and further increase the capacity for new retail floorspace in these centres over the development plan period.

SUMMARY

9.63 This section has assessed the District-wide 'baseline' capacity for new (convenience and comparison goods) retail floorspace in the study area over the forecast period drawing on the ONS-based population projections provided by the local planning authority.

9.64 As its starting point, the strategic capacity assessment has assumed that the District's (convenience and comparison goods) retail market is in '*equilibrium*' at the base year

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'benchmark' turnovers have been informed by the latest annual 'productivity' growth rates published by Experian in their Retail Planner Briefing Note.

and held market shares constant over the forecast period. The updated capacity forecasts take into account all the known major retail floorspace commitments in the District at the time of preparing this study.

9.65 For convenience goods there is only limited District-wide capacity for new retail floorspace in 2024 ($26m^2$ net), as the planned new Waitrose store that forms part of the Station Redevelopment in Haywards Heath will effectively 'soak' up any quantitative need for new retail floorspace over the short/medium term. Over the development plan period (up to 2031) there is forecast capacity for $2,475m^2$ net of new convenience goods floorspace, the majority of which is directed towards Burgess Hill and East Grinstead.

9.66 For comparison goods there is limited capacity for new retail floorspace in the District in 2019 ($117m^2$), although capacity is forecast to increase to $10,950m^2$ net by 2029 and to $13,689m^2$ by 2031. The forecast capacity at 2031 is fairly evenly distributed between Haywards Heath ($3,558m^2$), Burgess Hill ($5,156m^2$) and East Grinstead ($4,463m^2$). There is more limited capacity forecast for Hassocks, Hurstpierpoint and the District's other smaller main village centres of $305m^2$ net.

9.67 Meeting the need for the forecast new retail floorspace in full over the next 3-5 years and over the lifetime of the development plan will clearly depend on the Council identifying suitable and viable sites and redevelopment opportunities in the District's main centres that are either available now, or will be available at some point in the next 5, 10 and 15 year periods.

9.68 If appropriate sites and redevelopment opportunities are not likely to come forward over the development plan period, then consideration should be given by the Council to sites on the edge of these centres that are well connected to the primary shopping areas and are capable of reinforcing the pedestrian retail circuit and generating linked trip expenditure to the benefit of each centre's overall vitality and viability.

9.69 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term. The Council should take into account these margins for error when assessing the need for new retail floorspace, particularly post 2024.

10.0 SUMMARY & CONCLUSIONS

10.1 This study provides a high level assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace in Mid Sussex District and its three main Town Centres (namely Burgess Hill, East Grinstead and Haywards Heath) and Village Centres (principally Hassocks and Hurstpierpoint) over the development plan period, up to 2031.

10.2 The quantitative and qualitative need assessment is based on a robust evidence base and new research, including health checks and audits of the District's main centres; and a telephone interview survey of some 1,000 residents in Mid Sussex and a wider study area to help identify current shopping patterns and preferences. Where possible, the updated evidence has been compared and contrasted with the findings of previous studies conducted for the local planning authority to help identify any critical changes in shopping patterns, and the overall performance, vitality and viability of the District's main centres.

10.3 The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the *National Planning Policy Framework* (NPPF) and the *National Planning Practice Guidance* (NPPG), which place weight on the development of positive plan-led visions and strategies for town centres.

10.4 This final section summarises the study's key findings. It provides high level advice on how the local planning authority can effectively plan for, manage and promote the vitality and viability of the District's main centres over the development plan period in accordance with the main requirements of the NPPF (paragraph 23). Where the need for new retail (convenience and comparison) floorspace is identified, high level advice is provided on how to meet this need in full; including whether there may be a requirement to plan for the expansion (or contraction) of town centres.

10.5 Although the scope of the retail study does not extend to include leisure, offices and other main town centre uses defined by the NPPF (Annex 2)[33], the household telephone interview survey and town centre health checks commissioned for the purpose of this study will provide part of the robust evidence base required by the local planning authority to inform future leisure and town centre needs assessments. We advise Mid Sussex District Council that it should update its leisure needs assessment as a priority to help inform future plan-making and ensure conformity with the NPPF.

[33] Commercial leisure uses include cinemas, night clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls; and other main town centre uses include offices, theatres, galleries, hotels etc.

SHOPPING PATTERNS & MARKET SHARE ANALYSIS

10.6 The study area and ten sub zones defined for the purpose of this study (Appendix 1) provide the necessary robust framework for the telephone interview survey of some 1,000 households conducted by NEMS Market Research (Appendices 2 and 3).

10.7 This survey has helped to establish current shopping patterns and market shares across the District and wider study area for different types of convenience and comparison goods purchases, including special forms of trading (Appendices 4 and 5).

10.8 In summary, the market share analysis used for the purpose of the retail capacity assessment (i.e. after making an allowance for SFT) shows that all the District's food and convenience stores are achieving a market share of 60.2% across the defined study area. The 'retention levels' are significantly higher in those zones covered by Haywards Heath (Zones 1 and 3), East Grinstead (Zone 6) and Burgess Hill (Zones 2 and 8), ranging from 89.1% (Zone 8) to 98.4% (Zone 1). There is more limited market penetration in Zone 4 (18.2%), Zone 5 (19.5%) and Zone 10 (4.3%) due to the significant competition from foodstores in Crawley and Brighton and Hove.

10.9 The District's main out-of-centre foodstores are achieving a higher market share (38.1%) than for the three main town centres (14.8%) across the study area as a whole. This highlights the potential to increase the market shares of the main town centres through new investment in their food and convenience goods offer, subject to the availability of suitable and viable sites. In this respect, the plans for a new Waitrose as part of the Haywards Heath Railway Station redevelopment should help to increase the town centre's overall market share by '*clawing back'* some shoppers and expenditure from competing out-of-centre stores, both within and outside the District.

10.10 In terms of comparison goods retailing it is apparent that the District's three main town centres are facing strong competition from the higher order centres of Crawley and Brighton for a wide range of non-food purchases; particularly for fashion shopping. This reflects the relative role and function of the District's main centres in the sub-region; and the more limited range, choice and overall quality of their comparison goods offers compared with Brighton, Crawley and other major centres and shopping destinations in the sub region (such as Tunbridge Wells and Croydon).

10.11 For example, the market share analysis (after making an allowance for SFT) shows that all the District's comparison goods retailing is achieving a market share of 35.4% across the defined study area. Crawley (28.5%) and Brighton and Hove (19.6%) are the main competing shopping destinations for all comparison goods purchases in the study area, and to a lesser degree Tunbridge Wells (3.0%). As for convenience goods, the 'retention levels' are significantly higher in those zones covered by Haywards Heath (Zones 1 and 3), East Grinstead (Zone 6) and Burgess Hill (Zones 2 and 8) Town Centres; ranging from 50.5% (Zone 6) to 60.1% (Zone 1).

10.12 The challenge for the District's main town centres over the development plan period therefore will be to maintain and strengthen their market shares in the face of strong and growing competition from larger neighbouring centres, competing out-of-centre facilities and the internet. However, this will depend on whether there is sufficient:

- residual expenditure capacity to support modern new retail floorspace in the District and its main centres;
- 'physical' capacity (i.e. suitable and viable sites) in the District's town centres first to accommodate any identified need in full, in accordance with the sequential approach; and
- market interest from operators, landowners and investors to deliver new and viable retail floorspace in the District and its main centres.

10.13 We address these three critical requirements in more detail below based on the key findings of the retail assessment.

RETAIL CAPACITY FORECASTS

10.14 **Section 9** assessed the District-wide capacity for new (convenience and comparison goods) retail floorspace in the study area over the development plan period. The '*baseline*' capacity assessment is underpinned by robust evidence and forecasts, including:

- the latest forecast growth rates for retail expenditure, Special Forms of Trading (SFT) and floorspace 'productivity' informed by the latest *Retail Planner Briefing Note* published by Experian Business Strategies (EBS);
- the market share analysis of shopping patterns for different types of retail (convenience and comparison goods) purchases derived from the telephone interview survey (after making an allowance for Special Forms of Trading); and
- the latest ONS-based population projections for the local authority area and wider Study Area, and the broad distribution of this population growth on a zone-by-zone basis, as agreed with Mid Sussex District Council.

10.15 Based on the key baseline assumptions that the retail market is in '*equilibrium*' at the base year (2014) and that market shares remain constant over the study period, the table below summarises the District-wide capacity for new retail (convenience and comparison goods) floorspace over the plan period, up to 2031.

Table 10.1 **District-Wide Capacity Forecasts:**
Assuming 'Equilibrium' at 2014 & Constant Market Shares

	2014	2019	2024	2029	2031
CONVENIENCE GOODS:					
Residual Expenditure (£m):	£0.0	-£19.7	£0.3	£21.7	£30.1
Floorspace Capacity (m^2 net) [(1)]:	**-**	**-1,626**	**26**	**1,784**	**2,475**

	2014	2019	2024	2029	2031
COMPARISON GOODS:					
Residual Expenditure (£m):	£0.0	£0.7	£32.4	£84.0	£109.7
Floorspace Capacity (m^2 net):	**-**	**117**	**4,707**	**10,950**	**13,689**

Source: Tables 12, Appendices 7 & 8 (Steps 10 & 11)
Notes: (1) The capacity identified is for new superstore-format floorspace trading at a higher average sales density than for supermarkets (e.g. Co-Op, Budgens, etc.) and deep discounters (e.g. Lidl and Aldi).

10.16 The headline forecasts show that for:

- **Convenience goods** - there is no District-wide capacity for new (superstore format) retail floorspace until 2024 (26m^2 net), as any expenditure growth will largely be taken up by the Waitrose store permitted as part of the station redevelopment in Haywards Heath (Local Authority Reference: 12/02935/FUL). Towards the end of the development plan period, there is forecast capacity for 1,784m^2 net of new retail floorspace, increasing to 2,475m^2 net by 2024.
- **Comparison goods** - there is limited capacity of 117m^2 net by 2019, although this is forecast to increase to 10,950m^2 by 2029 and to 13,689m^2 by 2031.

10.17 The capacity forecasts have then been disaggregated for the main town and village centres to help identify the potential strategic allocation of new retail floorspace over the development plan period. The results are summarised in Table 10.2 below.

10.18 It is important to restate that capacity forecasts beyond 5 years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending levels, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current Experian forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term.

Table 10.2 **Capacity Forecasts for the Main Town & Village Centres:**
Assuming 'Equilibrium' at 2014 & Constant Market Shares

	2014	2019	2024	2029	2031
HAYWARDS HEATH:					
Convenience Capacity (m^2 net):	-	-2,326	-1,870	-1,385	-1,195
Comparison Capacity (m^2 net):	-	-253	1,036	2,789	3,558
BURGESS HILL:					
Convenience Capacity (m^2 net) :	-	470	1,015	1,595	1,822
Comparison Capacity (m^2 net):	-	188	1,868	4,153	5,156
EAST GRINSTEAD:					
Convenience Capacity (m^2 net) :	-	187	732	1,311	1,538
Comparison Capacity (m^2 net):	-	163	1,617	3,595	4,463

	2014	2019	2024	2029	2031
HASSOCKS/HURSTPIERPOINT:					
Convenience Capacity (m^2 net) :	-	42	148	260	305
Comparison Capacity (m^2 net):	-	19	186	413	512

Source: Tables 13-16, Appendices 7 & 8 (Steps 10 & 11)

10.19 The following provides a high level review of the relative health, role and function of the District's main centres, and their potential to accommodate some and/or all of the identified need over the short, medium and long term.

MEETING NEEDS IN THE DISTRICT'S MAIN CENTRES

10.20 The review of the performance of the District's three main town centres in retail terms has been informed by the findings of the health checks, centre audits and household survey. It has also taken into account the current policy framework and strategic visions for each centre, including the emerging Neighbourhood Plans, as well as the latest information on existing, proposed and emerging new retail-led development and investment in the main centres.

Burgess Hill Town Centre

10.21 Burgess Hill is located to the south of the District and has 204 outlets trading from a total estimated (Experian Goad) retail and service floorspace of 35,461m^2. It is slightly smaller in scale than East Grinstead (38,722m^2), but larger than Haywards Heath (33,807m^2). The centre's main retail offer is concentrated in The Martlets and Market Place shopping centres, and other key shopping streets include Church Walk, Church Road and Station Road.

10.22 The following provides a brief summary of the centre's overall vitality and viability based on a number of the key retail performance indicators (KPIs) assessed in Section 5 of the retail study:

- The number of comparison goods outlets has fallen from 86 in 2008 to 58 in 2014, and current provision is below the national average.
- There is an under-provision of clothing and fashion shops in the town centre, and an under-representation of larger anchor variety and department stores.
- The extension to the Waitrose store in Market Place in 2013 has strengthened the town's overall food offer, trading alongside other national multiples (including Lidl and Iceland), smaller independents and the market.
- Vacancy levels have increased from 4.7% (10 outlets) in 2008 to 13.2% (27 outlets), and are currently above the (Experian Goad) national average figure of 11.5%.

- The centre has experienced falling requirements from retailers and leisure service operators for representation in the town centre since 2007/08. Although this reflects national trends (including the impact of the economic downturn and the growth of online retailing on market demand), requirements for Burgess Hill are lower than recorded by CoStar for East Grinstead and Haywards Heath.
- Based on the latest market evidence, Prime Zone A rents achieved on Church Road of circa £430 per m^2 are lower than the levels achieved in Haywards Heath (£579 per m^2) and East Grinstead (£538 per m^2).
- Rental levels have also fallen back from £484 per m^2 identified in 2007/08, although the decline of 11% has not been as steep as for Haywards Heath (-23%) and East Grinstead (-29%).
- Declining visitor numbers, with people visiting the centre less frequently than had been the case in 2008, and a higher proportion who did not visit the centre at all.
- Respondents to the household survey liked the fact that Burgess Hill is close to where they live and/or work, is attractive and compact, and has a good range of non-food shops.
- When asked what improvements to the centre would make them visit more often, respondents identified the need for better public transport and improvements to the overall environment.

10.23 Although there are gaps and weaknesses in Burgess Hill's retail offer, the recent extension to the Waitrose on Market Place in 2013 is a positive sign of improving business and investment confidence in the town centre following the impact of the economic downturn. This is further underlined by the emerging proposals by the owners of both The Martlets and Market Place shopping centres seeking to revitalise and extend their existing retail and leisure offer in the town centre. Although neither scheme was subject to a planning application at the time of finalising this study, we understand that the indicative proposals for the phased redevelopment of The Martlets by NewRiver Retail include the proposed relocation of Lidl to a new town centre site in order to facilitate new Class A1 and A3 floorspace (of over 6,000m^2 gross), a new (Class D2) cinema (of circa 3,250m^2), a (Class C1) hotel, a new library and community facilities, new residential units and public realm improvements, including the creation of a new public square.

10.24 We therefore conclude that the emerging proposals for The Martlets and Market Place shopping centres should help to meet the forecast need for new retail floorspace in Burgess Hill over the plan period. This is in compliance with the local and national planning policy (NPPF, paragraph 23) and the main objectives of the *Burgess Hill Town Wide Strategy* to promote new development and investment in the town centre first to ensure the vitality and viability of its daytime and evening economy.

10.25 It is against this background that we have reviewed the current designations of the primary and secondary shopping frontages set out in the adopted Local Plan Proposals Map (Inset 31).

- **Primary Shopping Frontages (PSFs)** – The proposed improvements to The Martlets and Market Place shopping centres will help to strengthen the town's retail offer and retail (pedestrian) circuit. The new investment should generate higher levels of footfall within and between the two shopping centres, as well as along the main pedestrianised shopping street (i.e. Church Walk). For this reason we see no reason to change the defined PSFs at this stage[34].
- **Secondary Shopping Frontages (SSFs)** – In our judgement the current definition of SSFs along Church Road and Station Road are appropriate as they allow for greater flexibility in uses. However we do not consider there is a need to retain the SSF definition that currently covers Junction Road.

10.26 In accordance with the NPPF and NPPG the Council will also need to define the town's Primary Shopping Area (PSA). This is the area where retail development is concentrated and generally comprises PSFs and those SSFs that are adjoining and closely related to the PSF. At this stage we advise that the PSA should include all the defined PSFs (and any proposed extension to the two main shopping centres); and should be extended to include the SSFs at the northern end of Church Walk and along Church Road and Station Road, to the north of the railway station.

East Grinstead

10.27 East Grinstead is located to the north of the District and is the largest centre in Mid Sussex measured in terms of its retail and service (Experian Goad) floorspace (38,722m^2) and outlets (222). Its main shopping, leisure and service provision is focused around its historic core, although this also places a constraint on new development.

10.28 The town's Primary Shopping Frontages run along London Road and also include Queens Walk Shopping Precinct and the upper section of Railway Approach (which links to the northern end of London Road). Secondary Frontages comprise the High Street and the sections of West Street and Ship Street which approach the roundabout with High Street.

10.29 The following provides a brief summary of the centre's overall vitality and viability based on a number of the key retail performance indicators (KPIs) assessed in Section 6 of the retail study:

- The centre faces strong and increasing competition from neighbouring centres, principally Crawley which has a particularly strong retail and leisure offer and is easily accessible from the centre.

[34] Notwithstanding this, we advise that the Council will need to take into account any new frontages and pedestrian routes that could be created by the proposed redevelopment of The Martlets and Market Place when deciding on the appropriate definition of the primary and secondary frontages.

- The centre has a relatively good provision of comparison goods outlets and floorspace compared with the (Experian Goad) national average.
- There is an under-representation of national multiple retailers, particularly fashion and footwear retailers.
- Although the centre has a below average provision of convenience goods retail outlets and floorspace, its main food offer is anchored by Waitrose which helps to generate linked trips, footfall and expenditure to the benefit of other shops, businesses and facilities in East Grinstead. The Iceland in Queens Walk and Aldi store at the northern end of London Road complement Waitrose's offer, and help to strengthen the town's overall food and convenience offer.
- The town's vacancy level is below the national (Experian Goad) average of 11.5%. Vacancy levels have remained relatively stable at around 19 units since 2008.
- The highest concentration of vacant units recorded by SP in September 2014 were on London Road, at the end of the road furthest from the junction with the High Street, where footfall is generally lower and the units are less well maintained.
- There were seven recorded requirements from retailers and leisure operators for representation in the town centre in 2014, down from 34 in 2007/08. This mirrors national trends, and places East Grinstead ahead of Burgess Hill but behind Haywards Heath.
- Prime Zone A rents are currently estimated to be around £538 per m^2, which represents a 29% fall from the levels achieved before the economic downturn (£753 per m^2). Rents achieved at the northern end of London Road are lower, at around £430 per m^2, although this is encouraging the take up of vacant units in this area.
- The lower quality of the urban environment along some of the primary frontages, such as Queens Walk and the northern end of London Road.
- The restrictions placed on Atrium Leisure complex due to its location in a residential area, which prevent it from contributing fully to a vibrant night time economy.
- Respondents to the household survey liked the fact that East Grinstead is close to where the live and/or work, and is attractive and compact.
- When asked what improvements to the centre would make them visit more often, respondents identified the need for more and better comparison goods retailers, and specifically clothing and footwear shops; more national multiple retailers; and more and cheaper/free car parking

10.30 There are emerging proposals for future investment and development in the centre in line with those set out in the Town Centre Masterplan and Draft Local Plan. The main proposals include the refurbishment of Queens Walk and the redevelopment of Railway Approach. At the time of finalising this study plans for the extensive redevelopment of Queens Walk were being prepared by the Council and Frontier Estates. The indicative plans for Queens Walk show a scheme that builds on the SPD and aims to reinforce the linkage from London Road to the Library. We understand that the scheme could provide circa 1,858m^2 of new food retail floorspace and 1,207m^2 of Class A1 comparison goods retail. The emerging proposals also include the creation of a new public square at West Street, additional car parking and opportunities for public art. Together with the proposed redevelopment of Railway Approach we consider that the emerging schemes should be capable of meeting all the identified need for new retail floorspace in the town centre over the plan period.

10.31 It is against this background that we have reviewed the current designations of the primary and secondary shopping frontages set out in the adopted Local Plan Proposals Map (Inset 33). In general terms we consider that the current definitions are appropriate based on the mix of uses on London Road and High Street, rental values and pedestrian footfall. In our view the only potential change would be to reduce the extent of the defined primary frontages to the north of London Road (from 117 London Road to the junction with Beeching Way) and along Railway Approach. In our judgement these areas should be redefined as SSFs to allow more flexible uses in the future. However, account will have to be taken in the future of the potential need to extend the SSF to include the future proposed redevelopment of Railway Approach, subject to the scale of development and the mix of retail and leisure uses proposed.

10.32 In terms of the definition of a Primary Shopping Area (PSA), we advise that this should include the current primary and secondary frontages, along with any planned extension to the Queens Walk shopping area, as well as the cinema and other commercial leisure uses on King Street. Any definition of the PSA should also take into account the planned redevelopment of Railway Approach.

Haywards Heath

10.33 Haywards Heath is located in the centre of the District, to the north of Burgess Hill and south of East Grinstead. With a total (Goad) floorspace of 33,807m^2, it is marginally smaller than the District's other two main centres.

10.34 The town's primary shopping frontage is focussed on South Road, which serves as the main shopping street in the town. The centre's retail offer is anchored by the Orchards Shopping Centre off South Road, which accommodates a number of major national multiples (including Marks & Spencer and Next). There are secondary shopping areas to the south of South Road on Sussex Road and also to the north along the Broadway.

10.35 There has been limited new investment in the town's retail offer for a number of years, but the planned redevelopment of the railway station to include a new Waitrose store with a Gross Internal Area (GIA) of 4,122m^2 will significantly strengthen the town's retail offer, as well as providing more car parking spaces to the benefit of the town centre as a whole.

10.36 The following provides a brief summary of the centre's overall vitality and viability based on a number of the key retail performance indicators (KPIs) assessed in Section 7 of the retail study:

- The provision of convenience goods outlets and floorspace is below the national average, and the number of outlets has fallen from 20 in 2018 to 17 in 2014.
- However the scale and quality of the town's food and convenience provision will be strengthened by the planned opening of a new Waitrose store as part of the wider Haywards Heath Railway Station redevelopment.
- Although the number of comparison goods outlets has also fallen by some 14% since 2008 (from 104 to 89 outlets), current provision represents over 40% of total outlets and almost 50% of total floorspace, which is above the national (Experian Goad) averages of 32.6% and 32.6% and 36.3% respectively.
- The centre has a good provision of national multiple non-food retailers (including Marks & Spencer, Next and WH Smith), in line with national averages.
- Although the number of vacant units has increased from ten in 2008 to 18 in 2014, vacancy levels measured in terms of outlets (8.1%) and floorspace (7.4%) are below the (Experian Goad) national average figures of 11.5% and 9.3% respectively.
- The centre has relatively good retail service provision, but its leisure service representation is below the national average figure. There may therefore be scope to expand the quality of the town's food and beverage offer.
- The centre has experienced falling requirements from retailers and leisure service operators seeking representation in the town centre from 37 in 2007/08 to eleven record requirements at present. Although this reflects national trends (including the impact of the economic downturn and the growth of online retailing on market demand), requirements for Haywards Heath are higher than recorded by CoStar for East Grinstead and Burgess Hill.
- Although Prime Zone A rental levels achieved in all of the District's main town centres are lower than recorded in 2007/08, the average rental level for Haywards Heath of circa £579 per m^2 is higher than achieved in Burgess Hill (£430 per m^2) and East Grinstead (£538 per m^2) in 2014.

- Declining visitor numbers, with people visiting the centre less frequently than had been the case in 2008, and a higher proportion who did not visit the centre at all.
- Respondents to the household survey liked the fact that Haywards Heath is close to where they live and/or work, is attractive and compact, and has a good range of non-food shops, including M&S and Next.
- When asked what improvements to the centre would make them visit more often, respondents identified the need for more national multiple retailers and High Street shops, followed by free parking and/or more parking.
- Weaker secondary shopping areas and a declining physical environment along Sussex Rd. There is a need to improve the appeal of the offer here in order to increase the number of visits to the southern end of the town centre.
- Poor connections and circulation between the primary and secondary shopping areas.

10.37 In summary, Haywards Heath is performing well as a non-food shopping location in Mid Sussex. Its food and convenience offer will be significantly strengthened by the opening of a new Waitrose store in 2016 as part of the Railway Station redevelopment. We also understand that the Council has entered into discussions recently with the leaseholders of The Orchards to discuss plans for improvement to the scale and quality of this important shopping location in the heart of the town centre. Although no indicative plans had been drawn up at the time of finalising this study, we nevertheless consider that the emerging proposals for The Orchards and other potential development opportunity sites in the town centre will help to meet the need for new and improved retail and commercial leisure floorspace in Haywards Heath over the plan period in full compliance with the NPPF (paragraph 23).

10.38 It is against this background that we have reviewed the current designations of the primary and secondary shopping frontages set out in the adopted Local Plan Proposals Map (Inset 35). In general terms we consider that the current definition of the PSF is appropriate, although account will need to be taken of any planned extension to The Orchards. In terms of Secondary Shopping Frontages (SSFs) we consider that Sussex Road to the south of the town centre should be retained, although it would benefit from new investment in the shopping environment. The SSF currently defined to the north of South Road and on The Broadway is more problematic as it is separated from the PSF by Victoria Park on one side and St Wilfrids Church on the other. Notwithstanding this, the mix of uses on The Broadway (principally food and beverage uses) are popular and busy, and will form an important link between the planned station redevelopment and the town centre. We therefore advise that the current SSF definition to north of South Road and along The Broadway is retained.

10.39 In terms of the definition of the town's Primary Shopping Area (PSA), we consider that this should extend as far as the SSFs on The Broadway to the north and Sussex Road to the south, and cover all the PSF (including The Orchards). The definition of the PSA will need to be reviewed once the new Waitrose and railway station redevelopment are delivered, but at this stage we do not consider that they can be included in the PSA.

Hassocks and Hurstpierpoint

10.40 Hassocks and Hurstpierpoint have been identified in the Local Plan as the District's two main village centres. These centres perform an important role and function, serving the needs of their own communities and neighbouring smaller villages in the area. They generally offer a range of 'top up' convenience and key services, including post offices, banks, hairdressers and food and drink outlets.

10.41 The following provides a brief summary of their overall vitality and viability based on a number of the key retail performance indicators (KPIs) assessed in Section 8 of the retail study:

- Since 2005 the level of service provision has increased in both centres. This has led to a better provision of essential services in some cases, such as the introduction of a bank in Hurstpierpoint since the 2005 survey was conducted.
- The food and convenience provision in both centres is generally good and is anchored by at least one small to medium sized anchor convenience store – Budgens in Hassocks and a Co-Op in Hurstpierpont. Each centre's food and convenience offer is supplemented by more specialist independent businesses.
- The food and convenience offer in Hassocks is set to benefit from the opening of a new Sainsbury's Local store.
- The comparison offer in both centres is limited, which reflects their role and function in the District's network and hierarchy of centres.
- There was just one vacant unit in Hurstpierpoint at the time of SP's audit and two in Hassocks (although one of these vacant units was being redeveloped for a Sainsbury's Local).
- The shopping environment in both centres was good, although some of the shopping parades in Hassocks are starting to appear somewhat dated and in our view would benefit from investment.
- Parking and access was good in Hassocks. Traffic calming measures have had to be put in place in Hurstpierpoint to help mitigate the negative effects of heavy congestion, but there are signs that it still continues to suffer congestion problems due to a lack of parking provision and narrow road and pavement layouts.

10.42 In summary the updated audits for both centres found that they are performing relatively well. We consider that the more limited forecast capacity for new convenience (305m^2 net) and comparison (512m^2 net) retail floorspace over the plan period can and should be met through new development and infill opportunities in these smaller centres in compliance with the NPPF (paragraph 23). The main opportunity for new development will be in Hassocks, as the historic character of Hurstpierpoint and the designation of the town centre as a Conservation Area will limit the potential for future floorspace expansion.

10.43 In the context of the NPPF we advise the Council that they should define Primary Shopping Areas (PSAs) for Hassocks and Hurstpierpoint, as well as the District's other main village centres. The Council should be aware that if a PSA is not defined for the village centres, then there is a risk in planning policy terms that they may not be defined as 'centres' in accordance with the NPPF and may not therefore be subject to the sequential and impact tests (NPPF, paragraphs 24-27).

IMPACT ASSESSMENT: LOCAL FLOORSPSPACE THRESHOLD

10.44 Finally, we have reviewed whether there is a policy requirement for the local planning authority to set a local floorspace threshold rather than use the default threshold of 2,500m^2 identified by the NPPF (paragraph 26) above which applicants are required to carry out an impact assessment for new retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan.

10.45 The *National Planning Practice Guidance* (NPPG) published in March 2014 provides helpful advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

10.46 In general terms national retailers seeking larger format comparison goods shop units in town centre and out-of-centre locations usually have requirements for floorspace of 500m^2 and above. Larger format stores over 500m^2 gross are also unlikely to be a purely local facility and will tend to draw trade from outside of their immediate local catchment[35]. As a result it is unlikely that standalone out-of-centre stores and shopping destinations (e.g. retail units in retail parks) will seek floorspace below this threshold, as their 'business models' and competitive advantage is largely predicated upon trading from larger format retail units and drawing customers from wider catchment areas. We therefore conclude it is reasonable for applicants proposing

35 According to the Sunday Trading laws a 'large shop' is defined as being over 280m^2 gross. This provides a broad indication at the national level as to what constitutes a 'large shop' capable of generating a reasonable amount of trade (and, therefore, the potential to result in an impact on shopping patterns).

developments for new comparison goods floorspace of 500m^2 gross and above to demonstrate that they will not have a significant adverse impact on town centres, either on their own or cumulatively with other commitments in the area.

10.47 We also consider that there is justification in this case for a local impact threshold of 500m^2 gross for convenience goods floorspace proposals on the edge of or outside of the District's main town centres. In our judgement this is a reasonable threshold as it will enable the local planning authority to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres.

10.48 Notwithstanding this, the Council will be aware that smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.) can fall below the 500m^2 gross threshold. In circumstances where these smaller stores are proposed on the edge or outside of smaller district, local and village centres, they could have a significant impact on their trading performance, and overall vitality and viability, particularly on those centres that are highly dependent on convenience ('top-up') shopping as an anchor to their retail offer to help generate footfall and linked trips/expenditure to other shops, services and facilities. Notwithstanding this, we consider that setting a floorspace threshold below 500m^2 gross could potentially be too inflexible and restrictive, although we advise the Council to carefully monitor and assess the impacts of proposals for smaller convenience stores in the Borough on a case-by-case basis, specifically

10.49 Finally it is important that the scope of any Retail Impact Assessment (RIA) in support of planning application is discussed and agreed between the applicant and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate with the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis.

GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.

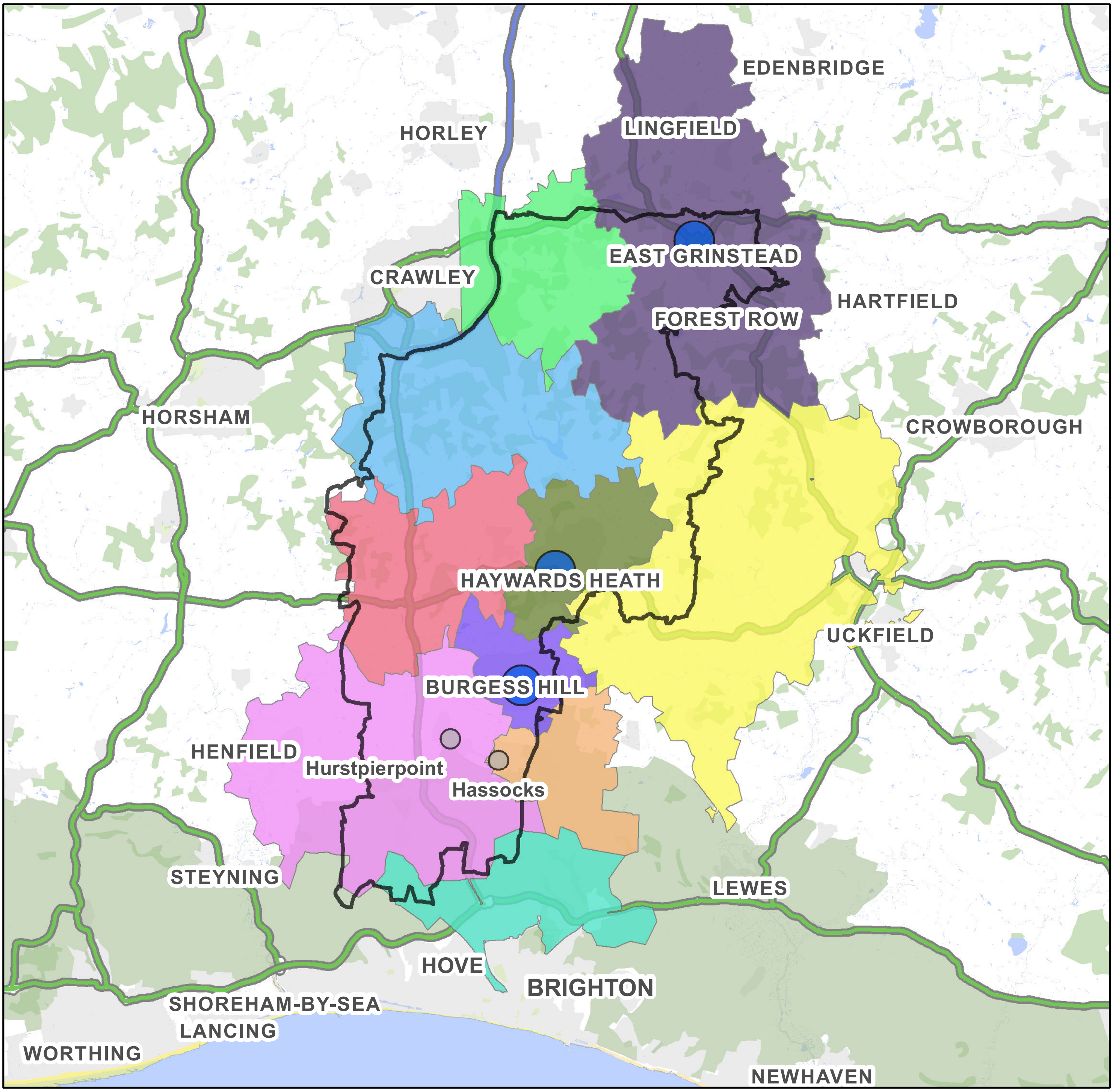
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY') GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.

OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, the NPPG advises that such turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

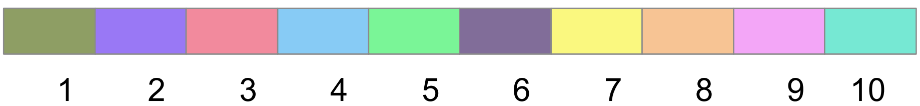
– END –

1

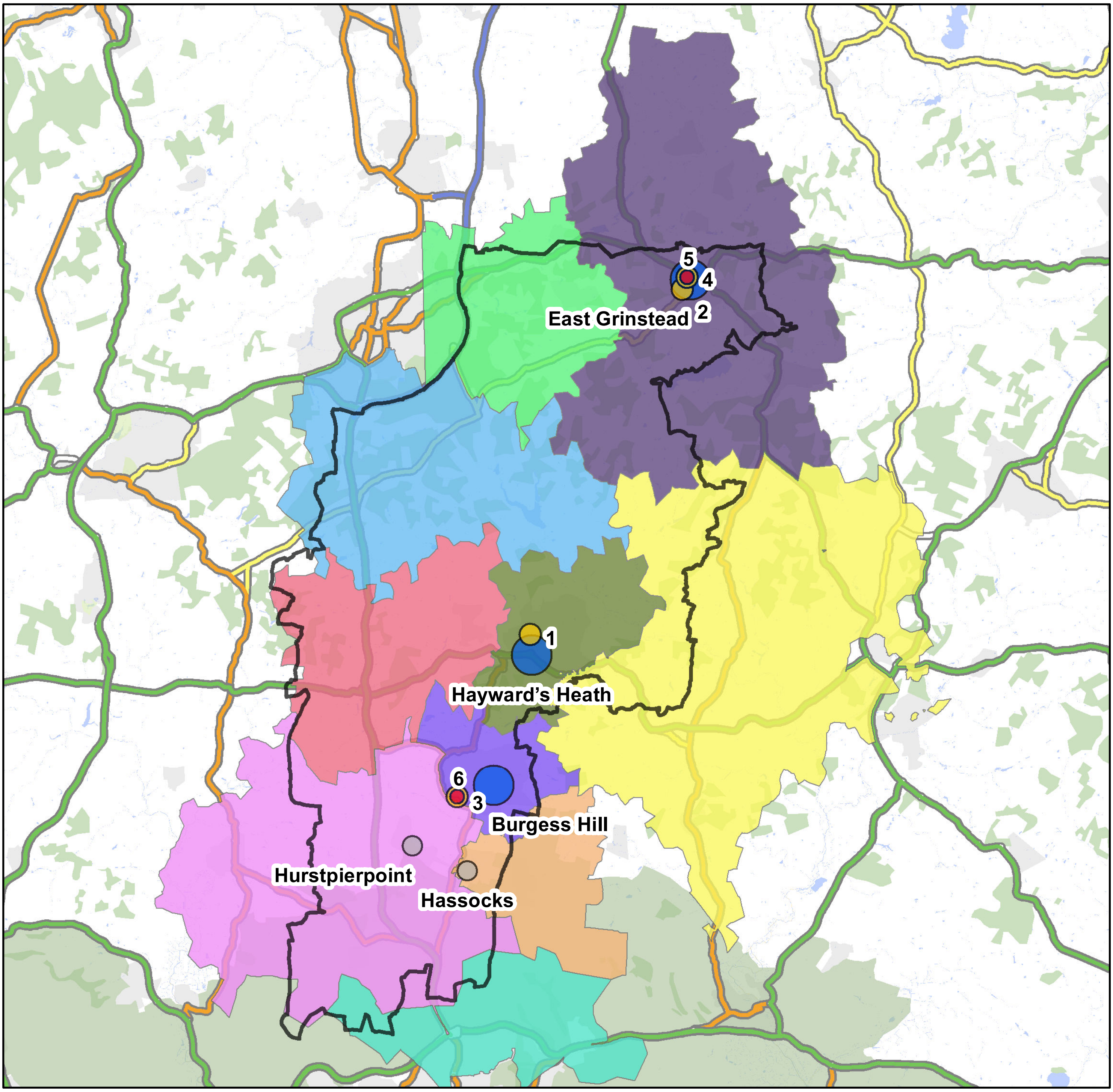
Mid Sussex Zones Plan



Zones



Mid Sussex Retail Provision



Key

Out of centre foodstores

1. Sainsbury's, Banister Way, Haywards Heath
2. Sainsbury's, Brooklands Way, East Grinstead
3. Tesco, Jane Murray Way, Burgess Hill
4. Aldi, London Road, East Grinstead

Out of centre non-food

5. London Road, East Grinstead: Majestc W nes, Carpetright, Halfords, Wickes
6. Victoria Business Park, Jane Murray Way: B&Q, Homebase, Pets at Home.
   London Road Burgess Hill: Wickes, Halfords, Carpetright

Out of centre foodstores

Out of centre non-food

Town Centres

East Grinstead Town Centre: Waitrose, Iceland (Queens Walk)
Burgess Hill Town Centre: Lidl (The Martlets), Waitrose (West Street), Iceland (the Martlets), Co-Op (the Martlets)
Haywards Heath Town Centre: Marks & Spencer, Tesco Express (Orchards Shopping Centre), Iceland (Haywards Road)

2

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Mid Sussex Household Survey
for
Planning Perspectives

August 2014

Job Ref: 100814

Table of Contents

Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Mid Sussex area to assess shopping habits for main food and grocery, top-up, non-food shopping and leisure activities.

1.2 Research Methodology

A total of 1007 telephone interviews were conducted between Monday 4th August 2014 and Thursday 14th August 2014. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 10 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1	RH16 1, RH16 2, RH16 3, RH16 4	101
2	RH15 8, RH15 9, RH15 0	101
3	RH17 5	102
4	RH10 5, RH11 9, RH17 6	100
5	RH10 3, RH10 4, RH10 7	100
6	RH18 5, RH19 1, RH19 2, RH19 3, RH19 4	101
7	BN8 4, RH17 7, TN22 3	100
8	BN6 8	100
9	BN5 9, BN6 9	101
10	BN1 5, BN1 8, BN45 7	101
Total		**1007**

1.3.2 Telephone Numbers

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers (land-lines and some mobile numbers) but is supplemented with ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers sample. Ex-directory numbers are randomly generated using the published numbers as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

1.3.3 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main-shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next random selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-24	4.36%	26	1.6506
25-34	15.43%	29	5.2918
35-44	18.90%	143	1.3033
45-54	18.80%	215	0.8505
55-64	18.40%	195	0.9207
65+	24.10%	371	0.6268
(Refused)	n/a	28	1.0000
Total		**1007**	

Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	33550	101	103	1.3668
2	31545	101	137	0.9662
3	6813	102	92	0.3108
4	26081	100	107	1.0228
5	36829	100	116	1.3323
6	37932	101	113	1.4086
7	17172	100	89	0.8096
8	8684	100	88	0.4141
9	15822	101	80	0.8299
10	25308	101	81	1.3111
Total	**239736**	**1007**		

* Source: Census 2011

1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

For example, if 50% of a sample of 1007 answers "Yes" to a question, we can be 95% sure that between 46.9% and 53.1% of the population holds the same opinion (i.e. +/- 3.1%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±1.9%
20%	±2.5%
30%	±2.8%
40%	±3.0%
50%	±3.1%

1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

Appendix:

Sample Questionnaire

Job No. 100814

Mid Sussex Household Survey

Good morning / afternoon / evening, I am …… from NEMS Market Research and we are conducting a short survey in your area about shopping and leisure activities, on behalf on Mid Sussex District Council. Do you have time to answer some questions please? It will take about five minutes.

QA Are you the person responsible for main food shopping in your household?

YES – CONTINUE INTERVIEW.
NO – ASK TO SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE HOUSEHOLD'S SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW.

Q01 In which store or shopping centre do you normally shop at for all your household's main food and grocery shopping needs (i.e. primarily bulk 'trolley' purchases)?
DO NOT READ OUT. ONE ANSWER ONLY. INTERVIEWER INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS.

#Food	Food list	
135	Internet / mail order (PLEASE WRITE IN)	**GOTO Q03**
136	(Don't know / varies)	
137	(Don't do this type of shopping)	**GO TO CLOSE**

Excluding those who shop via 'Internet / mail order' at Q01

Q02 How do you normally travel to (STORE MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY.

1	Car / van (as driver)
2	Car / van (as passenger)
3	Bus, minibus or coach
4	Using park & ride facility
5	Motorcycle, scooter or moped
6	Walk
7	Taxi
8	Train
9	Bicycle
A	Mobility scooter / wheelchair
B	Other (PLEASE WRITE IN)
C	(Don't know / varies)

Q03 In addition to (STORE MENTIONED AT Q01), is there any other store that you regularly use for your main-food shopping?
DO NOT READ OUT. CAN BE MULTICODED. INTERVIEWER - INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS.

#Food	Food list
135	Internet / mail order (PLEASE WRITE IN)
136	(Don't know / varies)
137	(Nowhere else)

Excluding those who shop via 'Internet / mail order' at Q01:

Q04 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)?
DO NOT READ OUT. CAN BE MULTICODED. PROBE FULLY. Anywhere else?

1	Yes - non-food shopping	GOTO Q05
2	Yes - other food shopping	GOTO Q05
3	Yes - bars/pubs	GOTO Q05
4	Yes - bingo	GOTO Q05
5	Yes - cafes	GOTO Q05
6	Yes - cinemas	GOTO Q05
7	Yes - get petrol	GOTO Q05
8	Yes - go to park	GOTO Q05
9	Yes - gyms/ health and fitness	GOTO Q05
A	Yes - library	GOTO Q05
B	Yes - markets	GOTO Q05
C	Yes - meeting family	GOTO Q05
D	Yes - meeting friends	GOTO Q05
E	Yes - museums/ art gallery	GOTO Q05
F	Yes - other service (travel agent, estate agent)	GOTO Q05
G	Yes - personal service (hairdressers, beauty salon)	GOTO Q05
H	Yes - restaurants	GOTO Q05
I	Yes - swimming	GOTO Q05
J	Yes - theatre	GOTO Q05
K	Yes - visiting services such as banks and other financial institutions	GOTO Q05
L	Yes - work	GOTO Q05
M	Yes - other (PLEASE WRITE IN)	GOTO Q05
N	No	**GOTO Q07**
O	(Don't know)	**GOTO Q07**

Those who combine their main food shopping trip with other activities at Q04:

Q05 When you combine your trip with other activities, where do you normally go?
DO NOT READ OUT. CAN BE MULTICODED. PROBE FULLY. Anywhere else?

#Link Linked Trips List

Excluding those who combine their shopping trip with other activities in Burgess Hill, East Grinstead or Haywards Heath at Q05:

Q06 What do you like about this store / town centre?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing / very little
2 Attractive environment / nice place
3 Close to friends or relatives
4 Close to home
5 Close to work
6 Compact
7 Easy to get to by bike
8 Easy to get to by bus
9 Easy to get to by car
A Easy to park
B Good facilities
C Good food stores
D Good pubs, cafés or restaurants
E Good range of non-food shops
F Makes a change from other places
G Quiet
H Safe and secure
I The market
J Traditional
K Traffic free shopping centre
L Other (PLEASE WRITE IN)
M A specific shop (PLEASE WRITE IN)
N A specific attraction (PLEASE WRITE IN)
O (Don't know)

Q07 In addition to your main food shopping, where do you do most of your household's small scale 'top-up' food shopping (i.e. the store you visit regularly (2+ times a week to buy bread, milk, etc., on a day-to-day basis)?
DO NOT READ OUT. ONE ANSWER ONLY. INTERVIEWER - INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS.

#Food Food List
135 Internet / mail order (PLEASE WRITE IN)
136 (Don't know / varies)
137 (Don't do top-up shopping) **GO TO Q09**

Those who do top-up shopping at Q07:

Q08 Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping?
DO NOT READ OUT. PLEASE WRITE IN TO THE NEAREST WHOLE %

1 % (PLEASE WRITE IN)
2 (Don't know)
3 (Refused)

Q09 I would now like to ask you some questions about your non-food shopping habits / preferences - In which ONE town centre, freestanding store or retail park do you do most of your household's shopping for mens, womens, childrens and baby clothing and footwear (fashion items - not sports clothing and footwear)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List GO TO Q10
071 Internet / catalogue (PLEASE WRITE IN) **GO TO Q11**
072 (Don't know) **GO TO Q11**
073 (Don't do this type of shopping) **GO TO Q11**

Excluding those who shop via 'Internet / mail order' at Q09:

Q10 How do you normally travel to (STORE OR CENTRE MENTIONED AT Q09)?
DO NOT READ OUT. ONE ANSWER ONLY

1 Car / van (as driver)
2 Car / van (as passenger)
3 Bus, minibus or coach
4 Using park & ride facility
5 Motorcycle, scooter or moped
6 Walk
7 Taxi
8 Train
9 Bicycle
A Mobility scooter / wheelchair
B Other (PLEASE WRITE IN)
C (Don't know)

Q11 Where do you normally do most of your household's shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (Excluding video games)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q12

Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, kindles, ipads, telephones, etc.)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q13 Where do you normally do most of your household's shopping for all other domestic electrical goods including small domestic electrical appliances (such as irons, kettles, fans, coffee makers, food mixers) and white goods (fridges, freezers, dishwashers) and smaller etc)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q14 Where do you normally do most of your household's shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q15 Where do you normally do most of your household’s shopping for games & toys; pets and pet products; hobby items; sport equipment and camping goods; bicycles; and musical instruments?

DO NOT READ OUT. ONE ANSWER ONLY.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q16 Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q17 Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q18 Where do you normally do most of your household's shopping on all goods for personal care, including electric appliances (e.g. electric razors, hair dryers, curling tongs, electric toothbrishes), non-electric appliances (e.g. scissors, hand razors, bathroom scales), cosmetics, perfume, toothpaste, aftershave, sun tan lotions, etc.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q19 Where do you normally do most of your household's shopping for medical goods (e.g. drugs, medicine), other pharmaceutical products (e.g. vitamins, plasters, thermometers, bandages, syringes); and therapeutic appliances/equipment (e.g. spectacles, contact lenses, hearing aids, wheelchairs, etc.).
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Non Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q20 Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. trael goods, suitcases, prams, sunglasses);
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#Nonf Non-Food List
071 Internet / catalogue (PLEASE WRITE IN)
072 (Don't know)
073 (Don't do this type of shopping)

Q21 On which day of the week do you typically do your shopping?
DO NOT READ OUT. CODE ALL THAT APPLY.

1 Monday
2 Tuesday
3 Wednesday
4 Thursday
5 Friday
6 Saturday
7 Sunday
8 (Don't know)

Q22 How often do you or your household visit East Grinstead for your non food shopping?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Daily
2 4-6 days a week
3 2-3 days a week
4 One days a week
5 Every two weeks
6 Monthly
7 Once every two months
8 Three-four times a year
9 Once a year
A Less Often
B Never **GO TO Q24**
C (Don't know / varies)

Those who visit East Grinstead at Q22:

Q23 What do you like about East Grinstead?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing / very little
2 Attractive environment / nice place
3 Close to friends or relatives
4 Close to home
5 Close to work
6 Compact
7 Easy to get to by bike
8 Easy to get to by bus
9 Easy to get to by car
A Easy to park
B Good facilities
C Good food stores
D Good pubs, cafés or restaurants
E Good range of non-food shops
F Makes a change from other places
G Other particular shops or stores
H Quiet
I Safe and secure
J The market
K Traditional
L Traffic-free shopping centre
M Other (PLEASE WRITE IN)
N A specific shop (PLEASE WRITE IN)
O A specific attraction (PLEASE WRITE IN)
P (Don't know / nothing in particular)

Q24 What could be improved about East Grinstead that would make you visit more often?
DO NOT READ OUT. MARK UP TO THREE RESPONSES ONLY

1 Nothing
2 Better access by road
3 Better public transport
4 Better signposting
5 Cleaner streets
6 Facilities which would assist you if shopping with children
7 Free car parking
8 Jewellery / food markets / other events
9 More / better comparison retailers (i.e. non-food shops)
A More / better entertainment / eating places
B More / better food shops
C More / better parking
D More / better pedestriansied streets
E More / better public conveniences
F More / better seats / flower displays
G More / better services
H More advertising
I More national multiple shops / High Street shops
J Protection from the weather (ie. Covered shopping malls)
K Shops / services open on Sundays
L Other (PLEASE WRITE IN)
M (Don't know)

Q25 How often do you or your household visit Haywards Heath for your non-food shopping?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Daily
2 4-6 days a week
3 2-3 days a week
4 One days a week
5 Every two weeks
6 Monthly
7 Once every two months
8 Three-four times a year
9 Once a year
A Less Often
B Never **GO TO Q27**
C (Don't know)

Those who visit Haywards Heath at Q25:

Q26 What do you like about Haywards Heath?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing / very little
2 Attractive environment / nice place
3 Close to friends or relatives
4 Close to home
5 Close to work
6 Compact
7 Easy to get to by bike
8 Easy to get to by bus
9 Easy to get to by car
A Easy to park
B Good facilities
C Good food stores
D Good pubs, cafés or restaurants
E Good range of non-food shops
F Makes a change from other places
G Quiet
H Safe and secure
I The market
J Traditional
K Traffic free shopping centre
L Other (PLEASE WRITE IN)
M A specific shop (PLEASE WRITE IN)
N A specific attraction (PLEASE WRITE IN)
O (Don't know)

Q27 What could be improved about Haywards Heath that would make you visit more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing
2 More / better parking
3 Free car parking
4 Better public transport
5 More / better comparison retailers (i.e. non-food shops)
6 More / better food shops
7 More national multiple shops / High Street shops
8 Jewellery / food markets / other events
9 Facilities which would assist you if shopping with children
A Protection from the weather (ie. Covered shopping malls)
B Cleaner streets
C More / better pedestrianized streets
D More / better services
E More / better public conveniences
F More / better entertainment / eating places
G More / better seats / flower displays
H Shops / services open on Sundays
I Better signposting
J Better access by road
K More advertising
L Other (PLEASE WRITE IN)
M (Don't know)

Q28 How often do you or your household visit Burgess Hill for your non-food shopping?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Daily
2 4-6 days a week
3 2-3 days a week
4 One days a week
5 Every two weeks
6 Monthly
7 Once every two months
8 Three-four times a year
9 Once a year
A Less Often
B Never **GO TO Q30**
C (Don't know)

Those who visit Burgess Hill at Q28:

Q29 What do you like about Burgess Hill?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing / very little
2 Attractive environment / nice place
3 Close to friends or relatives
4 Close to home
5 Close to work
6 Compact
7 Easy to get to by bike
8 Easy to get to by bus
9 Easy to get to by car
A Easy to park
B Good facilities
C Good food stores
D Good pubs, cafés or restaurants
E Good range of non-food shops
F Makes a change from other places
G Quiet
H Safe and secure
I The market
J Traditional
K Traffic-free shopping centre
L Other (PLEASE WRITE IN)
M A specific shop (PLEASE WRITE IN)
N A specific attraction (PLEASE WRITE IN)
O (Don't know)

Q30 What could be improved about Burgess Hill that would make you visit more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing
2 More / better parking
3 Free car parking
4 Better public transport
5 More / better comparison retailers (i.e. non-food shops)
6 More / better food shops
7 More national multiple shops / High Street shops
8 Jewellery/ food markets/ other events
9 Facilities which would assist you if shopping with children
A Protection from the weather (ie. Covered shopping malls)
B Cleaner streets
C More / better pedestrianized streets
D More / better services
E More / better public conveniences
F More / better entertainment / eating places
G More / better seats / flower displays
H Shops / services open on Sundays
I Better signposting
J Better access by road
K More advertising
L Other (PLEASE WRITE IN)
M (Don't know)

Q31 If shopping with children, are there any facilities which would assist you?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

6 None
1 A drop-in crèche
2 Family parking spaces
3 A specific retailer or café (PLEASE WRITE IN)
4 Other (PLEASE WRITE IN)
7 (Don't shop with children)
5 (Don't know)

Q32 How often do you or your household visit the following leisure attractions?
READ OUT. ONE ANSWER PER ATTRACTION.

Once a week|Once a fortnight|Once a month|Once every two months|Once every six months|Once a year|Don't go|(Don't know / varies)

1	Bingo / casino / bookmaker	GO TO Q33
2	Cinema	GO TO Q34
3	Gym / health club / sports facility	GO TO Q35
4	Theatre/ concert / music venue	GO TO Q36
5	Museum / gallery or place of historical / cultural interest	GO TO Q37
6	Pub/ bar / nightclub	GO TO Q38
7	Restaurant / café	GO TO Q39
8	Family entertainment (e.g. tenpin bowling, skating rink)	GO TO Q40
9	Other activity (PLEASE WRITE IN)	GO TO Q41

Those who visit 'Bingo',' Casino' or 'Bookmaker' facilities at Q32

Q33 **Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?**
DO NOT READ OUT. ONE ANSWER ONLY.
IF 'OTHER' OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Bing Bingo List

Those who visit 'Cinema' at Q32

Q34 **Where do you or members of your household normally go to the cinema?**
DO NOT READ OUT. ONE ANSWER ONLY.
IF 'OTHER' OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Cine Cinema List

Those who visit 'gym / healthclub / sports facility' at Q32

Q35

Where do you or members of your household normally go to use a gym/healthclub/sports facility?
DO NOT READ OUT. ONE ANSWER ONLY.
IF 'OTHER' OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Heal Healthclub List

Those who visit 'the theatre, concerts and / or music venues' at Q32

Q36 **Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Thea Theatre List

Those who visit 'museum, gallery or other place of historical / cultural interest' at Q32

Q37 **Where do you or members of your household normally go to a museum, gallery, or other place of historical/cultural interest?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Leis Leisure List

Those who visit 'pub / bars / nightclub /music venue' at Q32

Q38

Where do you or members of your household normally go to a pub / bar / nightclub / music venue?
DO NOT READ OUT. ONE ANSWER ONLY.

#Leis Leisure List

Those who visit 'restaurants' at Q32

Q39 **Where do you or members of your household normally go to a restaurant?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Leis Leisure List

Those who partake in 'family entertainment' activities at Q32

Q40 **Where do you or members of your household normally go tenpin bowling?**
DO NOT READ OUT. ONE ANSWER ONLY.
IF 'OTHER' OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Bow Bowling List

Those who go to 'other' leisure attractions at Q32

Q41 **Where do you or members of your household normally go for other leisure activities not mentioned?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Leis Leisure List

Q42 What improvements could be made to Mid Sussex's leisure offer that would make you visit / partake in leisure activities more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

1 Nothing
2 A casino
3 A swimming pool
4 A theatre
5 An art house cinema
6 Better cinema provision e.g. new multi-screen
7 Bingo
8 Cheaper prices
9 Improved access by foot and cycle
A Improved public transport
B Improved security / CCTV
C Improved street furniture
D Improvements in the built environment
E More / better car parking
F More / better cultural facilities
G More / better disabled access
H More / better health clubs / gyms
I More / better policing
J More / better public houses
K More / better seats
L More / better signposting and information
M More better parks / green spaces
N More for children
O More local sports & recreation facilities
P More nightclubs
Q More pavement cafes
R More quality restaurants
S More street cleaning
T Provision of public toilets
U Ten-pin bowling
V Other (PLEASE WRITE IN)
W (Don't do leisure activities)
X (Don't know)

EMP Which of the following best describes the chief wage earner of your household's current employment situation?
READ OUT. ONE ANSWER ONLY.

1 Working full time
2 Working part time
3 Unemployed
4 Retired
5 A housewife
6 A student
7 Self employed
8 Sick / disabled
9 Other
A (Refused)

GEN Gender of respondent
DO NOT READ OUT. CODE FROM OBSERVATION.

1 Male
2 Female

AGE Can I just ask, how old are you?
DO NOT READ OUT. ONE ANSWER ONLY

1 18-24
2 25-34
3 35-44
4 45-54
5 55-64
6 65+
7 (Refused)

HOM How many people live in your home including yourself and children?
DO NOT READ OUT. ONE ANSWER ONLY.

1 One
2 Two
3 Three
4 Four
5 Five
6 Six
7 Seven or more
8 (Refused)

ADU How many adults aged 16 years and over, including yourself, live in your household?
DO NOT READ OUT. ONE ANSWER ONLY.

1 One
2 Two
3 Three
4 Four or more
5 (Refused)

CHI How many children aged 15 years and under, live in your household?
DO NOT READ OUT. ONE ANSWER ONLY.

1 None
2 One
3 Two
4 Three
5 Four or more
6 (Refused)

INC Approximately what is your total household income?
DO NOT READ OUT. ONE ANSWER ONLY.

1 £0-£15,000
2 £15,000 - £20,000
3 £21,000 - £30,000
4 £31,000 - £40,000
5 £41,000 - £50,000
6 £51,000 - £60,000
7 £61,000 - £70,000
8 £71,000 - £80,000
9 £81,000 - £90,000
A £91,000 - £100,000
B £100,000 - £150,000
C 151000+
D (Don't know / refused)

CAR How many cars does your household own or have the use of?
DO NOT READ OUT. ONE ANSWER ONLY.

1 None
2 One
3 Two
4 Three or more
5 (Refused)

FUT Would you be willing to be recontacted for future quality control purposes?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Yes
2 No

Thank & close

3

3

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Mid Sussex Household Survey
for
Planning Perspectives

August 2014

Job Ref: 100814

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Data Tables

By Zone – Weighted

Mid Sussex Household Survey
For Planning Perspectives

Q01 In which store or shopping centre do you normally shop at for all your household’s main food and grocery shopping needs (i.e. primarily bulk 'trolley' purchases)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Pegler Way, CRAWLEY	2.4%	24	0.0%	0	0.0%	0	0.0%	0	18.9%	21	0.5%	1	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Supesrtore, Brighton Marina Village, Eastbourne, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Supesrtore, Crowhurst Road, Hollingbury, BRIGHTON	5.1%	52	1.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	2.8%	2	43.4%	46
Budgens, High Street, HENFIELD	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	7	0.0%	0
Budgens, Orion Parade, Keymer Road, HASSOCKS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	5	0.0%	0	0.0%	0
Co-op Group South East, High Street, HEATHFIELD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Hurstpierpoint, HASSOCKS	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Co-op, Middle Village, Bolnore Village, HAYWARDS HEATH	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, CRAWLEY DOWN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Haywards Road, HAYWARDS HEATH	0.4%	5	2.7%	4	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, London Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Iceland, Queens Walk, EAST GRINSTEAD	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, The Martlets, BURGESS HILL	0.9%	9	0.0%	0	5.4%	7	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.5%	1	0.7%	0	0.0%	0	0.0%	0
Lidl, The Martlets, BURGESS HILL	2.4%	24	0.9%	1	14.8%	20	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2	1.9%	1	0.0%	0
Marks & Spencer, Orchards Shopping Centre, HAYWARDS HEATH	0.4%	4	1.4%	2	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	1.1%	1	0.0%	0
Sainsbury's, Brooklands Way, EAST GRINSTEAD	8.6%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	12	45.9%	73	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Downlands Business Park, Lyons Farm, WORTHING	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Sainsbury's, Harlands Road, HAYWARDS HEATH	15.7%	158	68.8%	97	1.6%	2	55.0%	16	18.2%	20	0.0%	0	0.0%	0	29.5%	21	2.5%	1	2.4%	2	0.0%	0
Sainsbury's, London Road,	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
BRIGHTON																						
Sainsbury's, Old Shoreham Road, Benfield Valley, HOVE	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	2.6%	2	8.5%	9
Sainsbury's, Queensway, CRAWLEY	0.7%	7	0.0%	0	0.0%	0	0.0%	0	4.6%	5	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Staine Street, Codmore Hill, PULBOROUGH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Sainsburys, West Green, CRAWLEY	3.1%	31	0.0%	0	0.0%	0	0.0%	0	13.8%	15	10.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Worthing Road, HORSHAM	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	0.0%	0
Tesco Express, Orchards Shopping Centre, Hazelgrove Road, HAYWARDS HEATH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra (Gatwick Airport), Reigate Road, Hookwood, HORLEY	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, CRAWLEY	9.5%	96	0.0%	0	1.2%	2	0.7%	0	16.1%	18	48.7%	75	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Bell Farm Road, UCKFIELD	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.8%	12	0.0%	0	0.0%	0	0.0%	0
Tesco, Brooks Road, LEWES	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, BURGESS HILL	14.8%	149	9.3%	13	58.3%	77	26.2%	7	0.8%	1	0.5%	1	0.0%	0	5.1%	4	49.6%	18	36.5%	24	3.1%	3
Tesco, Station Road, Portslade, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Tesco, Wickhurst Lane, Broadbridge Heath, HORSHAM	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, UCKFIELD	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	6	0.0%	0	0.0%	0	0.0%	0
Waitrose, Market Place, BURGESS HILL	2.6%	26	0.0%	0	8.9%	12	3.1%	1	0.9%	1	0.0%	0	0.0%	0	2.1%	2	10.6%	4	8.6%	6	1.1%	1
Waitrose, Victoria Road, HORLEY	1.4%	14	0.0%	0	0.0%	0	0.0%	0	5.8%	6	5.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, EAST GRINSTEAD	4.0%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4	21.5%	34	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, Western Road, BRIGHTON	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	4.5%	5
Local shops, Brighton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3
Local shops, Burgess Hill	0.2%	2	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.0%	0	0.8%	1	0.0%	0
Local shops, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Local shops, East Grinstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hove	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Local shops, Hurstpierpoint	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Local shops, Shoreham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Aldi, Brooks Road, LEWES	0.4%	4	0.0%	0	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	2.2%	1	0.8%	1	0.0%	0
Aldi, Carlton Terrace, PORTSLADE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1
Aldi, London Road, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Aldi, London Road, EAST GRINSTEAD	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	15.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, London Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Iceland, Broadfield Barton, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Haslett Avenue, CRAWLEY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, North Street, WORTHING	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Local shops, Forest Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, SHOREHAM-BY-SEA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, HORSHAM	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Western Road, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Morrisons, Broadfield Community Centre, Broadfield Barton, CRAWLEY	1.1%	11	0.0%	0	0.0%	0	0.0%	0	7.7%	8	1.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Pine Grove, CROWBOROUGH	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	6.1%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Carden Avenue, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Express, Downland Drive, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Holmbush Centre, Upper Shoreham Road, SHOREHAM-BY-SEA	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4	0.8%	1
Tesco, Church Road, HOVE	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	4
Waitrose, Croft Road, CROWBOROUGH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Eastgate Street, LEWES	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Waitrose, Fortune Way, WEST MALLING	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, WORTHING	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Waitrose, Nevill Road, HOVE	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	5
Waitrose, Old Mill Square, STORRINGTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Internet / mail order	9.2%	92	15.6%	22	7.4%	10	4.2%	1	6.6%	7	9.4%	15	7.3%	12	11.8%	8	5.8%	2	13.3%	9	6.3%	7
(Don't know / varies)	1.8%	18	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	5.2%	8	0.0%	0	1.8%	1	1.2%	1	5.3%	6
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q02 How do you normally travel to (STORE MENTIONED AT Q01)?
Excluding those who shop via 'Internet / mail order' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	77.1%	704	74.9%	89	77.0%	95	88.7%	24	74.1%	76	89.2%	125	67.9%	101	83.8%	53	79.2%	27	83.3%	48	67.3%	67
Car / van (as passenger)	8.3%	76	8.1%	10	10.2%	12	6.3%	2	5.8%	6	7.3%	10	6.5%	10	10.2%	6	6.1%	2	6.3%	4	14.7%	15
Bus, minibus or coach	3.0%	28	0.0%	0	2.2%	3	1.4%	0	12.1%	12	0.0%	0	1.8%	3	1.9%	1	3.8%	1	0.0%	0	7.1%	7
Using park & ride facility	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Walk	9.3%	85	14.2%	17	9.8%	12	1.0%	0	6.8%	7	0.8%	1	22.9%	34	0.0%	0	4.4%	2	9.5%	5	7.2%	7
Taxi	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	2.5%	2
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / wheelchair	0.2%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.2%	11	1.1%	1	0.7%	1	2.6%	1	0.6%	1	0.6%	1	0.9%	1	3.4%	2	5.8%	2	0.0%	0	1.3%	1
Weighted base:		914		119		123		27		102		140		148		63		34		57		99
Sample:		933		90		93		97		92		90		94		93		94		95		95

Q03 In addition to (STORE MENTIONED AT Q01), is there any other store that you regularly use for your main-food shopping? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Pegler Way, CRAWLEY	3.8%	38	0.0%	0	3.9%	5	0.0%	0	9.7%	11	13.7%	21	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, The Crumbles, Pevensey Bay Road, EASTBOURNE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda Supesrtore, Crowhurst Road, Hollingbury, BRIGHTON	1.3%	13	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	3.4%	1	3.5%	2	4.2%	4
Budgens, High Street, HENFIELD	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	4	0.0%	0
Budgens, Orion Parade, Keymer Road, HASSOCKS	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.1%	7	1.9%	1	0.0%	0
Co-op Group South East, High Street, HEATHFIELD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Group South East, Neville Road, HOVE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Co-op, High Street, Hurstpierpoint, HASSOCKS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0
Co-op, High Street, LINDFIELD	0.4%	4	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Middle Village, Bolnore Village, HAYWARDS HEATH	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Oddyness High Street, Cuckfield, HAYWARDS HEATH	0.5%	5	1.6%	2	0.0%	0	2.7%	1	0.6%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Sheddingdean, Neighbourhood Centre, BURGESS HILL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, South Road, HAYWARDS HEATH	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Haywards Road, HAYWARDS HEATH	0.7%	7	4.7%	7	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Queens Walk, EAST GRINSTEAD	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, The Martlets, BURGESS HILL	1.1%	11	0.0%	0	5.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	3	0.0%	0	0.8%	1
Lidl, Arundel Road, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Lidl, The Martlets, BURGESS HILL	1.8%	18	2.5%	3	6.5%	9	0.7%	0	0.6%	1	0.0%	0	0.0%	0	1.5%	1	3.9%	1	3.9%	3	0.0%	0
Marks & Spencer, North	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
End, CROYDON																						
Marks & Spencer, Orchards Shopping Centre, HAYWARDS HEATH	2.6%	27	12.4%	18	0.0%	0	8.5%	2	1.8%	2	0.0%	0	0.0%	0	4.6%	3	1.0%	0	0.0%	0	1.1%	1
Morrisons M Local, America Lane, HAYWARDS HEATH	0.9%	9	6.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, St James Street, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.8%	1
Plaw Hatch Farm Shop, Plawhatch Lane, Sharpthorn, EAST GRINSTEAD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, EAST GRINSTEAD	5.8%	58	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	8	28.5%	46	6.8%	5	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Harlands Road, HAYWARDS HEATH	3.1%	32	5.9%	8	7.3%	10	10.6%	3	1.8%	2	0.0%	0	0.0%	0	8.6%	6	3.6%	1	1.9%	1	0.0%	0
Sainsbury's, Lewes Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Sainsbury's, London Road, BRIGHTON	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3
Sainsbury's, London Road, REDHILL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sainsbury's, Old Shoreham Road, Benfield Valley, HOVE	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	3.9%	4
Sainsbury's, Queensway, CRAWLEY	0.8%	8	0.0%	0	0.0%	0	0.0%	0	5.7%	6	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys, West Green, CRAWLEY	2.9%	29	0.0%	0	0.0%	0	0.0%	0	6.7%	7	13.8%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Worthing Road, HORSHAM	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Tesco Express, Orchards Shopping Centre, Hazelgrove Road, HAYWARDS HEATH	0.3%	3	0.8%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra (Gatwick Airport), Reigate Road, Hookwood, HORLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, CRAWLEY	3.8%	38	0.0%	0	0.0%	0	0.0%	0	10.3%	11	12.3%	19	4.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Bell Farm Road, UCKFIELD	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	7	0.0%	0	0.0%	0	0.0%	0
Tesco, Brooks Road, LEWES	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.1%	1
Tesco, Hammonds Farm, Jane Murray Way,	4.7%	48	13.5%	19	9.0%	12	10.0%	3	0.8%	1	0.0%	0	0.0%	0	5.1%	4	14.4%	5	5.1%	3	0.8%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
BURGESS HILL																						
Tesco, Station Road, Portslade, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Tesco, Wickhurst Lane, Broadbridge Heath, HORSHAM	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Waitrose, High Street, UCKFIELD	0.5%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4	0.0%	0	0.0%	0	0.0%	0
Waitrose, Market Place, BURGESS HILL	7.1%	72	8.8%	12	24.8%	33	17.6%	5	1.4%	2	0.0%	0	0.0%	0	5.6%	4	16.7%	6	11.7%	8	1.9%	2
Waitrose, Victoria Road, HORLEY	0.8%	8	0.0%	0	0.0%	0	0.0%	0	1.2%	1	4.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, EAST GRINSTEAD	4.0%	40	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.1%	2	23.2%	37	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Western Road, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	1.6%	2
Local shops, Brighton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	2.2%	2
Local shops, Burgess Hill	0.4%	4	0.0%	0	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.4%	1	1.2%	1	0.0%	0
Local shops, Crawley Down	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Cuckfield	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hassocks	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Local shops, Haywards Heath	0.3%	3	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Local shops, Hurstpierpoint	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Local shops, Shoreham	0.3%	3	0.0%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Local shops, Uckfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Brooks Road, LEWES	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	1.5%	1	0.0%	0	0.0%	0
Aldi, Carlton Terrace, PORTSLADE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Aldi, London Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Aldi, London Road, EAST GRINSTEAD	3.1%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	18.3%	29	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Dyke Road, Seven Dials, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Co-op, High Street, STEYNING	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Co-op, London Road, BRIGHTON	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Co-op, Old London Road, PATCHAM	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Iceland, Broadfield Barton, CRAWLEY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Haslett Avenue, CRAWLEY	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Lidl, Beacon Road, CROWBOROUGH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Haslett Avenue, CRAWLEY	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Forest Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Henfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Local shops, Poynings	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Marks & Spencer Simply Food, Brighton Retail Park, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Marks & Spencer, Holmbush Centre, Upper Shoreham Road, SHOREHAM-BY-SEA	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.9%	2
Marks & Spencer, Lewes Road, Hollingbury, BRIGHTON	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3
Marks & Spencer, Queensway, CRAWLEY	0.2%	2	0.0%	0	0.0%	0	0.7%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, HORSHAM	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Western Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Morrisons, Bell Street, REIGATE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Broadfield Community Centre, Broadfield Barton, CRAWLEY	2.4%	24	0.0%	0	0.0%	0	0.0%	0	19.4%	21	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Newland Street, WORTHING	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Morrisons, Pine Grove, CROWBOROUGH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Carden Avenue, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sainsbury's Local, Preston Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Sainsbury's Superstore, Otford Road, SEVENOAKS	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dyke Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Extra, Holmbush Centre, Upper Shoreham Road, SHOREHAM-BY-SEA	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.8%	1
Tesco, Church Road, HOVE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Waitrose, Croft Road, CROWBOROUGH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Eastgate Street, LEWES	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, WORTHING	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Waitrose, Nevill Road, HOVE	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4
Waitrose, Old Mill Square, STORRINGTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Waitrose, Pirie's Place, HORSHAM	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / mail order	2.1%	21	4.1%	6	0.5%	1	1.4%	0	1.8%	2	0.7%	1	0.0%	0	8.9%	6	0.0%	0	2.2%	1	2.8%	3
(Don't know / varies)	3.2%	33	1.4%	2	4.8%	6	3.8%	1	3.4%	4	1.5%	2	5.2%	8	0.0%	0	2.0%	1	1.9%	1	6.3%	7
(Nowhere else)	34.5%	347	41.2%	58	40.7%	54	45.4%	13	28.3%	31	34.7%	54	22.0%	35	29.5%	21	30.3%	11	39.6%	26	41.4%	44
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q04 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]
Excluding those who shop via 'Internet / mail order' at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Yes - non-food shopping	11.5%	105	11.9%	14	16.1%	20	9.9%	3	6.4%	7	8.4%	12	8.5%	13	20.5%	13	13.5%	5	5.8%	3	17.0%	17
Yes - other food shopping	6.0%	55	2.8%	3	16.6%	20	1.8%	0	0.6%	1	2.3%	3	7.8%	12	7.6%	5	11.9%	4	0.9%	1	5.7%	6
Yes - bars / pubs	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.5%	2	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Yes - bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - cafés	2.0%	19	0.7%	1	0.8%	1	2.1%	1	6.0%	6	0.8%	1	1.8%	3	2.5%	2	4.1%	1	3.0%	2	1.7%	2
Yes - cinemas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	5.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - get petrol	3.0%	28	1.1%	1	5.9%	7	2.9%	1	7.0%	7	6.8%	10	0.0%	0	1.6%	1	2.3%	1	0.0%	0	0.0%	0
Yes - go to park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - gyms / health and fitness	0.8%	8	0.0%	0	0.7%	1	4.0%	1	1.9%	2	0.0%	0	2.1%	3	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Yes - library	0.8%	7	0.0%	0	0.7%	1	2.5%	1	0.6%	1	0.6%	1	1.2%	2	2.8%	2	2.3%	1	0.0%	0	0.0%	0
Yes - markets	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Yes - meeting family	0.7%	6	0.0%	0	0.5%	1	1.7%	0	0.6%	1	1.7%	2	0.9%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Yes - meeting friends	0.4%	3	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.9%	1	1.3%	1	1.2%	0	0.0%	0	0.0%	0
Yes - museums / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - other service (travel agent, estate agent)	0.5%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.8%	1
Yes - personal service (hairdressers, beauty salon)	0.8%	7	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.9%	1	0.0%	0	6.1%	4	0.8%	0	2.4%	1	0.0%	0
Yes - restaurants	0.3%	3	0.0%	0	0.5%	1	0.7%	0	0.0%	0	0.0%	0	0.9%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Yes - swimming	0.1%	1	0.7%	1	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting services such as banks and other financial institutions	2.1%	19	0.7%	1	1.2%	1	0.7%	0	1.3%	1	0.6%	1	2.3%	3	9.1%	6	0.8%	0	6.1%	3	1.2%	1
Yes - work	3.3%	30	6.0%	7	3.7%	5	0.0%	0	2.7%	3	7.5%	11	1.7%	2	1.1%	1	0.0%	0	0.9%	1	1.2%	1
Yes - other	0.6%	6	0.0%	0	0.0%	0	6.0%	2	0.9%	1	0.6%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.7%	2
No	72.7%	664	77.1%	92	65.3%	80	63.3%	17	67.3%	69	72.7%	102	78.1%	116	64.7%	41	73.3%	25	82.2%	47	76.4%	76
Yes - school run	0.3%	3	1.0%	1	0.0%	0	2.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting amenity tip / recycling	0.3%	3	0.0%	0	0.0%	0	0.7%	0	0.9%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
(Don’t know)	0.4%	4	0.7%	1	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.6%	1	0.0%	0	1.6%	1	0.9%	1	0.0%	0
Weighted base:		914		119		123		27		102		140		148		63		34		57		99
Sample:		933		90		93		97		92		90		94		93		94		95		95

Q05 When you combine your trip with other activities, where do you normally go? [MR]
Those who combine their main food shopping trip with other activities at Q04:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton City Centre	6.2%	15	6.8%	2	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	0	13.9%	1	46.8%	11
Burgess Hill Town Centre	26.2%	64	20.4%	5	94.1%	40	33.1%	3	9.4%	3	0.0%	0	0.0%	0	10.3%	2	69.3%	6	34.1%	3	3.5%	1
Crawley Town Centre	19.7%	48	27.5%	7	0.0%	0	2.0%	0	56.7%	19	51.7%	20	6.9%	2	0.0%	0	4.1%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	17.1%	42	0.0%	0	0.0%	0	0.0%	0	2.0%	1	33.1%	13	86.5%	27	6.4%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1
Hassocks Town Centre	1.2%	3	6.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	1	0.0%	0	0.0%	0
Haywards Heath Town Centre	12.9%	32	38.6%	10	0.0%	0	37.3%	4	22.3%	7	0.0%	0	0.0%	0	38.9%	9	14.9%	1	5.4%	1	0.0%	0
Horley Town Centre	1.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	1.2%	3	0.0%	0	0.0%	0	2.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	5.1%	1
Hove Town Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	0	5.4%	1	3.5%	1
Hurstpierpoint Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	1	0.0%	0
Lewes Town Centre	1.4%	3	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	2	0.0%	0	0.0%	0	0.0%	0
Lindfield Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Newhaven Town Centre	0.1%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	1.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	1	10.3%	2
Uckfield Town Centre	2.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.1%	6	0.0%	0	0.0%	0	0.0%	0
Broadfield Local Centre	0.8%	2	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Ferring Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heathfield Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.3%	2	0.0%	0
Hollingbury Local Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	2
Redhill Town Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Three Bridges Local Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Twineham Village Centre	0.7%	2	0.0%	0	0.0%	0	16.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Green Village Centre, Hampshire	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	4.2%	10	0.0%	0	3.0%	1	8.1%	1	0.0%	0	0.0%	0	6.6%	2	3.6%	1	7.4%	1	0.0%	0	20.3%	5
Weighted base:		246		26		43		10		33		38		32		22		9		10		23
Sample:		255		16		27		34		30		22		25		33		28		17		23

Q06 What do you like about this store / town centre? [MR]

Excluding those who combine their shopping trip with other activities in Burgess Hill, East Grinstead or Haywards Heath at Q05:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing / very little	14.9%	16	0.0%	0	0.0%	0	12.5%	0	16.2%	4	12.5%	3	0.0%	0	10.1%	1	33.1%	1	8.8%	1	30.5%	7
Attractive environment / nice place	12.9%	14	0.0%	0	0.0%	0	52.8%	2	13.0%	3	0.0%	0	0.0%	0	37.6%	4	12.2%	0	22.9%	1	17.9%	4
Close to friends or relatives	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to home	16.3%	18	0.0%	0	100.0%	3	0.0%	0	12.7%	3	21.6%	6	20.7%	1	37.4%	4	0.0%	0	38.5%	2	0.0%	0
Close to work	4.6%	5	0.0%	0	50.0%	1	0.0%	0	3.9%	1	6.8%	2	28.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Compact	11.2%	12	0.0%	0	0.0%	0	0.0%	0	11.9%	3	32.3%	8	0.0%	0	10.1%	1	12.2%	0	0.0%	0	0.0%	0
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	8.0%	9	0.0%	0	0.0%	0	0.0%	0	28.0%	6	0.0%	0	0.0%	0	9.7%	1	12.2%	0	0.0%	0	5.3%	1
Easy to park	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.9%	2	0.0%	0	12.0%	1	0.0%	0
Good facilities	4.5%	5	0.0%	0	0.0%	0	0.0%	0	7.5%	2	0.0%	0	0.0%	0	7.8%	1	0.0%	0	0.0%	0	10.7%	2
Good food stores	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.7%	1	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Good pubs, cafés or restaurants	3.2%	3	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	1	7.3%	2
Good range of non-food shops	21.8%	24	83.5%	9	0.0%	0	0.0%	0	38.4%	9	11.2%	3	0.0%	0	15.0%	2	24.4%	1	8.8%	1	3.6%	1
Makes a change from other places	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quiet	2.0%	2	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	3.6%	1
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The market	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Traditional	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0	14.1%	1	0.0%	0
Traffic free shopping centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	3.0%	3	0.0%	0	0.0%	0	6.3%	0	0.0%	0	4.4%	1	0.0%	0	7.2%	1	0.0%	0	0.0%	0	5.3%	1
A specific shop	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A specific attraction	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Familiarity / preference for retailer	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	17.7%	1	0.0%	0
Lower prices	1.0%	1	0.0%	0	0.0%	0	9.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1
(Don't know)	9.7%	11	16.5%	2	0.0%	0	19.3%	1	0.0%	0	9.2%	2	0.0%	0	0.0%	0	17.9%	0	0.0%	0	24.6%	6
Weighted base:		110		11		3		3		22		26		4		10		2		6		23
Sample:		105		3		2		7		18		16		4		16		7		10		22

Q07 In addition to your main food shopping, where do you do most of your household's small scale 'top-up' food shopping (i.e. the store you visit regularly (2+ times a week to buy bread, milk, etc., on a day-to-day basis)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Pegler Way, CRAWLEY	1.4%	14	0.0%	0	0.0%	0	0.0%	0	2.9%	3	5.7%	9	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Supesrtore, Crowhurst Road, Hollingbury, BRIGHTON	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	10
Budgens, High Street, HENFIELD	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	9	0.0%	0
Budgens, Orion Parade, Keymer Road, HASSOCKS	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.8%	14	4.3%	3	0.8%	1
Co-op (post office), Pound Hill Parade, CRAWLEY	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.6%	1	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Group South East, High Street, HEATHFIELD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Hurstpierpoint, HASSOCKS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Co-op, High Street, LINDFIELD	0.6%	6	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Langley Green, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Middle Village, Bolnore Village, HAYWARDS HEATH	1.2%	12	8.5%	12	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Newlands Place, Hartfield Row, FOREST ROW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Oddyness High Street, Cuckfield, HAYWARDS HEATH	0.5%	5	0.0%	0	0.0%	0	16.1%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Sheddingdean, Neighbourhood Centre, BURGESS HILL	1.2%	12	0.0%	0	9.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, South Road, HAYWARDS HEATH	0.7%	7	3.0%	4	0.0%	0	6.4%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, CRAWLEY DOWN	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	11	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Martlets, Church Road, BURGESS HILL	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Costcutter, North Chailey Cross Road, Chailey, LINDFIELD	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Haywards Road,	0.7%	7	4.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
HAYWARDS HEATH																						
Iceland, Queens Walk, EAST GRINSTEAD	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, The Martlets, BURGESS HILL	0.9%	9	0.0%	0	5.9%	8	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.2%	1	0.0%	0
Londis, London Road, BURGESS HILL	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mace, Ifield Green, CRAWLEY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Calverley Road, TUNBRIDGE WELLS	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Orchards Shopping Centre, HAYWARDS HEATH	1.9%	19	7.4%	10	0.0%	0	4.9%	1	2.1%	2	0.8%	1	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0
Morrisons M Local, America Lane, HAYWARDS HEATH	0.4%	4	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, EAST GRINSTEAD	4.2%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	25.8%	41	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Harlands Road, HAYWARDS HEATH	4.3%	43	24.1%	34	1.6%	2	10.8%	3	1.4%	2	0.0%	0	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, London Road, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Sainsbury's, Old Shoreham Road, Benfield Valley, HOVE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sainsbury's, Queensway, CRAWLEY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys, West Green, CRAWLEY	0.7%	7	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swains Farm Shop, Brighton Road, Woodmancote, HENFIELD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Tesco Express, Orchards Shopping Centre, Hazelgrove Road, HAYWARDS HEATH	0.4%	4	1.9%	3	0.7%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra (Gatwick Airport), Reigate Road, Hookwood, HORLEY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, CRAWLEY	1.3%	13	0.0%	0	0.0%	0	0.0%	0	2.4%	3	6.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Bell Farm Road, UCKFIELD	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0	0.0%	0	0.0%	0
Tesco, Brooks Road, LEWES	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco, Hammonds Farm, Jane Murray Way, BURGESS HILL	3.7%	37	3.8%	5	20.2%	27	4.5%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	2	5.6%	2	0.0%	0	0.0%	0
Tesco, Kingfisher Drive, EASTBOURNE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Station Road, Portslade, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Waitrose, High Street, UCKFIELD	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4	0.0%	0	0.0%	0	0.0%	0
Waitrose, Market Place, BURGESS HILL	2.6%	26	0.8%	1	17.3%	23	3.7%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.4%	1	0.0%	0	0.0%	0
Waitrose, Victoria Road, HORLEY	0.5%	5	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, EAST GRINSTEAD	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	21	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ashurst Wood	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Balcombe	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Brighton	1.2%	12	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	7
Local shops, Burgess Hill	0.7%	8	0.6%	1	3.3%	4	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.3%	2	0.0%	0	0.0%	0
Local shops, Crawley	0.9%	9	0.0%	0	0.7%	1	0.0%	0	3.0%	3	2.4%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Crawley Down	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Cuckfield	0.4%	4	0.0%	0	0.0%	0	9.5%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Danehill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, East Grinstead	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Handcross	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hassocks	0.9%	9	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.4%	5	4.7%	3	0.0%	0
Local shops, Haywards Heath	0.4%	4	1.4%	2	0.0%	0	1.0%	0	0.6%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsham	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.1%	1	0.0%	0
Local shops, Horsted Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Hove	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Local shops, Hurstpierpoint	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	9	0.0%	0
Local shops, Lindfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Tonbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Tunbridge Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Local shops, Uckfield	0.3%	3	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Wiverfield Green	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	5	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Aldi, London Road, EAST GRINSTEAD	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Carden Avenue, PATCHAM	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Co-op, Dyke Road, Seven Dials, BRIGHTON	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Co-op, Maidenbower Drive, Maidenbower, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Old London Road, PATCHAM	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6
Co-op, Station Road, REDHILL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Street, COWFOLD	0.1%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Tilgate Parade, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, The Broadway, Plough Lane, CROYDON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Broadfield Barton, CRAWLEY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Haslett Avenue, CRAWLEY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broadfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Chailey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Chesswood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ditchling	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local shops, Forest Row	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Henfield	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	7	0.0%	0
Local shops, Maidenbower	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Newick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Patcham	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	5
Local shops, Sayers Common	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Local shops, Scaynes Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Whitemans Green	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer BP, Junction A23 and A272, Pyecombe Village, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Marks & Spencer, Lewes Road, Hollingbury, BRIGHTON	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Marks & Spencer, North End BP, London Road, EAST GRINSTEAD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, HORSHAM	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Broadfield Community Centre, Broadfield Barton, CRAWLEY	2.4%	24	0.0%	0	0.0%	0	0.0%	0	21.8%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's Local, Carden Avenue, BRIGHTON	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	5
Sainsbury's Local, Preston Road, BRIGHTON	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sainsbury's Local, Wivelsfield Road, HAYWARDS HEATH	0.2%	2	0.0%	0	0.0%	0	0.9%	0	0.6%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bonehurst Road, HORLEY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Esso Express, Lewes Road, FOREST ROW	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Browns Lane, UCKFIELD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Downland Drive, CRAWLEY	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dyke Road, BRIGHTON	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Tesco Express, Gatehouse Lane, BURGESS HILL	1.0%	10	0.0%	0	6.2%	8	1.4%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.8%	1	0.0%	0
Tesco Express, Peterhouse Parade, Poundhill, CRAWLEY	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, The Droveway, HOVE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Waitrose, Eastgate Street, LEWES	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	6.0%	2	0.0%	0	0.0%	0
Waitrose, Nevill Road, HOVE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Waitrose, Pirie's Place, HORSHAM	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / mail order	0.4%	4	0.0%	0	0.0%	0	1.4%	0	0.0%	0	1.9%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	6.6%	66	10.0%	14	1.1%	1	5.3%	2	5.6%	6	8.6%	13	11.3%	18	2.1%	1	2.5%	1	1.1%	1	7.8%	8
(Don't do top-up shopping)	31.8%	320	25.7%	36	27.4%	36	25.3%	7	32.6%	36	33.8%	52	24.2%	39	43.4%	31	21.8%	8	43.8%	29	43.3%	46
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q08 Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping?
Those who do top-up shopping at Q07:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
1 - 5%	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
6 - 10%	0.2%	2	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
11 - 15%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
16 - 20%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
21 - 25%	0.8%	5	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
26 - 30%	0.4%	3	0.0%	0	0.9%	1	1.2%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
31 - 35%	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
36 - 40%	0.6%	4	0.0%	0	0.0%	0	0.9%	0	1.2%	1	0.0%	0	1.5%	2	1.7%	1	1.3%	0	0.0%	0	0.0%	0
41 - 45%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	1.4%	1	0.0%	0
46 - 50%	7.2%	49	11.8%	12	15.0%	14	9.8%	2	3.3%	2	2.5%	3	2.8%	3	3.1%	1	5.5%	2	15.1%	6	6.0%	4
51 - 55%	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
56 - 60%	7.7%	53	15.7%	16	4.7%	5	4.0%	1	3.6%	3	12.3%	13	6.3%	8	7.7%	3	4.4%	1	5.5%	2	3.2%	2
61 - 65%	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
66 - 70%	7.4%	50	3.1%	3	9.1%	9	3.1%	1	11.3%	8	5.1%	5	8.1%	10	7.5%	3	7.2%	2	12.3%	5	8.0%	5
71 - 75%	8.6%	59	5.1%	5	7.5%	7	7.6%	2	14.4%	11	9.7%	10	3.8%	5	17.4%	7	7.3%	2	1.4%	1	16.9%	10
76 - 80%	25.6%	175	23.3%	24	26.9%	26	31.8%	7	23.6%	17	27.4%	28	33.1%	40	14.9%	6	19.7%	6	18.7%	7	23.2%	14
81 - 85%	3.5%	24	5.8%	6	3.6%	4	3.4%	1	3.2%	2	2.9%	3	2.0%	2	5.4%	2	1.8%	1	4.3%	2	2.8%	2
86 - 90%	14.8%	102	16.3%	17	8.1%	8	11.6%	2	19.1%	14	14.3%	15	10.6%	13	25.7%	10	21.7%	6	14.3%	5	17.9%	11
91 - 95%	3.9%	27	0.8%	1	2.2%	2	2.8%	1	3.0%	2	3.7%	4	10.0%	12	3.1%	1	11.7%	3	0.0%	0	1.4%	1
96 - 100%	2.1%	14	1.7%	2	6.2%	6	4.7%	1	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	1	1.9%	1
(Don't know)	15.5%	107	12.6%	13	14.9%	14	16.2%	3	14.9%	11	17.2%	18	16.7%	20	13.6%	6	13.2%	4	17.2%	6	18.6%	11
(Refused)	0.7%	5	0.8%	1	1.0%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	4.1%	2	0.0%	0
Mean:		*75.50*		*72.63*		*74.54*		*75.50*		*76.34*		*76.85*		*75.54*		*78.29*		*79.23*		*70.65*		*78.06*
Weighted base:		686		105		96		21		74		103		121		41		28		37		60
Sample:		667		71		70		75		65		63		76		54		78		59		56

Q09 I would now like to ask you some questions about your non-food shopping habits / preferences - In which ONE town centre, freestanding store or retail park do you do most of your household's shopping for men's, women's, children's and baby clothing and footwear (fashion items - not sports clothing and footwear)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Marks & Spencer, Shoreham	0.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Bluewater Shopping Centre, Greenhythe	1.3%	13	0.0%	0	0.5%	1	0.7%	0	4.9%	5	1.3%	2	1.4%	2	3.6%	3	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	1.5%	15	0.0%	0	0.0%	0	0.0%	0	7.5%	8	4.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Brighton Town Centre	21.7%	218	27.6%	39	31.6%	42	13.3%	4	4.4%	5	1.7%	3	7.4%	12	15.0%	11	47.8%	17	31.6%	21	61.4%	65
Burgess Hill Town Centre	3.5%	36	2.1%	3	13.0%	17	8.8%	3	0.0%	0	0.0%	0	0.0%	0	2.5%	2	12.2%	4	10.1%	7	0.0%	0
Central London / West End	2.1%	21	2.2%	3	1.0%	1	1.9%	1	1.7%	2	2.2%	3	4.1%	7	3.1%	2	0.0%	0	2.2%	1	0.8%	1
Crawley Town Centre	29.7%	298	19.4%	27	21.8%	29	22.2%	6	60.9%	67	60.4%	93	37.0%	59	8.1%	6	8.1%	3	8.8%	6	1.9%	2
Croydon Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	2.4%	24	0.0%	0	0.0%	0	0.0%	0	1.6%	2	3.4%	5	10.2%	16	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	1.1%	11	0.6%	1	4.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.8%	1	0.8%	1
Guildford Town Centre	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Hailsham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.3%	1	0.0%	0
Haywards Heath Town Centre	4.5%	46	18.9%	27	1.4%	2	12.3%	3	0.9%	1	0.0%	0	0.0%	0	14.6%	10	4.6%	2	0.8%	1	0.0%	0
Horsham Town Centre	2.1%	21	0.0%	0	1.1%	1	10.3%	3	2.8%	3	2.5%	4	0.0%	0	0.0%	0	0.7%	0	13.1%	9	0.8%	1
Hove Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.6%	1	3.1%	3
Hurstpierpoint Local Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lewes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Shoreham Town Centre	1.1%	11	1.5%	2	1.6%	2	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	3.1%	2	2.7%	3
Tonbridge Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells Town Centre	4.1%	41	0.9%	1	0.0%	0	0.7%	0	1.4%	2	2.1%	3	14.6%	23	15.9%	11	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	0	5.1%	3	1.9%	2
Abroad	0.4%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Asda, Pegler Way, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicester Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Brighton Retail Park, Carden Avenue, Brighton	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Chichester City Centre	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Colchester Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Mall Shopping Centre, Crawley	0.7%	7	0.8%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	3.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Findon Village Centre	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Hollingbury Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.6%	1	1.6%	2
Kingston-upon-Thames Town Centre	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portslade Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Salisbury City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	12.4%	125	12.9%	18	14.5%	19	16.1%	5	6.8%	7	10.5%	16	16.1%	26	20.8%	15	7.9%	3	8.3%	6	9.5%	10
(Don't know)	3.4%	34	7.6%	11	1.9%	2	4.9%	1	0.0%	0	4.0%	6	2.9%	5	3.3%	2	3.2%	1	4.2%	3	2.3%	2
(Don't do this type of shopping)	4.2%	42	4.7%	7	4.9%	7	2.8%	1	4.1%	5	3.7%	6	1.7%	3	2.0%	1	4.3%	2	5.8%	4	7.7%	8
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q10 How do you normally travel to (STORE OR CENTRE MENTIONED AT Q09)?
Those who do non-food shopping at a specific location (excluding those who shop via 'Internet / mail order') at Q09:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	67.7%	545	59.9%	63	62.4%	65	85.0%	19	66.9%	65	83.7%	106	74.0%	94	78.9%	42	58.6%	18	73.7%	40	40.1%	34
Car / van (as passenger)	5.3%	42	3.0%	3	9.6%	10	4.2%	1	1.6%	2	2.9%	4	4.2%	5	7.7%	4	2.5%	1	8.7%	5	9.7%	8
Bus, minibus or coach	12.0%	97	2.7%	3	4.9%	5	4.9%	1	22.2%	22	6.9%	9	9.6%	12	5.9%	3	16.9%	5	16.2%	9	33.2%	28
Using park & ride facility	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	5.7%	46	12.5%	13	8.3%	9	2.5%	1	2.7%	3	1.9%	2	4.9%	6	0.0%	0	1.1%	0	0.0%	0	13.7%	12
Taxi	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.8%	0	0.0%	0	1.0%	1
Train	7.7%	62	21.9%	23	14.1%	15	2.4%	1	4.8%	5	1.4%	2	5.1%	6	6.6%	3	19.1%	6	1.4%	1	1.0%	1
Bicycle	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1	1.5%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Mobility scooter / wheelchair	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.7%	6	0.0%	0	0.9%	1	0.9%	0	1.0%	1	2.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		805		105		104		22		97		127		126		53		31		54		85
Sample:		800		77		84		76		85		77		81		78		81		81		80

Q11 Where do you normally do most of your household's shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (Excluding video games)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton Town Centre	3.7%	37	1.3%	2	2.6%	3	1.4%	0	1.7%	2	0.0%	0	4.7%	7	0.0%	0	3.9%	1	6.6%	4	15.1%	16
Burgess Hill Town Centre	1.5%	15	0.0%	0	8.6%	11	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.1%	1	3.5%	2	0.0%	0
Central London / West End	0.4%	4	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	0	1.6%	1	0.0%	0
Crawley Town Centre	7.4%	74	4.3%	6	6.7%	9	10.0%	3	16.1%	18	15.0%	23	7.4%	12	1.0%	1	1.0%	0	2.7%	2	0.8%	1
Croydon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	2.0%	20	9.6%	13	0.0%	0	2.0%	1	1.4%	2	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.5%	5	0.0%	0	0.9%	1	2.4%	1	0.8%	1	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Shoreham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tunbridge Wells Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.1%	5	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.6%	1	1.1%	1
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	1.8%	2
Asda, Pegler Way, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Hollingbury Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Sainsbury's, Bannister Way, Haywards Heath	0.2%	2	0.9%	1	0.6%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	43.0%	432	50.5%	71	43.7%	58	46.6%	13	34.9%	38	47.0%	73	46.4%	74	49.3%	35	37.5%	14	31.5%	21	33.0%	35
(Don't know)	1.6%	16	0.8%	1	3.5%	5	0.7%	0	4.4%	5	0.0%	0	1.6%	2	0.0%	0	2.6%	1	0.8%	1	1.1%	1
(Don't do this type of shopping)	36.5%	367	31.2%	44	33.4%	44	35.4%	10	40.6%	44	35.3%	55	27.0%	43	37.1%	27	48.6%	18	49.5%	33	47.0%	50
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q12 Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, kindles, ipads, telephones, etc.)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Do It All, Burgess Hill	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhythe	0.4%	4	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.7%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	1.1%	1
Broadbridge Heath Retail Park, Horsham	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	8.8%	89	0.8%	1	4.3%	6	6.0%	2	27.0%	30	17.5%	27	13.7%	22	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.8%	8	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	6.5%	7
Hampden Retail Park, Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, CrawleyRetail Park	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.1%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Longfield Retail Park, Tunbridge Wells	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.2%	1	0.0%	0	0.8%	1
Brighton Town Centre	5.7%	58	2.8%	4	7.0%	9	4.0%	1	1.7%	2	0.0%	0	0.0%	0	3.0%	2	12.6%	5	10.1%	7	26.4%	28
Bromley Town Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	3.3%	33	5.2%	7	7.1%	9	8.1%	2	0.9%	1	0.0%	0	0.0%	0	4.5%	3	6.0%	2	10.0%	7	0.8%	1
Central London / West End	0.4%	4	0.8%	1	1.2%	2	0.0%	0	0.0%	0	0.5%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	9.6%	97	10.6%	15	11.1%	15	12.8%	4	18.4%	20	10.7%	17	13.2%	21	4.1%	3	0.0%	0	3.2%	2	0.8%	1
Croydon Town Centre	0.9%	9	0.6%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	4.7%	7	0.0%	0	0.0%	0	0.0%	0	0.8%	1
East Grinstead Town Centre	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	12.1%	19	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	1	0.0%	0
Hassocks Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0
Haywards Heath Town Centre	5.5%	55	22.2%	31	4.5%	6	10.4%	3	5.0%	6	0.0%	0	0.0%	0	11.3%	8	2.8%	1	0.8%	1	0.0%	0
Horsham Town Centre	0.5%	5	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	5	0.0%	0
Hove Town Centre	1.7%	17	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2	4.7%	3	9.5%	10
Shoreham Town Centre	0.3%	3	0.6%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Tonbridge Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	5.7%	4	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Asda, Pegler Way, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester City Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
County Mall Shopping Centre, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Currys, London Road, Crawley	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Currys, Old Shoreham Road,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Hove																						
Hollingbury Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
John Lewis, Portfield Way, Chichester	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Kingston-upon-Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portslade Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Sainsbury's, Bannister Way, Haywards Heath	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	29.6%	298	34.2%	48	31.3%	41	28.2%	8	21.2%	23	41.0%	63	23.7%	38	38.7%	28	26.6%	10	27.3%	18	18.9%	20
(Don't know)	7.2%	73	4.5%	6	5.8%	8	5.1%	1	6.5%	7	6.2%	10	14.1%	23	4.6%	3	10.9%	4	2.3%	2	8.7%	9
(Don't do this type of shopping)	18.7%	188	17.0%	24	22.9%	30	21.7%	6	16.8%	18	20.3%	31	11.7%	19	13.1%	9	25.9%	9	26.8%	18	21.2%	23
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q13 Where do you normally do most of your household's shopping for all other domestic electrical goods including small domestic electrical appliances (such as irons, kettles, fans, coffee makers, food mixers) and white goods (fridges, freezers, dishwashers) and smaller etc.)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Keymex, Reigate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Admiral Retail Park, Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhythe	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.3%	4	2.9%	2	1.0%	0	0.0%	0	1.1%	1
Broadbridge Heath Retail Park, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	9.5%	96	0.8%	1	4.4%	6	11.9%	3	27.3%	30	21.4%	33	13.3%	21	0.7%	1	0.0%	0	0.8%	1	0.0%	0
Goldstone Retail Park, Hove	1.0%	10	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	1	7.6%	8
Hampden Retail Park, Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
London Road Retail Park, CrawleyRetail Park	0.8%	8	0.0%	0	0.0%	0	0.0%	0	1.7%	2	3.3%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Longfield Retail Park, Tunbridge Wells	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Lottobridge Drove development, Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.2%	1	0.0%	0	1.1%	1
Brighton Town Centre	4.9%	49	0.0%	0	2.5%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1	8.3%	3	7.6%	5	34.2%	36
Burgess Hill Town Centre	10.1%	101	13.7%	19	36.5%	48	18.8%	5	0.8%	1	0.0%	0	0.0%	0	5.1%	4	24.9%	9	21.0%	14	0.8%	1
Central London / West End	0.3%	3	0.0%	0	1.2%	2	0.9%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	10.2%	103	14.8%	21	6.1%	8	2.1%	1	18.9%	21	18.3%	28	13.8%	22	2.1%	1	0.0%	0	0.8%	1	0.0%	0
Croydon Town Centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	6.3%	10	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Guildford Town Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.8%	1	0.0%	0
Haywards Heath Town Centre	7.8%	78	35.6%	50	0.0%	0	24.3%	7	6.7%	7	0.0%	0	0.0%	0	16.1%	12	3.3%	1	1.6%	1	0.0%	0
Horley Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.7%	7	0.9%	1	0.6%	1	0.9%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	6.2%	4	0.0%	0
Hove Town Centre	1.9%	20	1.3%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	8	8.9%	9
Lewes Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Reigate Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.9%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.6%	6	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	1.8%	2
Tunbridge Wells Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	6	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda, Pegler Way, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Retail Park, London Road, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Retail Park, Carden Avenue, Brighton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
County Mall Shopping Centre, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Currys, Old Shoreham Road, Hove	0.3%	3	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3
Edenbridge Town Centre, Kent	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fountains Retail Park, Tunbridge Wells	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hangleton Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Henfield Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Hollingbury Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Homebase, London Road, East Grinstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Lewis, Purley Way, Croydon	0.2%	2	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portslade Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Preston Circus Local Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Sainsbury's, Bannister Way, Haywards Heath	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Wickes, Bridge Park, London Road, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	24.9%	251	19.4%	27	22.8%	30	18.0%	5	23.3%	25	32.3%	50	26.7%	43	42.2%	30	24.6%	9	25.5%	17	13.3%	14
(Don't know)	7.1%	72	3.4%	5	6.6%	9	8.9%	3	4.7%	5	6.6%	10	13.5%	22	5.3%	4	13.5%	5	4.2%	3	6.6%	7
(Don't do this type of shopping)	10.4%	105	9.3%	13	17.0%	23	11.1%	3	10.7%	12	11.7%	18	7.9%	13	3.7%	3	13.6%	5	9.5%	6	9.3%	10
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q14 Where do you normally do most of your household's shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bluewater Shopping Centre, Greenhythe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.9%	6	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
London Road Retail Park, CrawleyRetail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	5.2%	52	0.9%	1	2.6%	3	2.5%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	6.2%	4	38.8%	41
Bromley Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burgess Hill Town Centre	7.2%	72	3.6%	5	34.0%	45	10.4%	3	0.6%	1	0.0%	0	0.0%	0	2.1%	2	18.4%	7	14.0%	9	1.1%	1
Central London / West End	0.1%	1	0.0%	0	0.0%	0	1.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Crawley Town Centre	10.6%	107	0.0%	0	5.1%	7	7.1%	2	38.8%	43	30.7%	48	5.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	6.3%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	5	36.0%	57	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Handcross Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Hassocks Town Centre	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.5%	8	2.4%	2	0.0%	0
Haywards Heath Town Centre	11.6%	116	54.2%	76	1.1%	1	38.2%	11	9.4%	10	0.0%	0	0.0%	0	20.6%	15	2.6%	1	2.6%	2	0.0%	0
Horley Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.6%	6	0.0%	0	0.0%	0	1.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	6.3%	4	0.0%	0
Hove Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	6
Hurstpierpoint Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0
Lewes Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.7%	0	0.0%	0	0.0%	0
Lindfield Town Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Tunbridge Wells Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	12	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	5
Gatwick Airport, Horley	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	4	0.0%	0
Lancing Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Patcham Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sainsbury's, Bannister Way, Haywards Heath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.2%	2	0.6%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Twickenham District Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Internet / catalogue	33.7%	339	33.2%	47	34.6%	46	27.8%	8	32.4%	35	31.9%	49	38.5%	61	44.6%	32	33.8%	12	34.8%	23	23.4%	25
(Don't know)	2.1%	21	0.0%	0	2.0%	3	4.2%	1	0.9%	1	3.6%	6	4.7%	7	0.0%	0	7.3%	3	0.0%	0	0.8%	1
(Don't do this type of shopping)	15.6%	157	5.7%	8	19.8%	26	6.3%	2	14.2%	16	22.3%	35	14.2%	23	10.7%	8	8.9%	3	20.3%	13	22.2%	23
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Mid Sussex Household Survey
For Planning Perspectives

Q15 Where do you normally do most of your household's shopping for games & toys; pets and pet products; hobby items; sport equipment and camping goods; bicycles; and musical instruments?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bluewater Shopping Centre, Greenhythe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	3.0%	30	0.0%	0	0.0%	0	0.0%	0	5.4%	6	13.5%	21	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.6%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	5
London Road Retail Park, CrawleyRetail Park	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longfield Retail Park, Tunbridge Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	3.9%	39	0.0%	0	1.1%	1	1.8%	1	2.3%	3	0.0%	0	4.7%	7	1.0%	1	8.0%	3	3.8%	3	19.6%	21
Burgess Hill Town Centre	8.7%	88	7.7%	11	42.8%	57	4.7%	1	0.6%	1	0.0%	0	0.0%	0	4.6%	3	15.1%	5	13.3%	9	0.8%	1
Central London / West End	0.1%	1	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	10.5%	106	10.9%	15	4.0%	5	11.2%	3	32.1%	35	24.5%	38	4.6%	7	1.5%	1	0.0%	0	0.8%	1	0.0%	0
Croydon Town Centre	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Town Centre	0.3%	3	1.3%	2	0.0%	0	2.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	5.9%	59	0.0%	0	0.0%	0	0.0%	0	0.8%	1	5.2%	8	31.5%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Handcross Town Centre	0.1%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	0	1.1%	1
Haywards Heath Town Centre	5.3%	54	25.2%	35	1.0%	1	12.5%	4	4.8%	5	0.0%	0	0.0%	0	11.1%	8	0.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.6%	6	0.0%	0	0.0%	0	1.4%	0	0.9%	1	0.5%	1	0.0%	0	0.0%	0	0.7%	0	3.6%	2	0.8%	1
Hove Town Centre	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	4	3.0%	3
Hurstpierpoint Local Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	4	0.0%	0
Lewes Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.1%	1
Newhaven Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tunbridge Wells Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	10	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.8%	1
Billingshurst Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Bolney Village Centre	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Retail Park, London Road, East Grinstead	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coxford Local Centre, Southampton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ditchling Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Felbridge Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forest Row Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Godstone Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.6%	6	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	3	1.1%	1
Lancing Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Littlehampton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1

Mid Sussex Household Survey
For Planning Perspectives

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Mid Sussex Retail Park, Jane Murray Way, Burgess Hill	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pease Pottage Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bannister Way, Haywards Heath	0.2%	2	0.8%	1	0.0%	0	1.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.2%	2	0.0%	0	1.1%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Woodstock Local Centre, Oxfordshire	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Copthorne Road, Pound Hill, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	19.6%	197	20.2%	28	17.5%	23	16.5%	5	22.1%	24	21.8%	34	19.0%	30	32.1%	23	18.8%	7	12.1%	8	14.0%	15
(Don't know)	4.3%	43	2.7%	4	3.2%	4	4.4%	1	2.4%	3	8.3%	13	3.6%	6	3.1%	2	4.6%	2	1.9%	1	7.2%	8
(Don't do this type of shopping)	30.1%	303	30.5%	43	28.5%	38	31.0%	9	26.2%	29	22.4%	35	25.0%	40	24.6%	18	44.5%	16	46.3%	31	43.3%	46
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q16 Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc.)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ikea, Croydon	2.1%	21	3.4%	5	5.4%	7	0.0%	0	3.2%	3	0.8%	1	1.2%	2	0.0%	0	0.0%	0	1.2%	1	1.6%	2
Marks & Spencer, Shoreham	1.0%	10	6.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhythe	1.5%	15	0.0%	0	0.0%	0	1.4%	0	4.9%	5	0.7%	1	3.6%	6	1.0%	1	1.0%	0	0.0%	0	1.1%	1
Broadbridge Heath Retail Park, Horsham	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	5.9%	59	0.9%	1	1.0%	1	6.9%	2	14.7%	16	16.7%	26	7.0%	11	1.5%	1	1.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.4%	4	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
London Road Retail Park, CrawleyRetail Park	0.6%	6	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longfield Retail Park, Tunbridge Wells	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Ardingly Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	5.1%	52	3.5%	5	6.0%	8	4.8%	1	0.6%	1	0.7%	1	0.8%	1	1.7%	1	14.2%	5	9.3%	6	20.5%	22
Burgess Hill Town Centre	8.2%	83	5.9%	8	37.1%	49	8.9%	3	0.9%	1	0.0%	0	0.0%	0	5.2%	4	24.6%	9	11.0%	7	1.9%	2
Central London / West End	0.9%	9	0.0%	0	0.0%	0	0.9%	0	0.8%	1	0.0%	0	0.8%	1	1.9%	1	0.7%	0	2.4%	2	3.5%	4
Crawley Town Centre	7.6%	76	9.3%	13	3.9%	5	4.8%	1	16.2%	18	11.2%	17	10.7%	17	1.7%	1	0.0%	0	2.7%	2	1.1%	1
Croydon Town Centre	1.3%	13	0.6%	1	0.0%	0	0.7%	0	4.9%	5	0.5%	1	3.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	6.7%	68	0.0%	0	0.0%	0	0.0%	0	5.7%	6	3.8%	6	34.1%	54	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.7%	7	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	1	0.8%	1
Guildford Town Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hailsham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Handcross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Haywards Heath Town Centre	4.8%	48	22.1%	31	0.0%	0	16.7%	5	0.0%	0	0.8%	1	0.0%	0	14.0%	10	2.4%	1	0.8%	1	0.0%	0
Horley Town Centre	1.3%	13	0.8%	1	0.0%	0	0.0%	0	2.0%	2	6.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.6%	6	0.9%	1	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	3	0.0%	0
Hove Town Centre	1.6%	16	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	6	9.1%	10
Hurstpierpoint Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Lewes Town Centre	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Lindfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0
Newhaven Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	1	0.0%	0
Shoreham Town Centre	1.1%	11	1.4%	2	1.4%	2	1.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	2.7%	2	4.0%	4
Tonbridge Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells Town Centre	1.4%	14	0.0%	0	1.0%	1	0.0%	0	0.6%	1	0.8%	1	4.2%	7	5.3%	4	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	9	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	1	0.0%	0
Asda, Pegler Way, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, London Road, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton Retail Park, Carden Avenue, Brighton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Carpetright, London Road, East Grinstead	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester City Centre	0.2%	2	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Forest Row Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Fountains Retail Park, Tunbridge Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Furniture Village, Old Shoreham Road, Hove	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	1.1%	1
Hangleton Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Henfield Village Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	5	0.0%	0
Holmbush Centre, Upper Shoreham Road, Shoreham-by-Sea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Homebase, Crawley Avenue, West Green, Crawley	0.2%	2	0.0%	0	0.0%	0	1.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, London Road, East Grinstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Lewis, Portfield Way, Chichester	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston-upon-Thames Town Centre	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Patcham Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Portslade Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Purley Way Retail Park, Croydon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Valley Park Retail and Leisure Complex, Purley Way, Croydon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Valley Park, Croydon	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woodmancote Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Internet / catalogue	7.3%	73	12.0%	17	6.5%	9	9.4%	3	3.7%	4	15.2%	24	1.5%	2	15.2%	11	2.0%	1	4.6%	3	0.0%	0
(Don't know)	11.7%	118	11.3%	16	9.8%	13	12.0%	3	11.0%	12	10.7%	17	9.3%	15	19.8%	14	16.6%	6	14.1%	9	11.7%	12
(Don't do this type of shopping)	21.2%	213	17.4%	25	22.1%	29	27.5%	8	20.7%	23	21.7%	34	12.3%	20	13.0%	9	30.4%	11	23.8%	16	36.9%	39
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q17 Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc.)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Building Merchants, Hassocks	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0
Do It All, Burgess Hill	2.0%	20	1.8%	3	9.5%	13	1.6%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	5	0.0%	0	0.0%	0	0.0%	0
Focus, Burgess Hill	1.8%	19	2.0%	3	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	19.9%	7	0.0%	0	0.0%	0
Homebase / B&Q, Shoreham	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	4	3.3%	4
Homebase, Lewes	0.9%	9	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	7	0.0%	0	0.0%	0	0.0%	0
Homebase, Shoreham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1
Ikea, Thurrock	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Tottenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	2.8%	28	0.0%	0	0.0%	0	6.7%	2	6.6%	7	9.5%	15	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	8
London Road Retail Park, CrawleyRetail Park	4.9%	49	0.0%	0	0.0%	0	0.0%	0	12.1%	13	22.5%	35	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longfield Retail Park, Tunbridge Wells	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.9%	9	1.3%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	7
Bexhill-on-Sea Town Centre	0.3%	3	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Brighton Town Centre	3.3%	33	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	29.5%	31
Burgess Hill Town Centre	18.0%	181	50.6%	71	40.8%	54	29.4%	8	1.2%	1	0.0%	0	0.0%	0	10.6%	8	32.3%	12	35.9%	24	2.7%	3
Crawley Town Centre	9.3%	94	2.5%	4	6.0%	8	9.6%	3	29.0%	32	23.4%	36	6.1%	10	1.0%	1	0.0%	0	1.2%	1	0.0%	0
East Grinstead Town Centre	10.6%	107	0.0%	0	0.0%	0	0.0%	0	2.2%	2	10.5%	16	52.4%	84	6.0%	4	0.0%	0	0.0%	0	0.0%	0
Handcross Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.9%	9	0.0%	0	0.6%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	12.2%	4	3.9%	3	0.8%	1
Haywards Heath Town Centre	2.0%	20	6.3%	9	0.0%	0	9.6%	3	3.8%	4	0.0%	0	0.0%	0	4.7%	3	1.0%	0	0.8%	1	0.0%	0
Horley Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	3	0.0%	0
Hove Town Centre	0.9%	9	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	7.8%	8
Lewes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.4%	4	0.6%	1	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.8%	1
Tunbridge Wells Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	1.6%	17	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.4%	15	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
B&Q, Jane Murray Way, Burgess Hill, Haywards Heath	5.4%	55	7.0%	10	18.2%	24	12.9%	4	0.8%	1	0.0%	0	0.0%	0	5.3%	4	8.9%	3	13.4%	9	0.0%	0
B&Q, London Road, Crawley	2.4%	24	1.0%	1	0.0%	0	1.8%	1	14.7%	16	3.6%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Pavilion Retail Park,	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	8

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Lewes Road, Brighton																						
Copthorne Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Currys, London Road, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ditchling Village Centre	0.8%	8	3.9%	6	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.7%	1	0.0%	0	0.0%	0
Dorking Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	5	0.0%	0
Homebase, Crawley Avenue, West Green, Crawley	0.8%	8	0.9%	1	0.0%	0	0.0%	0	3.2%	3	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, London Road, East Grinstead	4.8%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	27.5%	44	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Old Shoreham Road, Hove	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.0%	3
Leatherhead Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Mid Sussex Retail Park, Jane Murray Way, Burgess Hill	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bannister Way, Haywards Heath	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Green Local Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, Bridge Park, London Road, East Grinstead	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	4.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, London Road, Burgess Hill	0.5%	5	0.8%	1	1.3%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.8%	1
Wickes, Peacock Industrial Estate, Davigdor Road, Hove	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Wyevale Garden Centre, Copthorne Road, Pound Hill, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	2.0%	20	3.4%	5	2.2%	3	0.7%	0	1.7%	2	5.1%	8	0.0%	0	1.0%	1	1.9%	1	1.6%	1	0.0%	0
(Don't know)	4.4%	44	4.0%	6	3.0%	4	8.4%	2	4.9%	5	3.5%	5	4.7%	7	5.4%	4	5.1%	2	5.4%	4	4.6%	5
(Don't do this type of shopping)	10.9%	110	9.3%	13	12.0%	16	13.3%	4	13.6%	15	11.6%	18	0.6%	1	11.9%	9	8.2%	3	13.9%	9	21.3%	23
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q18 Where do you normally do most of your household's shopping on all goods for personal care, including electric appliances (e.g. electric razors, hair dryers, curling tongs, electric toothbrushes), non-electric appliances (e.g. scissors, hand razors, bathroom scales), cosmetics, perfume, toothpaste, aftershave, sun tan lotions, etc.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
County Oak Retail Park, Crawley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goldstone Retail Park, Hove	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
London Road Retail Park, CrawleyRetail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pavillion Retail Park, Brighton	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Bexhill-on-Sea Town Centre	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	8.7%	88	2.9%	4	3.3%	4	7.6%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	1	12.8%	5	5.9%	4	63.3%	67
Burgess Hill Town Centre	17.4%	175	9.1%	13	74.3%	98	18.2%	5	1.4%	2	0.0%	0	0.0%	0	9.5%	7	50.8%	18	42.4%	28	3.5%	4
Central London / West End	0.6%	6	0.9%	1	0.0%	0	0.9%	0	0.9%	1	0.0%	0	0.6%	1	2.0%	1	1.0%	0	0.0%	0	1.1%	1
Crawley Town Centre	17.3%	174	2.1%	3	1.2%	2	2.0%	1	62.6%	69	60.9%	94	3.3%	5	0.7%	1	0.0%	0	1.1%	1	0.0%	0
Cuckfield Town Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	13.7%	138	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	10	79.4%	127	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.5%	5	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hassocks Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	3	1.9%	1	0.0%	0
Haywards Heath Town Centre	13.5%	136	65.7%	92	0.0%	0	40.3%	11	9.4%	10	0.0%	0	0.0%	0	28.4%	20	1.0%	0	1.2%	1	0.0%	0
Horley Town Centre	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.9%	9	0.0%	0	0.0%	0	2.3%	1	2.0%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	6.3%	4	0.0%	0
Hove Town Centre	1.0%	10	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	2.9%	2	7.0%	7
Hurstpierpoint Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.6%	1	0.0%	0
Lewes Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.8%	1
Tunbridge Wells Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	4.9%	4	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.3%	17	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	1	1.1%	1
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	7.5%	8
Broadfield Local Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gatwick Airport, Horley	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	5	0.0%	0
Leatherhead Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Newick Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Redhill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bannister Way, Haywards Heath	0.7%	7	2.3%	3	0.7%	1	4.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, East Grinstead	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Storrington Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.5%	3	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.5%	5	0.6%	1	1.7%	2	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2	0.0%	0	0.0%	0
Three Bridges Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Green Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue	6.9%	69	11.1%	16	7.3%	10	5.6%	2	7.9%	9	8.7%	13	1.5%	2	11.8%	8	2.4%	1	7.4%	5	3.4%	4
(Don't know)	3.8%	38	1.9%	3	3.8%	5	5.7%	2	1.8%	2	4.2%	6	8.9%	14	3.1%	2	6.3%	2	2.3%	2	0.0%	0
(Don't do this type of shopping)	5.3%	53	0.9%	1	3.3%	4	10.9%	3	5.0%	6	6.9%	11	0.6%	1	5.2%	4	8.2%	3	12.6%	8	11.4%	12
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q19 Where do you normally do most of your household's shopping for medical goods (e.g. drugs, medicine), other pharmaceutical products (e.g. vitamins, plasters, thermometers, bandages, syringes); and therapeutic appliances/equipment (e.g. spectacles, contact lenses, hearing aids, wheelchairs, etc.).

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
County Oak Retail Park, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	7.6%	77	0.0%	0	2.8%	4	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.1%	1	1.6%	1	66.4%	70
Burgess Hill Town Centre	14.9%	150	3.1%	4	86.5%	115	6.0%	2	0.6%	1	0.0%	0	0.0%	0	2.1%	2	32.3%	12	18.7%	12	3.1%	3
Central London / West End	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Crawley Town Centre	13.3%	133	0.0%	0	1.2%	2	0.0%	0	45.0%	49	51.4%	80	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Town Centre	1.3%	13	0.0%	0	0.0%	0	34.6%	10	0.6%	1	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	14.7%	148	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	13	83.5%	133	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.6%	6	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Handcross Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Hassocks Town Centre	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	52.3%	19	6.8%	4	1.6%	2
Haywards Heath Town Centre	16.6%	167	82.2%	116	0.7%	1	44.0%	13	14.1%	15	0.0%	0	0.0%	0	30.8%	22	1.0%	0	0.0%	0	0.0%	0
Horley Town Centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	5.8%	6	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	0.3%	3	0.0%	0	0.0%	0	0.7%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Hove Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	6.7%	7
Hurstpierpoint Local Centre	2.3%	23	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	31.8%	21	0.0%	0
Lewes Town Centre	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0
Lindfield Town Centre	1.2%	12	4.4%	6	0.0%	0	0.9%	0	2.3%	3	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	1
Tunbridge Wells Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	1.9%	19	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.1%	18	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	3.4%	4
Broadfield Local Centre	1.7%	17	0.0%	0	0.0%	0	0.0%	0	15.5%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buxted Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Copthorne Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Down Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Ditchling Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0
Felbridge Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forest Row Local Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Gatwick Airport, Horley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heathfield Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.3%	18	0.0%	0
Hollingbury Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Leatherhead Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Newick Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4	0.0%	0	0.0%	0	0.0%	0
Northlands Wood Local Centre	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Patcham Local Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	8

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Pound Hill Local Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston Circus Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Redhill Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bannister Way, Haywards Heath	0.7%	7	2.9%	4	0.7%	1	3.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Brooklands Way, East Grinstead	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hazelwick Avenue, Crawley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Hammonds Farm, Jane Murray Way, Burgess Hill	0.1%	1	0.0%	0	0.6%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Three Bridges Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Green Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Internet / catalogue	2.5%	25	1.3%	2	0.0%	0	1.0%	0	3.7%	4	5.1%	8	0.8%	1	7.6%	5	0.0%	0	1.2%	1	3.7%	4
(Don't know)	2.5%	25	3.4%	5	0.0%	0	0.7%	0	1.8%	2	3.4%	5	4.7%	7	3.2%	2	2.1%	1	1.9%	1	1.1%	1
(Don't do this type of shopping)	5.2%	52	0.9%	1	2.7%	4	1.7%	0	4.0%	4	18.7%	29	2.3%	4	5.0%	4	3.1%	1	4.7%	3	1.6%	2
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q20 Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses);

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ikea, Croydon	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Marks & Spencer, Shoreham	0.7%	7	5.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhythe	2.1%	21	0.0%	0	0.6%	1	0.7%	0	6.6%	7	3.4%	5	3.6%	6	1.9%	1	0.7%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Shopping Centre, Thurrock	0.5%	5	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	8.9%	90	9.6%	13	17.1%	23	3.9%	1	1.7%	2	2.6%	4	0.0%	0	3.8%	3	21.4%	8	12.5%	8	26.2%	28
Burgess Hill Town Centre	3.6%	36	1.3%	2	18.8%	25	8.5%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	7.2%	3	4.8%	3	0.8%	1
Central London / West End	0.8%	8	0.6%	1	0.0%	0	1.7%	0	0.0%	0	2.6%	4	0.0%	0	1.9%	1	1.7%	1	0.8%	1	0.0%	0
Crawley Town Centre	14.1%	142	6.5%	9	10.2%	14	12.1%	3	36.9%	40	33.8%	52	11.6%	19	2.2%	2	7.0%	3	1.1%	1	0.0%	0
Croydon Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Town Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Town Centre	3.2%	32	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.9%	3	17.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Guildford Town Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath Town Centre	5.2%	52	22.4%	32	1.9%	3	12.3%	4	1.8%	2	0.0%	0	0.8%	1	8.1%	6	0.7%	0	7.7%	5	0.0%	0
Horley Town Centre	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham Town Centre	1.3%	13	0.0%	0	0.6%	1	4.3%	1	1.4%	2	3.0%	5	0.0%	0	0.7%	1	0.0%	0	6.1%	4	0.0%	0
Hove Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3
Hurstpierpoint Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Lewes Town Centre	0.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Shoreham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tunbridge Wells Town Centre	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	13	4.2%	3	0.0%	0	0.0%	0	0.0%	0
Uckfield Town Centre	0.6%	6	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	5	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.4%	1	1.6%	1	0.0%	0
Abroad	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Asda, Crowhurst Road, off Carden Avenue, Brighton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
County Mall Shopping Centre, Crawley	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Ditchling Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Fountains Retail Park, Tunbridge Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gatwick Airport, Horley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0
Kingston-upon-Thames Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newick Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Salisbury City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Steyning Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Internet / catalogue	9.6%	97	9.4%	13	12.0%	16	11.8%	3	7.1%	8	13.6%	21	10.9%	17	13.2%	9	3.4%	1	4.6%	3	4.2%	4
(Don't know)	9.3%	94	11.4%	16	6.2%	8	12.0%	3	3.6%	4	8.9%	14	15.8%	25	7.4%	5	10.8%	4	7.6%	5	8.2%	9
(Don't do this type of shopping)	34.8%	350	31.1%	44	31.3%	41	32.1%	9	33.0%	36	28.1%	43	24.2%	39	43.7%	31	41.8%	15	48.1%	32	55.9%	59
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q21 On which day of the week do you typically do your shopping? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Monday	8.4%	85	11.2%	16	10.5%	14	6.9%	2	7.8%	9	5.6%	9	9.5%	15	8.1%	6	9.2%	3	7.8%	5	6.2%	7
Tuesday	6.0%	60	8.4%	12	3.6%	5	6.6%	2	7.0%	8	8.4%	13	2.7%	4	6.7%	5	9.3%	3	3.2%	2	6.3%	7
Wednesday	7.3%	73	12.2%	17	9.4%	12	7.3%	2	3.4%	4	6.7%	10	4.7%	7	7.0%	5	11.6%	4	3.9%	3	7.5%	8
Thursday	12.2%	123	14.3%	20	8.7%	12	14.5%	4	14.8%	16	11.2%	17	7.7%	12	18.1%	13	19.5%	7	12.4%	8	12.0%	13
Friday	15.9%	160	15.0%	21	19.7%	26	8.8%	3	13.2%	14	17.5%	27	19.3%	31	18.5%	13	11.4%	4	9.5%	6	13.6%	14
Saturday	18.5%	186	15.4%	22	15.3%	20	14.2%	4	25.3%	28	20.9%	32	22.2%	36	12.0%	9	9.4%	3	13.8%	9	21.6%	23
Sunday	6.8%	68	7.3%	10	9.6%	13	11.6%	3	4.6%	5	9.2%	14	7.7%	12	3.9%	3	3.4%	1	3.1%	2	3.8%	4
(Don't know / varies)	44.9%	452	43.9%	62	34.7%	46	39.1%	11	44.2%	48	44.2%	68	44.3%	71	52.4%	38	56.0%	20	54.2%	36	48.6%	52
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

MeanScore: Visits per year (including those who said 'never')

Q22 How often do you or your household visit East Grinstead for your non food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	16.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4-6 days a week	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	3.2%	32	0.0%	0	1.2%	2	0.0%	0	0.0%	0	3.2%	5	15.2%	24	2.4%	2	0.0%	0	0.0%	0	0.0%	0
One days a week	6.3%	64	0.0%	0	1.6%	2	0.0%	0	2.0%	2	9.2%	14	26.8%	43	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Every two weeks	4.0%	40	0.0%	0	1.0%	1	0.0%	0	1.2%	1	5.4%	8	16.3%	26	4.3%	3	0.7%	0	0.0%	0	0.0%	0
Monthly	4.9%	49	1.8%	3	1.0%	1	0.7%	0	9.5%	10	7.8%	12	8.8%	14	8.7%	6	6.7%	2	0.0%	0	0.0%	0
Once every two months	2.0%	21	0.0%	0	0.0%	0	1.0%	0	6.2%	7	3.4%	5	2.8%	4	4.1%	3	0.0%	0	1.2%	1	0.0%	0
Three-four times a year	3.7%	37	4.6%	6	0.0%	0	2.7%	1	5.5%	6	10.2%	16	0.0%	0	6.5%	5	7.1%	3	1.1%	1	0.0%	0
Once a year	2.8%	28	6.6%	9	2.2%	3	3.1%	1	3.8%	4	3.7%	6	0.0%	0	1.9%	1	2.6%	1	3.8%	3	0.0%	0
Less Often	1.9%	19	3.0%	4	1.0%	1	0.9%	0	0.8%	1	0.5%	1	2.2%	4	1.7%	1	2.5%	1	7.4%	5	0.8%	1
Never	66.6%	670	84.1%	118	91.8%	122	91.6%	26	71.0%	78	54.5%	84	1.9%	3	67.2%	48	80.4%	29	85.3%	56	99.2%	105
(Don't know / varies)	0.3%	3	0.0%	0	0.5%	1	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Mean:		*23.36*		*0.46*		*2.78*		*0.27*		*3.11*		*14.94*		*123.79*		*7.43*		*1.28*		*0.18*		*0.00*
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q23 What do you like about East Grinstead? [MR]
Those who visit East Grinstead at Q22:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing / very little	26.4%	89	27.2%	6	11.5%	1	27.1%	1	31.7%	10	34.2%	24	22.2%	35	27.7%	7	43.4%	3	20.5%	2	0.0%	0
Attractive environment / nice place	15.6%	52	15.6%	3	13.1%	1	40.0%	1	0.0%	0	12.5%	9	20.6%	32	12.6%	3	12.6%	1	7.9%	1	100.0%	1
Close to friends or relatives	4.7%	16	16.5%	4	0.0%	0	0.0%	0	12.9%	4	7.5%	5	0.0%	0	8.6%	2	0.0%	0	7.3%	1	0.0%	0
Close to home	22.6%	76	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	44.4%	70	9.4%	2	0.0%	0	0.0%	0	0.0%	0
Close to work	3.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Compact	5.5%	19	0.0%	0	14.6%	2	0.0%	0	10.1%	3	8.2%	6	5.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Easy to park	3.7%	13	0.0%	0	0.0%	0	0.0%	0	6.9%	2	4.1%	3	3.1%	5	10.9%	3	0.0%	0	0.0%	0	0.0%	0
Good facilities	2.1%	7	0.0%	0	7.5%	1	0.0%	0	4.2%	1	2.5%	2	1.6%	2	2.2%	1	3.6%	0	0.0%	0	0.0%	0
Good food stores	0.9%	3	0.0%	0	11.5%	1	0.0%	0	3.0%	1	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0
Good pubs, cafés or restaurants	3.1%	10	0.0%	0	0.0%	0	0.0%	0	4.2%	1	4.9%	3	3.1%	5	0.0%	0	7.3%	1	0.0%	0	0.0%	0
Good range of non-food shops	8.6%	29	12.8%	3	11.5%	1	0.0%	0	31.2%	10	2.9%	2	4.3%	7	22.0%	5	3.6%	0	5.3%	1	0.0%	0
Makes a change from other places	2.9%	10	7.9%	2	5.6%	1	21.0%	1	4.2%	1	2.5%	2	0.0%	0	4.5%	1	30.7%	2	5.3%	1	0.0%	0
Other particular shops or stores	1.6%	6	0.0%	0	11.5%	1	0.0%	0	2.7%	1	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quiet	4.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	5	5.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traditional	2.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	2.5%	4	0.0%	0	9.6%	1	0.0%	0	0.0%	0
Traffic-free shopping centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	1.9%	3	6.6%	2	0.0%	0	0.0%	0	0.0%	0
A specific shop	2.7%	9	7.9%	2	0.0%	0	0.0%	0	0.0%	0	7.4%	5	0.0%	0	9.3%	2	0.0%	0	0.0%	0	0.0%	0
A specific attraction	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	5.3%	1	0.0%	0
Friendly people	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of independent shops	1.2%	4	0.0%	0	7.5%	1	11.9%	0	0.0%	0	2.5%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / nothing in particular)	6.8%	23	15.9%	4	17.1%	2	8.1%	0	0.0%	0	4.1%	3	5.3%	8	2.9%	1	0.0%	0	53.7%	5	0.0%	0
Weighted base:		336		22		11		2		32		70		157		24		7		10		1
Sample:		269		17		11		10		22		55		99		35		10		9		1

Q24 What could be improved about East Grinstead that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing	48.3%	486	59.3%	83	57.0%	75	49.4%	14	49.4%	54	39.6%	61	11.2%	18	61.2%	44	54.4%	20	81.5%	54	58.5%	62
Better access by road	2.6%	26	0.8%	1	0.6%	1	2.1%	1	1.8%	2	9.5%	15	0.8%	1	3.4%	2	4.6%	2	1.6%	1	0.0%	0
Better public transport	2.2%	22	3.6%	5	6.2%	8	2.8%	1	2.7%	3	1.3%	2	0.0%	0	0.7%	1	0.7%	0	2.4%	2	0.8%	1
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Facilities which would assist you if shopping with children	0.3%	3	0.8%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	2.5%	26	0.0%	0	1.0%	1	3.7%	1	2.1%	2	1.7%	3	7.4%	12	7.8%	6	0.0%	0	1.6%	1	0.0%	0
Jewellery / food markets / other events	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	8.3%	83	2.9%	4	1.1%	1	0.0%	0	5.6%	6	4.7%	7	38.3%	61	1.7%	1	1.4%	1	0.0%	0	1.1%	1
More / better entertainment / eating places	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
More / better food shops	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.1%	3	9.2%	15	2.1%	1	1.4%	1	0.0%	0	0.0%	0
More / better parking	4.4%	44	0.8%	1	0.7%	1	2.0%	1	6.2%	7	11.8%	18	6.6%	11	7.1%	5	0.0%	0	1.6%	1	0.0%	0
More / better pedestrianised streets	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.1%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats / flower displays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.3%	3	0.0%	0	0.6%	1	0.0%	0	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
More advertising	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	9.3%	94	3.3%	5	2.2%	3	2.6%	1	8.6%	9	19.3%	30	25.6%	41	4.0%	3	1.0%	0	0.0%	0	1.9%	2
Protection from the weather (i.e.. Covered shopping malls)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.8%	18	3.7%	5	0.0%	0	0.0%	0	0.0%	0	2.6%	4	4.5%	7	0.0%	0	0.0%	0	1.2%	1	0.8%	1
Cheaper parking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Closer to home	0.5%	5	1.4%	2	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	2.1%	1	0.0%	0
Complete refurbishment of the town centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.1%	2	0.8%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Less cafés / restaurants	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	11	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Less charity shops	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.7%	1	0.0%	0	0.0%	0	0.0%	0
More / better clothing shops	2.0%	20	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.5%	1	11.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent shops	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	6.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open a Marks & Spencer store	0.7%	7	0.0%	0	0.0%	0	1.1%	0	0.0%	0	2.1%	3	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reduce traffic congestion	1.4%	14	0.0%	0	2.2%	3	0.0%	0	0.0%	0	1.7%	3	4.9%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
(Don’t know)	19.1%	192	24.1%	34	30.2%	40	25.7%	7	25.0%	27	7.7%	12	0.8%	1	15.3%	11	34.7%	13	9.6%	6	38.1%	40
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

MeanScore: Visits per year (including those who said 'never')

Q25 How often do you or your household visit Haywards Heath for your non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	1.9%	19	10.1%	14	1.2%	2	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.9%	2
4-6 days a week	1.2%	12	6.4%	9	0.0%	0	1.4%	0	1.4%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	5.2%	52	21.3%	30	2.1%	3	14.8%	4	3.9%	4	0.0%	0	0.0%	0	13.4%	10	2.4%	1	0.0%	0	0.0%	0
One days a week	7.7%	78	23.1%	33	3.1%	4	29.7%	8	12.0%	13	0.0%	0	0.6%	1	17.2%	12	12.9%	5	2.4%	2	0.0%	0
Every two weeks	7.7%	78	21.0%	30	10.1%	13	19.2%	5	2.6%	3	4.9%	8	0.0%	0	20.2%	14	4.6%	2	4.5%	3	0.0%	0
Monthly	10.1%	102	8.6%	12	20.0%	27	16.0%	5	3.7%	4	12.3%	19	2.0%	3	10.1%	7	32.1%	12	13.7%	9	4.2%	4
Once every two months	5.2%	52	1.2%	2	17.0%	23	8.5%	2	0.8%	1	0.8%	1	2.8%	4	4.9%	4	6.0%	2	13.7%	9	4.1%	4
Three-four times a year	5.7%	57	0.0%	0	8.8%	12	1.8%	1	8.1%	9	3.7%	6	8.9%	14	9.0%	6	10.2%	4	7.1%	5	1.1%	1
Once a year	3.3%	33	0.0%	0	4.8%	6	0.0%	0	2.8%	3	1.6%	2	2.7%	4	2.7%	2	4.3%	2	8.3%	5	7.5%	8
Less Often	1.0%	10	0.0%	0	2.7%	4	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.7%	0	0.8%	1	1.1%	1
Never	49.6%	499	4.6%	7	27.8%	37	7.6%	2	64.1%	70	76.7%	119	80.1%	128	18.4%	13	24.8%	9	47.3%	31	78.5%	83
(Don't know)	1.4%	14	3.5%	5	2.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	2.6%	2	2.0%	1	1.6%	1	1.6%	2
Mean:		*24.73*		*103.67*		*15.58*		*49.41*		*16.61*		*2.94*		*1.04*		*38.15*		*16.02*		*8.19*		*7.99*
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q26 What do you like about Haywards Heath? [MR]
Those who visit Haywards Heath at Q25:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing / very little	18.7%	95	11.4%	15	15.2%	15	24.4%	6	12.9%	5	28.7%	10	15.1%	5	19.3%	11	33.1%	9	27.9%	10	35.1%	8
Attractive environment / nice place	9.0%	45	11.1%	15	2.2%	2	10.0%	3	4.0%	2	27.5%	10	18.4%	6	5.8%	3	6.3%	2	6.0%	2	4.9%	1
Close to friends or relatives	1.1%	6	0.0%	0	0.6%	1	1.1%	0	0.0%	0	0.0%	0	4.1%	1	0.9%	1	2.3%	1	4.0%	1	3.6%	1
Close to home	30.6%	155	64.0%	86	12.5%	12	49.1%	13	37.5%	15	0.0%	0	0.0%	0	46.5%	27	3.5%	1	4.6%	2	0.0%	0
Close to work	1.7%	9	2.7%	4	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	2.0%	1	7.5%	2
Compact	6.3%	32	18.0%	24	0.0%	0	0.7%	0	2.4%	1	4.8%	2	0.0%	0	3.6%	2	3.2%	1	3.0%	1	3.6%	1
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.1%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	2.3%	12	3.6%	5	1.8%	2	0.7%	0	0.0%	0	3.4%	1	0.0%	0	4.4%	3	0.0%	0	0.0%	0	5.3%	1
Easy to park	3.5%	18	3.8%	5	2.2%	2	7.3%	2	6.4%	3	3.4%	1	0.0%	0	6.3%	4	4.8%	1	0.0%	0	0.0%	0
Good facilities	1.9%	10	2.0%	3	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	4.2%	1	3.9%	1	0.0%	0
Good food stores	2.7%	14	1.3%	2	0.9%	1	1.9%	1	4.8%	2	2.3%	1	0.0%	0	3.8%	2	9.3%	3	6.8%	2	3.6%	1
Good pubs, cafés or restaurants	3.8%	19	1.3%	2	1.5%	1	0.7%	0	16.0%	6	8.9%	3	4.1%	1	5.1%	3	2.9%	1	3.5%	1	0.0%	0
Good range of non-food shops	14.3%	72	5.5%	7	26.1%	25	4.2%	1	9.8%	4	2.3%	1	34.0%	11	14.2%	8	23.6%	6	19.2%	7	8.9%	2
Makes a change from other places	2.7%	14	0.0%	0	4.8%	5	0.7%	0	0.0%	0	4.8%	2	7.9%	2	0.0%	0	2.2%	1	1.5%	1	15.5%	4
Quiet	1.1%	6	0.6%	1	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	1.5%	1	12.1%	3
Safe and secure	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The market	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Traditional	0.5%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Traffic-free shopping centre	0.8%	4	0.6%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.9%	0	0.0%	0	7.2%	2
Other	2.8%	14	3.1%	4	2.7%	3	2.6%	1	0.0%	0	11.6%	4	0.0%	0	2.1%	1	0.9%	0	3.0%	1	0.0%	0
A specific shop	0.3%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.4%	0	0.0%	0	0.0%	0
A specific attraction	0.6%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
99p store	0.6%	3	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Good layout / spread out	0.7%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Good parking facilities	0.2%	1	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Good range of independent shops	0.5%	3	0.0%	0	0.0%	0	1.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Marks & Spencer store	6.6%	33	1.7%	2	12.3%	12	2.7%	1	13.8%	5	0.0%	0	11.0%	3	10.0%	6	2.8%	1	5.2%	2	5.3%	1
Next store	1.2%	6	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2	0.0%	0	0.0%	0
Sainsbury's store	1.1%	6	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	3.8%	1	3.0%	2	2.5%	1	0.0%	0	4.9%	1
(Don't know)	5.4%	27	1.5%	2	13.6%	13	0.7%	0	8.9%	3	8.0%	3	6.9%	2	0.0%	0	3.8%	1	7.5%	3	0.0%	0
Weighted base:		507		134		96		26		39		36		32		58		27		35		23
Sample:		573		96		78		92		39		19		23		80		73		51		22

Q27 What could be improved about Haywards Heath that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing	48.8%	491	19.0%	27	39.1%	52	20.0%	6	50.7%	55	72.1%	112	61.2%	98	45.2%	32	29.1%	11	54.9%	36	58.6%	62
More / better parking	5.5%	55	8.8%	12	8.5%	11	14.3%	4	8.1%	9	0.5%	1	1.6%	3	8.2%	6	13.5%	5	6.9%	5	0.0%	0
Free car parking	3.9%	39	7.2%	10	3.5%	5	13.9%	4	3.5%	4	0.0%	0	0.8%	1	12.9%	9	8.8%	3	3.7%	2	0.0%	0
Better public transport	1.9%	19	0.8%	1	3.9%	5	3.1%	1	2.7%	3	1.3%	2	1.5%	2	0.0%	0	1.4%	1	2.4%	2	2.3%	2
More / better comparison retailers (i.e. non-food shops)	6.2%	62	13.3%	19	13.5%	18	5.9%	2	5.8%	6	4.6%	7	0.6%	1	10.2%	7	4.6%	2	0.8%	1	0.0%	0
More / better food shops	3.2%	32	6.1%	9	4.5%	6	5.5%	2	6.1%	7	0.7%	1	0.0%	0	8.4%	6	5.6%	2	0.0%	0	0.0%	0
More national multiple shops / High Street shops	14.1%	141	33.4%	47	14.3%	19	25.6%	7	15.8%	17	7.5%	12	2.1%	3	23.4%	17	23.8%	9	12.3%	8	2.3%	2
Jewellery / food markets / other events	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Facilities which would assist you if shopping with children	1.0%	10	6.8%	10	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Protection from the weather (i.e. covered shopping malls)	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Cleaner streets	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
More / better pedestrianised streets	1.3%	13	5.4%	8	2.8%	4	1.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.0%	0	0.0%	0	0.0%	0
More / better services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better entertainment / eating places	0.9%	9	2.5%	4	0.0%	0	0.0%	0	1.7%	2	1.1%	2	0.0%	0	0.0%	0	0.7%	0	1.9%	1	0.0%	0
More / better seats / flower displays	0.1%	1	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better access by road	0.7%	7	0.9%	1	2.2%	3	0.7%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	2.4%	2	0.0%	0
More advertising	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Other	2.6%	26	7.3%	10	5.9%	8	1.4%	0	1.4%	2	1.1%	2	0.6%	1	1.7%	1	0.0%	0	3.7%	2	0.0%	0
A complete refurbishment of the town centre	0.5%	5	1.7%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	1.9%	1	0.0%	0
Better layout of shops (i.e. more compact)	0.7%	7	0.0%	0	0.6%	1	2.6%	1	1.4%	2	0.0%	0	0.0%	0	2.7%	2	0.7%	0	1.9%	1	0.0%	0
Bigger / better Marks & Spencer store	0.3%	3	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.0%	0	1.7%	1	1.5%	1	0.8%	1	0.0%	0
Finish roadworks	0.3%	3	0.9%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.2%	1	0.0%	0
Less charity shops	0.6%	6	4.0%	6	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion	0.4%	4	1.5%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0
More children's clothes shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More clothes and shoe shops	1.1%	11	0.9%	1	0.0%	0	5.8%	2	0.0%	0	0.8%	1	1.2%	2	0.7%	1	0.0%	0	6.6%	4	0.0%	0
More independent / specialist shops	1.1%	11	1.5%	2	0.5%	1	2.6%	1	0.0%	0	0.0%	0	1.5%	2	0.7%	1	0.0%	0	0.0%	0	4.1%	4
More / better shops in general	1.2%	12	2.9%	4	5.4%	7	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Open a cinema	0.4%	4	2.4%	3	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open a John Lewis store	0.4%	4	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Open a Waitrose supermarket	0.4%	4	1.5%	2	0.0%	0	1.1%	0	0.0%	0	0.7%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	15.3%	154	2.5%	3	9.5%	13	11.2%	3	17.9%	20	13.3%	21	31.2%	50	4.5%	3	17.8%	6	7.3%	5	28.8%	31
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

MeanScore: Visits per year (including those who said 'never')

Q28 How often do you or your household visit Burgess Hill for your non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	1.5%	15	0.0%	0	9.3%	12	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.2%	1	1.1%	1
4-6 days a week	1.1%	12	0.0%	0	5.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	2	2.6%	2	0.0%	0
2-3 days a week	4.2%	42	5.5%	8	15.9%	21	5.0%	1	0.6%	1	0.0%	0	1.2%	2	2.8%	2	9.9%	4	5.6%	4	0.0%	0
One days a week	10.3%	104	7.6%	11	31.9%	42	20.7%	6	0.0%	0	4.6%	7	0.0%	0	6.4%	5	41.0%	15	23.7%	16	2.7%	3
Every two weeks	8.6%	86	15.2%	21	21.3%	28	11.8%	3	0.6%	1	5.3%	8	0.0%	0	13.2%	9	11.2%	4	9.7%	6	4.2%	4
Monthly	9.8%	99	25.1%	35	6.5%	9	17.4%	5	10.1%	11	2.5%	4	0.8%	1	16.4%	12	17.5%	6	13.2%	9	6.7%	7
Once every two months	2.8%	28	1.4%	2	3.9%	5	7.0%	2	1.2%	1	0.7%	1	1.4%	2	4.6%	3	3.8%	1	13.1%	9	0.8%	1
Three-four times a year	3.6%	36	7.3%	10	0.0%	0	5.3%	2	4.3%	5	1.9%	3	4.2%	7	5.3%	4	1.4%	1	3.5%	2	3.0%	3
Once a year	3.1%	31	7.7%	11	0.5%	1	2.3%	1	1.8%	2	2.7%	4	1.2%	2	3.5%	3	1.0%	0	1.9%	1	6.8%	7
Less often	1.4%	14	2.1%	3	0.6%	1	0.0%	0	1.4%	2	0.0%	0	2.1%	3	3.6%	3	0.0%	0	0.0%	0	2.6%	3
Never	52.6%	529	26.0%	37	4.3%	6	28.9%	8	79.4%	87	82.4%	128	89.2%	142	44.1%	32	5.0%	2	22.5%	15	68.8%	73
(Don't know)	1.0%	10	2.1%	3	0.5%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	3.1%	2	3.4%	4
Mean:		*23.18*		*18.83*		*92.38*		*28.94*		*2.38*		*4.17*		*1.84*		*12.91*		*60.66*		*36.76*		*7.94*
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q29 What do you like about Burgess Hill? [MR]
Those who visit Burgess Hill at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing / very little	24.7%	118	19.4%	20	25.9%	33	35.6%	7	28.8%	6	15.4%	4	28.3%	5	28.4%	11	30.8%	11	25.8%	13	20.6%	7
Attractive environment / nice place	5.8%	28	2.9%	3	2.6%	3	3.3%	1	4.2%	1	12.1%	3	15.8%	3	8.0%	3	8.6%	3	3.5%	2	17.4%	6
Close to friends or relatives	3.4%	16	1.1%	1	0.0%	0	1.0%	0	4.2%	1	32.0%	9	7.5%	1	1.3%	1	0.8%	0	1.4%	1	6.7%	2
Close to home	23.7%	113	11.7%	12	49.0%	62	12.6%	3	0.0%	0	0.0%	0	0.0%	0	26.5%	11	29.8%	10	22.7%	12	10.9%	4
Close to work	0.7%	3	1.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Compact	5.1%	25	6.6%	7	1.9%	2	1.9%	0	0.0%	0	0.0%	0	7.0%	1	8.6%	3	6.3%	2	8.5%	4	11.1%	4
Easy to get to by bike	0.5%	3	0.0%	0	0.8%	1	8.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.7%	3	0.0%	0	0.0%	0	9.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	2.0%	1	0.0%	0
Easy to get to by car	2.4%	12	1.7%	2	2.4%	3	9.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	5	0.0%	0
Easy to park	6.1%	29	2.5%	3	4.9%	6	10.0%	2	10.9%	2	0.0%	0	0.0%	0	6.3%	3	11.5%	4	7.0%	4	17.0%	6
Good facilities	2.3%	11	3.6%	4	2.4%	3	1.0%	0	0.0%	0	6.4%	2	0.0%	0	0.0%	0	1.5%	1	3.0%	2	0.0%	0
Good food stores	3.7%	18	7.7%	8	1.6%	2	0.0%	0	2.8%	1	0.0%	0	0.0%	0	2.5%	1	10.5%	4	3.0%	2	2.5%	1
Good pubs, cafés or restaurants	2.1%	10	2.0%	2	3.9%	5	2.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.5%	1	0.0%	0	3.6%	1
Good range of non-food shops	12.6%	60	25.5%	27	8.9%	11	11.5%	2	9.9%	2	0.0%	0	7.5%	1	14.9%	6	13.9%	5	7.9%	4	5.0%	2
Makes a change from other places	2.0%	10	5.6%	6	0.0%	0	2.4%	0	0.0%	0	0.0%	0	13.5%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Quiet	2.0%	10	0.0%	0	0.0%	0	0.0%	0	30.8%	7	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.0%	1	5.0%	2
Safe and secure	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The market	0.6%	3	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	3.0%	2	0.0%	0
Traditional	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Traffic-free shopping centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.5%	1
Other	2.4%	11	1.1%	1	1.5%	2	7.3%	1	0.0%	0	3.1%	1	0.0%	0	1.3%	1	4.2%	1	3.4%	2	6.7%	2
A specific shop	0.7%	4	0.0%	0	1.0%	1	0.0%	0	2.8%	1	4.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
A specific attraction	1.8%	9	8.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Everything	0.4%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.0%	1	0.0%	0
Familiarity	0.4%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Free parking	1.4%	7	1.1%	1	0.7%	1	2.9%	1	0.0%	0	0.0%	0	7.5%	1	1.7%	1	1.9%	1	2.4%	1	0.0%	0
Has a B&Q store	0.8%	4	1.2%	1	0.0%	0	0.0%	0	0.0%	0	7.2%	2	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Has a Lidl supermarket	0.7%	3	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Has a Store 21	1.9%	9	1.1%	1	0.0%	0	0.0%	0	3.9%	1	25.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has a Waitrose supermarket	3.4%	16	4.6%	5	1.6%	2	3.3%	1	5.9%	1	0.0%	0	7.5%	1	8.3%	3	2.3%	1	1.0%	1	3.6%	1
Has a Wilkinson's store	2.1%	10	6.0%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0	1.0%	1	2.5%	1
Has an Argos store	1.0%	5	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0
Undercover shops	0.3%	2	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.8%	0	0.0%	0	0.0%	0
(Don't know)	3.2%	15	1.7%	2	4.5%	6	1.4%	0	6.7%	2	4.2%	1	5.1%	1	0.0%	0	1.6%	1	2.6%	1	6.7%	2
Weighted base:		477		104		127		20		23		27		17		40		35		51		33
Sample:		546		76		95		74		21		13		12		51		94		76		34

Q30 What could be improved about Burgess Hill that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing	55.1%	554	52.3%	74	9.8%	13	45.7%	13	69.6%	76	72.8%	113	66.0%	105	65.2%	47	30.8%	11	47.8%	32	66.7%	71
More / better parking	1.4%	14	2.2%	3	1.0%	1	4.8%	1	1.7%	2	0.0%	0	0.0%	0	3.2%	2	2.7%	1	4.2%	3	0.0%	0
Free car parking	4.7%	47	3.7%	5	15.7%	21	6.4%	2	0.9%	1	0.0%	0	0.0%	0	11.1%	8	8.6%	3	11.5%	8	0.0%	0
Better public transport	0.8%	8	0.0%	0	1.2%	2	1.4%	0	2.1%	2	1.9%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	7.7%	78	8.1%	11	31.7%	42	4.0%	1	2.7%	3	4.6%	7	1.2%	2	8.9%	6	7.7%	3	1.9%	1	1.1%	1
More / better food shops	2.0%	20	1.3%	2	7.5%	10	4.0%	1	0.8%	1	0.0%	0	0.0%	0	0.7%	1	6.7%	2	2.3%	2	1.6%	2
More national multiple shops / High Street shops	13.6%	137	19.3%	27	43.0%	57	18.0%	5	6.0%	7	6.2%	10	1.9%	3	13.8%	10	18.3%	7	9.2%	6	5.7%	6
Jewellery / food markets / other events	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Facilities which would assist you if shopping with children	0.9%	9	0.0%	0	5.2%	7	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Protection from the weather (i.e. covered shopping malls)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets	0.4%	4	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.8%	1
More / better pedestrianised streets	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.2%	2	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better entertainment / eating places	0.6%	6	1.3%	2	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
More / better seats / flower displays	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better signposting	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better access by road	0.3%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.7%	1	0.8%	1	0.0%	0
More advertising	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.6%	17	2.1%	3	6.8%	9	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	3.5%	2	1.1%	1
A complete refurbishment of the town centre	2.0%	20	8.1%	11	0.0%	0	2.0%	1	1.4%	2	0.0%	0	0.0%	0	0.7%	1	3.7%	1	4.1%	3	2.2%	2
Less cafés / restaurants	1.1%	11	0.0%	0	6.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	6.7%	2	0.0%	0	0.0%	0
Less vacant shops	1.0%	10	0.0%	0	4.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	8.9%	3	0.8%	1	0.0%	0
More / better shops in general	3.1%	31	4.6%	7	8.7%	11	2.7%	1	0.0%	0	0.0%	0	2.6%	4	0.0%	0	3.4%	1	9.1%	6	1.1%	1
More independent / specialist shops	1.0%	10	0.6%	1	5.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Open a John Lewis store	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
(Don’t know)	14.6%	147	6.7%	9	0.9%	1	16.1%	5	19.1%	21	17.5%	27	27.5%	44	9.3%	7	9.5%	3	8.7%	6	22.5%	24
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q31 If shopping with children, are there any facilities which would assist you? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	28.5%	287	29.7%	42	29.0%	38	39.7%	11	30.5%	33	35.6%	55	37.2%	59	20.5%	15	17.7%	6	12.2%	8	16.9%	18
A drop-in crèche	2.0%	20	2.2%	3	8.7%	11	1.4%	0	1.2%	1	0.7%	1	1.2%	2	0.0%	0	0.7%	0	1.1%	1	0.0%	0
Family parking spaces	6.2%	62	5.2%	7	10.8%	14	3.8%	1	7.9%	9	5.8%	9	4.3%	7	3.7%	3	20.4%	7	3.8%	2	2.4%	3
A specific retailer or café	0.9%	9	0.0%	0	5.8%	8	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.5%	25	0.9%	1	0.0%	0	3.8%	1	11.1%	12	5.7%	9	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.8%	1
Better toilet / baby-changing facilities	2.0%	20	3.8%	5	1.6%	2	1.4%	0	2.8%	3	1.1%	2	0.8%	1	1.0%	1	2.2%	1	6.6%	4	0.0%	0
More / better play areas	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	1.4%	2	0.0%	0	0.7%	0	1.1%	1	0.0%	0
More children's clothes shops	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.2%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Open a children's café	0.4%	4	0.0%	0	0.6%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0	0.0%	0
(Don't shop with children)	57.4%	578	59.4%	84	48.7%	64	52.4%	15	50.2%	55	49.9%	77	46.8%	75	74.9%	54	59.1%	22	73.4%	49	79.1%	84
(Don't know)	1.7%	17	0.0%	0	0.7%	1	1.7%	0	0.8%	1	0.0%	0	7.3%	12	0.0%	0	1.4%	1	2.1%	1	0.8%	1
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Q32X Do you or your household ever visit any of the following leisure attractions? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bingo / casino / bookmaker	2.1%	21	0.8%	1	1.3%	2	5.8%	2	4.8%	5	1.9%	3	1.6%	2	4.1%	3	1.4%	1	1.9%	1	1.1%	1
Cinema	41.9%	421	43.0%	60	37.9%	50	53.9%	15	48.1%	53	47.9%	74	42.9%	68	47.8%	34	53.5%	20	25.5%	17	27.4%	29
Gym / health club / sports facility	32.6%	328	44.7%	63	35.2%	47	32.1%	9	19.5%	21	31.7%	49	45.8%	73	29.6%	21	22.0%	8	17.6%	12	23.7%	25
Theatre/ concert / music venue	34.3%	345	24.3%	34	25.2%	33	47.8%	14	31.3%	34	47.9%	74	32.8%	52	42.1%	30	45.1%	16	24.9%	17	38.0%	40
Museum / gallery or place of historical / cultural interest	27.5%	277	20.6%	29	21.7%	29	32.5%	9	24.0%	26	31.0%	48	28.9%	46	42.6%	31	43.3%	16	19.9%	13	28.3%	30
Pub/ bar / nightclub	39.1%	393	31.0%	44	34.1%	45	41.4%	12	33.6%	37	54.6%	85	41.6%	66	48.9%	35	60.3%	22	24.8%	16	29.7%	32
Restaurant / café	53.8%	541	46.1%	65	52.7%	70	66.5%	19	54.4%	60	64.8%	100	45.5%	73	61.1%	44	79.5%	29	33.7%	22	56.7%	60
Family entertainment (e.g. tenpin bowling, skating rink)	20.1%	202	15.7%	22	11.9%	16	22.6%	6	31.8%	35	34.8%	54	16.0%	25	24.2%	17	21.1%	8	6.1%	4	13.4%	14
Other activity	2.7%	27	3.5%	5	0.0%	0	3.1%	1	3.8%	4	1.7%	3	4.3%	7	4.6%	3	0.7%	0	0.0%	0	3.8%	4
(None of these)	21.0%	211	18.6%	26	19.9%	26	15.7%	4	25.6%	28	18.0%	28	16.3%	26	24.2%	17	8.9%	3	44.2%	29	21.1%	22
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

MeanScore: Visits per year (including those who said 'don't go')

Q32A How often do you normally visit for bingo, casino or bookmakers?
Those who visit 'Bingo',' Casino' or 'Bookmaker' facilities at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	24.8%	5	0.0%	0	0.0%	0	0.0%	0	57.8%	3	0.0%	0	0.0%	0	0.0%	0	100.0%	1	42.4%	1	100.0%	1
Once a fortnight	14.2%	3	0.0%	0	0.0%	0	100.0%	2	25.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	23.3%	5	0.0%	0	52.0%	1	0.0%	0	0.0%	0	60.5%	2	0.0%	0	76.6%	2	0.0%	0	0.0%	0	0.0%	0
Once every 2 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every 3-6 months	13.5%	3	0.0%	0	48.0%	1	0.0%	0	0.0%	0	0.0%	0	52.0%	1	0.0%	0	0.0%	0	57.6%	1	0.0%	0
Once a year	14.3%	3	100.0%	1	0.0%	0	0.0%	0	0.0%	0	39.5%	1	0.0%	0	23.4%	1	0.0%	0	0.0%	0	0.0%	0
Less often	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	48.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't go	4.2%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*19.95*		*1.00*		*7.68*		*26.00*		*36.71*		*7.66*		*1.80*		*9.42*		*52.00*		*23.79*		*52.00*
Weighted base:		21		1		2		2		5		3		2		3		1		1		1
Sample:		21		1		2		1		4		2		2		4		2		2		1

MeanScore: Visits per year (including those who said 'don't go')

Q32B How often do you normally visit the cinema?
Those who visit 'Cinema' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	3.3%	14	1.4%	1	3.2%	2	6.8%	1	3.2%	2	7.0%	5	0.0%	0	3.5%	1	1.3%	0	4.5%	1	3.8%	1
Once a fortnight	7.6%	32	6.3%	4	4.8%	2	4.7%	1	10.8%	6	16.8%	12	3.4%	2	7.4%	3	2.0%	0	0.0%	0	5.9%	2
Once a month	28.4%	119	26.9%	16	19.7%	10	23.2%	4	34.9%	18	20.1%	15	31.1%	21	37.0%	13	44.1%	9	27.8%	5	31.6%	9
Once every 2 months	22.9%	96	39.6%	24	33.4%	17	17.7%	3	16.6%	9	13.0%	10	21.4%	15	32.3%	11	18.1%	4	31.6%	5	0.0%	0
Once every 3-6 months	31.2%	131	18.3%	11	33.4%	17	37.0%	6	28.6%	15	33.6%	25	42.2%	29	15.6%	5	25.1%	5	29.9%	5	47.2%	14
Once a year	4.1%	17	5.6%	3	3.7%	2	10.7%	2	2.9%	2	5.6%	4	1.9%	1	2.0%	1	8.1%	2	0.0%	0	4.5%	1
Less often	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	1.3%	0	6.2%	1	0.0%	0
Don't go	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.9%	8	1.9%	1	1.8%	1	0.0%	0	3.0%	2	2.3%	2	0.0%	0	2.2%	1	0.0%	0	0.0%	0	7.0%	2
Mean:		*9.62*		*8.75*		*8.46*		*9.80*		*10.88*		*12.57*		*7.19*		*10.85*		*8.42*		*8.51*		*9.44*
Weighted base:		421		60		50		15		53		74		68		34		20		17		29
Sample:		390		37		37		46		44		48		45		39		43		27		24

MeanScore: Visits per year (including those who said 'don't go')

Q32C How often do you normally visit for gym / healthclub / sports facilities?
Those who visit 'gym / healthclub / sports facility' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	75.6%	248	72.5%	46	65.2%	30	93.7%	9	73.0%	16	89.5%	44	67.5%	49	84.8%	18	83.6%	7	75.5%	9	84.0%	21
Once a fortnight	5.6%	18	7.5%	5	12.3%	6	2.9%	0	0.0%	0	5.2%	3	2.8%	2	8.2%	2	8.8%	1	4.5%	1	0.0%	0
Once a month	8.4%	27	17.2%	11	5.4%	3	0.0%	0	12.3%	3	3.5%	2	10.1%	7	0.0%	0	0.0%	0	11.0%	1	4.4%	1
Once every 2 months	1.8%	6	0.0%	0	0.0%	0	0.0%	0	4.4%	1	1.7%	1	3.4%	2	3.5%	1	4.4%	0	4.5%	1	0.0%	0
Once every 3-6 months	3.5%	12	0.0%	0	8.1%	4	0.0%	0	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0	4.5%	1	11.6%	3
Once a year	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't go	0.5%	2	0.0%	0	0.0%	0	3.4%	0	6.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	4.6%	15	2.8%	2	8.9%	4	0.0%	0	4.1%	1	0.0%	0	10.2%	7	3.5%	1	0.0%	0	0.0%	0	0.0%	0
Mean:		*43.99*		*42.92*		*41.74*		*49.48*		*41.37*		*48.44*		*41.71*		*48.12*		*46.03*		*42.17*		*44.54*
Weighted base:		328		63		47		9		21		49		73		21		8		12		25
Sample:		273		36		41		28		17		26		44		22		23		17		19

MeanScore: Visits per year (including those who said 'don't go')

Q32D How often do you normally visit for theatre , concert or live music?
Those who visit 'the theatre, concerts and / or music venues' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	0.7%	3	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	1.9%	7	2.5%	1	0.0%	0	0.0%	0	4.9%	2	2.3%	2	0.0%	0	4.2%	1	3.2%	1	3.2%	1	0.0%	0
Once a month	13.3%	46	29.1%	10	24.4%	8	20.0%	3	7.4%	3	4.7%	3	14.9%	8	11.5%	3	7.9%	1	10.6%	2	12.1%	5
Once every 2 months	10.5%	36	12.1%	4	2.5%	1	15.2%	2	11.2%	4	5.1%	4	14.3%	7	8.7%	3	15.1%	2	25.0%	4	11.9%	5
Once every 3-6 months	54.7%	189	37.9%	13	65.8%	22	25.2%	3	57.8%	20	53.6%	40	59.8%	31	53.1%	16	56.9%	9	47.5%	8	65.5%	26
Once a year	15.9%	55	14.8%	5	4.9%	2	30.2%	4	15.9%	5	28.7%	21	7.1%	4	20.9%	6	14.8%	2	10.6%	2	7.6%	3
Less often	1.3%	4	3.7%	1	0.0%	0	2.3%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	2.1%	0	0.0%	0	3.0%	1
Don't go	0.1%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	6	0.0%	0	2.5%	1	1.4%	0	2.7%	1	3.9%	3	0.0%	0	1.7%	1	0.0%	0	3.2%	1	0.0%	0
Mean:		*5.00*		*6.17*		*5.22*		*6.31*		*4.87*		*3.52*		*6.58*		*4.86*		*4.54*		*5.29*		*4.22*
Weighted base:		345		34		33		14		34		74		52		30		16		17		40
Sample:		358		28		27		46		32		43		40		36		41		29		36

MeanScore: Visits per year (including those who said 'don't go')

Q32E How often do you normally visit a museum, gallery, or other place of historical / cultural interest?
Those who visit 'museum, gallery or other place of historical / cultural interest' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	1.3%	4	0.0%	0	2.1%	1	0.0%	0	0.0%	0	2.6%	1	2.8%	1	0.0%	0	0.0%	0	3.9%	1	0.0%	0
Once a fortnight	2.6%	7	5.9%	2	4.4%	1	0.0%	0	0.0%	0	2.4%	1	0.0%	0	4.9%	1	6.0%	1	3.9%	1	0.0%	0
Once a month	12.4%	34	25.1%	7	14.6%	4	2.8%	0	5.1%	1	13.7%	7	13.4%	6	5.1%	2	10.6%	2	26.2%	3	5.7%	2
Once every 2 months	11.7%	32	25.0%	7	0.0%	0	24.8%	2	9.7%	3	8.3%	4	7.1%	3	23.2%	7	19.7%	3	12.1%	2	4.0%	1
Once every 3-6 months	49.6%	137	20.6%	6	54.8%	16	41.4%	4	56.8%	15	43.0%	21	58.5%	27	46.0%	14	53.7%	8	36.6%	5	73.4%	22
Once a year	17.8%	49	23.4%	7	16.1%	5	23.7%	2	19.0%	5	23.5%	11	18.2%	8	15.7%	5	8.4%	1	9.3%	1	12.9%	4
Less often	2.6%	7	0.0%	0	5.2%	1	5.2%	0	3.3%	1	4.9%	2	0.0%	0	2.7%	1	0.0%	0	0.0%	0	4.0%	1
Don't go	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.9%	5	0.0%	0	2.9%	1	2.1%	0	6.0%	2	1.7%	1	0.0%	0	2.4%	1	0.0%	0	7.9%	1	0.0%	0
Mean:		*5.31*		*6.90*		*5.99*		*3.40*		*3.31*		*5.73*		*5.44*		*4.94*		*5.70*		*8.83*		*3.27*
Weighted base:		277		29		29		9		26		48		46		31		16		13		30
Sample:		297		23		27		29		23		35		35		37		39		21		28

MeanScore: Visits per year (including those who said 'don't go')

Q32F How often do you normally visit a pub / bar / nightclub / music venue?
Those who visit 'pub / bars / nightclub /music venue' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	37.0%	146	49.6%	22	22.7%	10	46.8%	6	24.3%	9	31.7%	27	46.8%	31	36.8%	13	41.3%	9	34.5%	6	43.6%	14
Once a fortnight	22.3%	88	9.6%	4	32.2%	15	17.1%	2	29.8%	11	33.1%	28	22.5%	15	6.8%	2	14.2%	3	26.2%	4	10.6%	3
Once a month	24.1%	95	25.9%	11	24.8%	11	22.2%	3	16.5%	6	23.2%	20	20.6%	14	42.2%	15	19.8%	4	27.9%	5	21.2%	7
Once every 2 months	9.1%	36	6.7%	3	14.1%	6	13.9%	2	12.0%	4	5.1%	4	8.2%	5	8.7%	3	17.6%	4	0.0%	0	11.6%	4
Once every 3-6 months	4.4%	18	2.7%	1	6.1%	3	0.0%	0	11.0%	4	3.4%	3	2.0%	1	5.5%	2	7.2%	2	6.3%	1	2.6%	1
Once a year	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Less often	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Don't go	0.5%	2	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
(Don't know / varies)	2.1%	8	2.9%	1	0.0%	0	0.0%	0	6.4%	2	3.4%	3	0.0%	0	0.0%	0	0.0%	0	5.1%	1	2.6%	1
Mean:		*29.24*		*32.80*		*24.21*		*32.27*		*25.00*		*29.31*		*33.20*		*26.65*		*28.80*		*29.80*		*29.54*
Weighted base:		393		44		45		12		37		85		66		35		22		16		32
Sample:		362		31		33		32		35		45		39		42		52		26		27

Mid Sussex Household Survey
For Planning Perspectives

MeanScore: Visits per year (including those who said 'don't go')

Q32G How often do you normally visit a restaurant?
Those who visit 'restaurants' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	26.4%	143	37.4%	24	16.7%	12	15.6%	3	17.9%	11	31.6%	32	32.8%	24	20.9%	9	21.7%	6	26.5%	6	27.7%	17
Once a fortnight	21.0%	114	19.5%	13	24.9%	17	19.2%	4	23.5%	14	30.0%	30	13.1%	10	17.5%	8	17.8%	5	21.4%	5	14.4%	9
Once a month	33.4%	181	25.2%	16	42.3%	30	45.8%	9	34.8%	21	26.6%	27	33.2%	24	46.7%	20	36.7%	11	37.3%	8	25.8%	15
Once every 2 months	8.7%	47	7.9%	5	10.8%	8	17.4%	3	7.9%	5	6.6%	7	9.1%	7	4.1%	2	15.8%	5	4.7%	1	9.5%	6
Once every 3-6 months	7.6%	41	10.1%	7	0.0%	0	1.0%	0	12.6%	7	3.4%	3	9.3%	7	8.9%	4	4.9%	1	5.5%	1	17.2%	10
Once a year	0.7%	4	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Less often	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Don't go	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.8%	10	0.0%	0	3.4%	2	1.0%	0	3.3%	2	0.8%	1	1.2%	1	1.9%	1	2.2%	1	4.7%	1	1.4%	1
Mean:		*24.40*		*28.29*		*21.64*		*19.86*		*21.15*		*28.18*		*25.60*		*21.93*		*21.90*		*25.45*		*22.67*
Weighted base:		541		65		70		19		60		100		73		44		29		22		60
Sample:		545		48		51		64		53		59		48		55		75		37		55

MeanScore: Visits per year (including those who said 'don't go')

Q32H How often do you normally visit for ten-pin bowling?
Those who partake in 'family entertainment' activities at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	5.7%	11	5.3%	1	0.0%	0	6.0%	0	15.6%	5	5.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	2
Once a fortnight	2.8%	6	0.0%	0	5.2%	1	0.0%	0	8.7%	3	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	13.7%	28	16.1%	4	23.3%	4	29.6%	2	11.4%	4	11.8%	6	0.0%	0	12.2%	2	35.5%	3	30.2%	1	15.0%	2
Once every 2 months	9.2%	19	0.0%	0	0.0%	0	14.2%	1	8.8%	3	15.0%	8	11.9%	3	6.1%	1	3.4%	0	0.0%	0	15.2%	2
Once every 3-6 months	50.3%	102	67.3%	15	61.4%	10	13.4%	1	36.4%	13	46.4%	25	65.8%	17	59.1%	10	46.1%	4	44.1%	2	42.6%	6
Once a year	12.4%	25	0.0%	0	10.1%	2	29.4%	2	10.0%	3	13.1%	7	17.6%	4	16.6%	3	11.6%	1	12.8%	1	15.7%	2
Less often	1.0%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	1	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't go	2.6%	5	5.7%	1	0.0%	0	4.4%	0	2.7%	1	1.5%	1	4.7%	1	0.0%	0	3.4%	0	12.8%	1	0.0%	0
(Don't know / varies)	2.3%	5	5.7%	1	0.0%	0	3.0%	0	3.8%	1	1.5%	1	0.0%	0	6.1%	1	0.0%	0	0.0%	0	0.0%	0
Mean:		*7.69*		*7.08*		*6.10*		*8.49*		*14.00*		*7.57*		*2.87*		*4.01*		*5.97*		*5.08*		*10.15*
Weighted base:		202		22		16		6		35		54		25		17		8		4		14
Sample:		169		11		15		18		24		34		18		16		15		6		12

MeanScore: Visits per year (including those who said 'don't go')

Q32l How often do you normally visit for other leisure attractions?
Those who go to 'other' leisure attractions at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Once a week	63.3%	17	40.7%	2	0.0%	0	77.6%	1	46.6%	2	67.5%	2	68.2%	5	53.1%	2	100.2%	0	0.0%	0	100.0%	4
Once a fortnight	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.4%	1	0.0%	0	0.0%	0	0.0%	0
Once a month	21.4%	6	59.3%	3	0.0%	0	22.4%	0	32.3%	1	0.0%	0	18.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every 2 months	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.5%	1	0.0%	0	0.0%	0	0.0%	0
Once every 3-6 months	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't go	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	6.3%	2	0.0%	0	0.0%	0	0.0%	0	21.1%	1	32.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*38.99*		*28.27*		*0.00*		*43.05*		*35.63*		*52.00*		*38.12*		*35.31*		*52.00*		*0.00*		*52.00*
Weighted base:		27		5		0		1		4		3		7		3		0		0		4
Sample:		31		4		0		4		5		2		6		5		1		0		4

Q33 Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?
Those who visit 'Bingo',' Casino' or 'Bookmaker' facilities at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Gala Bingo, Brighton	14.3%	3	0.0%	0	48.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.9%	1	0.0%	0	0.0%	0	100.0%	1
Gala Bingo, Crawley	32.4%	7	0.0%	0	52.0%	1	0.0%	0	57.8%	3	100.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton	6.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.4%	1	0.0%	0	57.6%	1	0.0%	0
Crawley	20.4%	4	0.0%	0	0.0%	0	100.0%	2	25.5%	1	0.0%	0	52.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fletching	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.7%	1	0.0%	0	0.0%	0	0.0%	0
Hassocks	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.1%	0	0.0%	0	0.0%	0
Haywards Heath	5.6%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.4%	1	0.0%	0
Portsmouth	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	48.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	5.4%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	1	0.0%	0	0.0%	0	0.0%	0	50.1%	0	0.0%	0	0.0%	0
Weighted base:		21		1		2		2		5		3		2		3		1		1		1
Sample:		21		1		2		1		4		2		2		4		2		2		1

Q34 Where do you or members of your household normally go to the cinema?
Those who visit 'Cinema' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Cineworld, Brighton Marina Village, BRIGHTON	4.7%	20	5.0%	3	1.6%	1	4.8%	1	0.0%	0	2.3%	2	0.0%	0	7.6%	3	16.0%	3	7.6%	1	22.0%	6
Duke of York's Picturehouse, Preston Road, BRIGHTON	1.1%	4	1.4%	1	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	1	0.0%	0	8.3%	2
Odeon, Knights Park, Knights Way, TUNBRIDGE WELLS	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0	0.0%	0
Odeon, West Street, Kingswest, BRIGHTON	2.2%	9	0.0%	0	3.7%	2	1.3%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	5.7%	1	3.1%	1	17.0%	5
Orion Cinema, Cyprus Road, BURGESS HILL	12.6%	53	28.5%	17	53.3%	27	20.7%	3	0.0%	0	0.0%	0	0.0%	0	3.1%	1	19.0%	4	6.2%	1	0.0%	0
Picture House, High Street, UCKFIELD	4.6%	19	4.2%	3	0.0%	0	1.3%	0	1.2%	1	0.0%	0	0.0%	0	46.7%	16	0.0%	0	0.0%	0	0.0%	0
Brighton	7.4%	31	7.2%	4	10.2%	5	1.9%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	9.0%	2	27.2%	5	46.8%	14
Burgess Hill	2.4%	10	8.1%	5	3.7%	2	1.3%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	13.4%	2	0.0%	0
Central London / West End	0.4%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	47.8%	201	44.2%	27	25.8%	13	64.9%	10	85.2%	45	73.1%	54	40.7%	28	27.3%	9	38.2%	7	35.3%	6	5.9%	2
Horsham	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0
Cineworld, Crawley Leisure Park, London Road, CRAWLEY	3.7%	16	0.0%	0	1.6%	1	0.0%	0	1.7%	1	18.0%	13	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
East Grinstead	3.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	17.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hurstpierpoint	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0
Scott Cinemas, Atrium Building, Little King Street, EAST GRINSTEAD	7.0%	30	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.5%	1	40.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Uckfield	0.4%	2	0.0%	0	0.0%	0	2.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Vue, Valley Park Leisure Complex, Hesterman Way, Croydon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.9%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.1%	1	0.0%	0	3.1%	1	4.8%	1	0.0%	0	0.0%	0
Weighted base:		421		60		50		15		53		74		68		34		20		17		29
Sample:		390		37		37		46		44		48		45		39		43		27		24

Q35 Where do you or members of your household normally go to use a gym/healthclub/sports facility?
Those who visit 'gym / healthclub / sports facility' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Balcombe Cricket Club, Hayward Heath, BALCOMBE	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chartham Park, Felcourt Road, EAST GRINSTEAD	3.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	12.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead Sports Club, St Hill Road, EAST GRINSTEAD	3.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Energie Fitness, London Road, EAST GRINSTEAD	2.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homestead Quality B&B Gym & Pool, Homestead Lane, Valebridge Road, BURGESS HILL	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
K2 Crawley, Pease Pottage Hill, CRAWLEY	3.5%	11	0.0%	0	3.4%	2	3.1%	0	18.8%	4	8.8%	4	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
King's Centre, Moat Road, EAST GRINSTEAD	9.5%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	41.6%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA fitness Gatwick, Copthorne Road, Copthorne, CRAWLEY	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health Fitness & Wellbeing Centre, Turners Hill Road, CRAWLEY DOWN	6.1%	20	0.0%	0	0.0%	0	2.9%	0	0.0%	0	40.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spindles Health & Leisure Club, Britannia Europa Hotel Gatwick, Balcombe Road, CRAWLEY	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Switch Gym, The Orchards, HAYWARDS HEATH	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Dolphin, Pasture Hill Road, HAYWARDS HEATH	16.8%	55	61.6%	39	7.2%	3	31.3%	3	16.2%	3	0.0%	0	0.0%	0	31.8%	7	0.0%	0	0.0%	0	0.0%	0
The Triangle, Triangle Way, BURGESS HILL	21.3%	70	24.9%	16	77.3%	36	2.9%	0	0.0%	0	3.5%	2	1.6%	1	25.1%	5	61.4%	5	6.1%	1	16.0%	4
Withdean Sports Complex, Tongdean Lane, BRIGHTON	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.7%	5
Brighton	2.7%	9	0.0%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	4.8%	0	6.6%	1	27.5%	7
Burgess Hill	1.9%	6	2.8%	2	5.4%	3	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	1	4.5%	1	0.0%	0
Central London / West End	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	4.4%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Crawley	6.7%	22	0.0%	0	0.0%	0	0.0%	0	43.5%	9	20.9%	10	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croydon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0	0.0%	0	0.0%	0
Horsham	0.7%	2	0.0%	0	1.3%	1	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0
Hove	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	1
Tunbridge Wells	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Albourne	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	1	0.0%	0
Billingshurst	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Copthorne	0.5%	2	0.0%	0	0.0%	0	18.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0
Cuckfield	0.3%	1	0.0%	0	0.0%	0	11.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Golf Centre, Staplefield Road, CUCKFIELD	0.1%	0	0.0%	0	0.0%	0	4.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield Lodge, High Street, CUCKFIELD	0.1%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Curves, South Road, HAYWARDS HEATH	0.1%	0	0.0%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David lloyd, Romany Road, WORTHING	0.1%	0	0.0%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falmer	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	2
Hassocks	0.2%	1	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	1	0.0%	0	0.0%	0
Hassocks Sports Centre, Dale Avenue, HASSOCKS	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	1	0.0%	0	0.0%	0
Haywards Heath	0.3%	1	0.0%	0	0.0%	0	3.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Henfield	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	1	0.0%	0
Henfield Leisure Centre, HENFIELD	0.1%	0	0.0%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hurstpierpoint	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0
Isenhurst Health Club, Bell Lane, UCKFIELD	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	1	0.0%	0	0.0%	0	0.0%	0
Lewes Leisure Centre, Mountfield Road, LEWES	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0	0.0%	0
Lindfield	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockenden Manor, Ockenden Lane, CUCKFIELD	0.9%	3	4.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Patcham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Prince Regent Swimming Complex, Church Street, BRIGHTON	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	1
Scaynes Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Steyning	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.3%	3	0.0%	0
Steyning Leisure Centre, STEYNING	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	1	0.0%	0
The Felbridge Hotel & Spa, London Road,	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
FELBRIDGE																						
The Gym, The Pavillions, Queens Square, CRAWLEY	0.3%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Uckfield	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0	0.0%	0
Uckfield Leisure Centre, Downsview Crescent, UCKFIELD	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	2	0.0%	0	0.0%	0	0.0%	0
Virgin Active - Brighton Health and Racquets Club, Village Way, BRIGHTON	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	2
Wickwoods Country Club Hotel and Spa, Shaves Wood Lane, ALBOURNE	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	1	0.0%	0
Withdean	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	1
(Don’t know / varies)	3.5%	11	4.7%	3	3.7%	2	0.0%	0	13.3%	3	3.5%	2	0.0%	0	3.8%	1	0.0%	0	0.0%	0	5.2%	1
Weighted base:		328		63		47		9		21		49		73		21		8		12		25
Sample:		273		36		41		28		17		26		44		22		23		17		19

Q36 Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?
Those who visit 'the theatre, concerts and / or music venues' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Burgess Hill Theatre Club, Church Walk, BURGESS HILL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Chequer Mead Community Arts Centre, De La Warr Road, EAST GRINSTEAD	3.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4	18.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Martlets Hall, Civic Way, BURGESS HILL	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sallis Benney Theatre, Grand Parade, BRIGHTON	1.6%	6	0.0%	0	5.1%	2	1.4%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	7.2%	1	0.0%	0	4.8%	2
The Hawth, Hawth Avenue, CRAWLEY	7.3%	25	3.4%	1	0.0%	0	12.1%	2	33.4%	11	7.2%	5	7.1%	4	4.9%	1	0.0%	0	3.2%	1	0.0%	0
Brighton	18.5%	64	42.1%	14	15.5%	5	24.4%	3	0.0%	0	0.0%	0	2.5%	1	20.3%	6	32.2%	5	38.1%	6	54.6%	22
Burgess Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0
Central London / West End	46.7%	161	40.6%	14	57.4%	19	37.3%	5	47.7%	16	64.9%	48	41.4%	22	54.0%	16	26.0%	4	31.0%	5	28.0%	11
Crawley	2.9%	10	0.0%	0	0.0%	0	1.4%	0	6.5%	2	4.3%	3	6.0%	3	0.0%	0	1.6%	0	6.3%	1	0.0%	0
Eastbourne	3.0%	10	2.5%	1	0.0%	0	2.9%	0	0.0%	0	1.7%	1	2.3%	1	6.1%	2	14.9%	2	3.2%	1	4.8%	2
Guildford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	0.5%	2	5.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	3	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Chichester	0.3%	1	0.0%	0	0.0%	0	6.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Congress Theatre, Carlisle Road, EASTBOURNE	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Connaught Theatre, Union Place, WORTHING	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
East Grinstead	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Groombridge	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath	0.4%	2	3.7%	1	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0
The Stag Theatre, London Road, SEVENOAKS	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Theatre Royal, New Road, BRIGHTON	0.7%	2	0.0%	0	0.0%	0	6.1%	1	0.0%	0	0.0%	0	2.5%	1	0.0%	0	2.1%	0	0.0%	0	0.0%	0
Three Bridges	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	10.2%	35	2.5%	1	20.2%	7	6.0%	1	9.5%	3	15.6%	12	6.0%	3	8.3%	2	12.7%	2	12.1%	2	5.8%	2
Weighted base:		345		34		33		14		34		74		52		30		16		17		40
Sample:		358		28		27		46		32		43		40		36		41		29		36

Q37 Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest?
Those who visit 'museum, gallery or other place of historical / cultural interest' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton	8.1%	22	16.6%	5	7.7%	2	4.2%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	14.6%	2	8.2%	1	33.3%	10
Burgess Hill	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Central London / West End	72.6%	201	71.7%	21	77.0%	22	57.6%	5	83.0%	22	84.8%	41	86.6%	40	58.2%	18	66.3%	10	61.0%	8	46.8%	14
Crawley	0.6%	2	0.0%	0	0.0%	0	0.0%	0	6.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastbourne	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Hove	0.6%	2	0.0%	0	0.0%	0	17.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Abroad	0.6%	2	0.0%	0	0.0%	0	2.1%	0	3.3%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Cuckfield	0.1%	0	0.0%	0	0.0%	0	3.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ditchling	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
East Grinstead	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	3	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Haywards Heath	0.9%	3	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woburn	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	14.4%	40	7.3%	2	15.3%	4	15.0%	1	7.2%	2	12.8%	6	4.0%	2	32.8%	10	12.6%	2	30.8%	4	19.9%	6
Weighted base:		277		29		29		9		26		48		46		31		16		13		30
Sample:		297		23		27		29		23		35		35		37		39		21		28

Q38 Where do you or members of your household normally go to a pub / bar / nightclub / music venue?
Those who visit 'pub / bars / nightclub /music venue' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton	8.4%	33	5.2%	2	22.3%	10	16.4%	2	2.6%	1	0.0%	0	3.5%	2	0.0%	0	14.2%	3	4.7%	1	36.5%	12
Burgess Hill	10.0%	39	10.2%	4	65.5%	30	4.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	16.0%	4	3.2%	1	0.0%	0
Central London / West End	2.0%	8	4.8%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	3	4.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	17.6%	69	2.9%	1	0.0%	0	0.0%	0	46.6%	17	58.4%	49	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Horsham	1.8%	7	0.0%	0	0.0%	0	0.0%	0	11.2%	4	2.1%	2	0.0%	0	0.0%	0	1.6%	0	4.3%	1	0.0%	0
Hove	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2
Lewes	1.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	4	3.5%	1	3.2%	1	2.6%	1
Ardingly	0.6%	2	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashurstwood	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Balcombe	0.6%	2	0.0%	0	0.0%	0	0.0%	0	6.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bolney	0.1%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bourne Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelwood Gate	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Copthorne	1.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Down	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield	1.2%	5	2.9%	1	0.0%	0	23.4%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Ditchling	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
East Chiltington	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
East Grinstead	9.8%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	5	51.1%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falmer	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Fletching	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0
Forest Row	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross	0.8%	3	2.7%	1	0.0%	0	0.0%	0	5.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hartfield	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Hassocks	1.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	24.9%	5	6.3%	1	0.0%	0
Hastings	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath	6.0%	24	25.6%	11	8.1%	4	9.0%	1	0.0%	0	0.0%	0	2.0%	1	9.2%	3	10.0%	2	0.0%	0	3.5%	1
Henfield	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	3	0.0%	0
Horsted Keynes	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	2	0.0%	0	0.0%	0	0.0%	0
Hurstpierpoint	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	3	0.0%	0
Lindfield	2.1%	8	12.1%	5	0.0%	0	3.4%	0	0.0%	0	0.0%	0	1.3%	1	4.3%	1	0.0%	0	0.0%	0	0.0%	0
Maidenbower	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newick	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	2	0.0%	0	0.0%	0	0.0%	0
Nuthurst	0.2%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pease Pottage	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pound Hill	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scaynes Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Sharpthorne	0.6%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staplefield	0.1%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Three Bridges, Crawley	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2	0.0%	0	0.0%	0	0.0%	0
Uckfield	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0
Upper Beeding	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Warninglid	0.5%	2	0.0%	0	1.3%	1	3.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
West Hoathly	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wineham	0.4%	2	0.0%	0	0.0%	0	13.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivelsfield Green	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	4	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	22.4%	88	31.7%	14	2.8%	1	20.9%	2	16.3%	6	14.8%	13	28.1%	19	17.8%	6	25.8%	6	37.6%	6	48.3%	15
Weighted base:		393		44		45		12		37		85		66		35		22		16		32
Sample:		362		31		33		32		35		45		39		42		52		26		27

Q39 Where do you or members of your household normally go to a restaurant?
Those who visit 'restaurants' at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton	14.2%	77	4.1%	3	23.4%	16	21.6%	4	5.4%	3	0.0%	0	0.0%	0	7.0%	3	31.8%	9	20.7%	5	55.9%	34
Burgess Hill	10.5%	57	10.4%	7	60.3%	42	5.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	11.6%	3	8.1%	2	1.9%	1
Central London / West End	1.9%	10	2.6%	2	0.0%	0	5.3%	1	0.0%	0	0.0%	0	8.0%	6	3.3%	1	0.0%	0	2.3%	1	0.0%	0
Crawley	19.3%	104	10.1%	7	0.0%	0	1.0%	0	58.7%	35	57.9%	58	0.0%	0	9.8%	4	0.9%	0	0.0%	0	0.0%	0
Eastbourne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Horsham	2.2%	12	1.8%	1	1.2%	1	0.0%	0	7.5%	4	3.5%	3	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hove	0.7%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	4.0%	2
Lewes	1.7%	9	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	4	3.0%	1	3.4%	1	2.7%	2
Albourne	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bolney	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramber	0.2%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Chichester	0.1%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Copthorne	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley Down	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield	0.2%	1	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Danehill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0
East Grinstead	8.1%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	54.2%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Felbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fletching	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Forest Row	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Handcross	0.2%	1	0.0%	0	0.0%	0	1.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hassocks	1.0%	6	0.0%	0	1.2%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	3	2.3%	1	1.4%	1
Haywards Heath	8.1%	44	32.2%	21	1.8%	1	26.6%	5	3.3%	2	0.0%	0	1.8%	1	25.3%	11	5.8%	2	2.3%	1	0.0%	0
Henfield	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	4	0.0%	0
Horsted Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Hurstpierpoint	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	7.8%	2	0.0%	0
Lindfield	1.0%	5	7.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Nutley	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Ockenden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Patcham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Pound Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shoreham-by-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Tunbridge Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Turners Hill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Uckfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Upper Beeding	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Warninglid	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Grinstead	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Hoathly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
(Don't know / varies)	25.2%	136	31.7%	21	10.4%	7	25.4%	5	19.4%	12	25.2%	25	28.3%	21	24.9%	11	34.2%	10	29.5%	7	31.4%	19
Weighted base:		541		65		70		19		60		100		73		44		29		22		60

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sample:		545		48		51		64		53		59		48		55		75		37		55

Q40 Where do you or members of your household normally go tenpin bowling?
Those who partake in 'family entertainment' activities at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Burgess Hill Bowling Club, Westhill Drive, BURGESS HILL	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0	0.0%	0	0.0%	0
Hollywood Bowl, Crawley Avenue, CRAWLEY	55.7%	112	24.1%	5	62.3%	10	39.1%	3	65.9%	23	90.9%	49	40.9%	10	49.4%	9	41.0%	3	17.4%	1	0.0%	0
Horsham Superbowl, HORSHAM	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lindfield Bowling Club, Backwoods Lane, HAYWARDS HEATH	0.6%	1	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton	13.5%	27	8.0%	2	26.4%	4	4.4%	0	0.0%	0	0.0%	0	7.2%	2	16.5%	3	47.6%	4	12.8%	1	85.7%	12
Burgess Hill	2.6%	5	5.7%	1	6.1%	1	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	1
Central London / West End	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.8%	1
Crawley	14.7%	30	51.2%	11	0.0%	0	39.9%	3	10.2%	4	1.5%	1	29.8%	8	10.0%	2	3.4%	0	44.1%	2	0.0%	0
Eastbourne	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	1	0.0%	0	0.0%	0	0.0%	0
Horsham	0.4%	1	0.0%	0	5.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowlplex Bowling, Brighton Marina, BRIGHTON	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuckfield	0.1%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haywards Heath	0.1%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	1	0.0%	0
Hurstpierpoint	0.1%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
K2 Leisure Centre, CRAWLEY	3.1%	6	0.0%	0	0.0%	0	0.0%	0	18.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitstable	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	0	0.0%	0	0.0%	0
(Don’t know / varies)	4.9%	10	5.7%	1	0.0%	0	7.4%	0	5.7%	2	0.0%	0	17.0%	4	6.1%	1	3.4%	0	12.8%	1	0.0%	0
Weighted base:		202		22		16		6		35		54		25		17		8		4		14
Sample:		169		11		15		18		24		34		18		16		15		6		12

Q41 Where do you or members of your household normally go for other leisure activities not mentioned?
Those who go to 'other' leisure attractions at Q32

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Brighton	12.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	79.7%	3
Crawley	11.9%	3	0.0%	0	0.0%	0	0.0%	0	15.5%	1	100.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	2.4%	1	0.0%	0	0.0%	0	0.0%	0	15.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ardingly	4.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bolney	1.1%	0	0.0%	0	0.0%	0	32.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buxted	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	1	0.0%	0	0.0%	0	0.0%	0
Chessington	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowborough	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.4%	1	0.0%	0	0.0%	0	0.0%	0
Cuckfield	0.7%	0	0.0%	0	0.0%	0	22.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Grinstead	8.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edenbridge	4.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hassocks	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.2%	0	0.0%	0	0.0%	0
Haywards Heath	21.0%	6	40.7%	2	0.0%	0	22.4%	0	32.3%	1	0.0%	0	18.9%	1	0.0%	0	0.0%	0	0.0%	0	20.3%	1
Little Horsted	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	1	0.0%	0	0.0%	0	0.0%	0
Uckfield	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.5%	1	0.0%	0	0.0%	0	0.0%	0
West Hoathly	2.4%	1	0.0%	0	0.0%	0	0.0%	0	15.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	17.6%	5	59.3%	3	0.0%	0	22.4%	0	21.1%	1	0.0%	0	0.0%	0	22.5%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		27		5		0		1		4		3		7		3		0		0		4
Sample:		31		4		0		4		5		2		6		5		1		0		4

Q42 What improvements could be made to Mid Sussex's leisure offer that would make you visit / partake in leisure activities more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Nothing	43.5%	437	37.6%	53	40.7%	54	42.1%	12	49.4%	54	42.6%	66	31.6%	50	50.4%	36	42.2%	15	58.7%	39	54.2%	57
A casino	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A swimming pool	4.0%	40	0.8%	1	5.4%	7	0.7%	0	4.9%	5	6.5%	10	2.7%	4	5.8%	4	0.0%	0	5.6%	4	3.5%	4
A theatre	0.7%	7	0.9%	1	0.0%	0	3.0%	1	0.8%	1	0.8%	1	0.6%	1	2.1%	1	0.7%	0	0.0%	0	0.0%	0
An art house cinema	1.1%	11	3.6%	5	0.7%	1	1.0%	0	0.9%	1	0.0%	0	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0
Better cinema provision e.g. new multi-screen	2.1%	21	6.3%	9	5.1%	7	3.6%	1	2.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	13.3%	133	18.2%	26	18.4%	24	14.4%	4	13.1%	14	15.5%	24	14.8%	24	1.0%	1	16.2%	6	8.2%	5	4.9%	5
Improved access by foot and cycle	0.1%	1	0.0%	0	0.6%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved public transport	1.0%	10	0.0%	0	0.0%	0	1.4%	0	0.0%	0	2.1%	3	0.8%	1	1.7%	1	3.4%	1	2.4%	2	0.8%	1
Improved security / CCTV	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved street furniture	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvements in the built environment	0.3%	3	1.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
More / better car parking	1.7%	17	1.4%	2	0.0%	0	3.0%	1	1.7%	2	3.2%	5	0.8%	1	4.6%	3	1.0%	0	1.9%	1	1.6%	2
More / better cultural facilities	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better disabled access	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better health clubs / gyms	1.0%	10	2.2%	3	1.0%	1	1.8%	1	0.0%	0	0.8%	1	2.2%	4	0.0%	0	1.9%	1	0.0%	0	0.0%	0
More / better policing	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public houses	0.4%	4	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better signposting and information	0.8%	8	0.0%	0	4.5%	6	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
More better parks / green spaces	0.8%	8	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	2.9%	2	6.0%	2	0.0%	0	0.8%	1
More for children	4.1%	41	3.8%	5	10.2%	14	1.4%	0	1.6%	2	6.4%	10	3.6%	6	0.7%	1	8.2%	3	1.1%	1	0.0%	0
More local sports & recreation facilities	2.0%	20	0.0%	0	1.2%	2	1.0%	0	2.5%	3	7.9%	12	0.8%	1	1.0%	1	2.4%	1	0.0%	0	0.0%	0
More nightclubs	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More pavement cafes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
More quality restaurants	0.9%	9	0.0%	0	3.9%	5	0.7%	0	0.0%	0	1.1%	2	0.0%	0	1.9%	1	1.5%	1	0.0%	0	0.0%	0
More street cleaning	0.6%	6	1.7%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.0%	0	0.8%	1	0.0%	0
Provision of public toilets	0.5%	5	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Ten-pin bowling	0.4%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.7%	0	1.1%	1	0.0%	0
Other	4.8%	48	2.8%	4	3.4%	4	1.4%	0	2.0%	2	9.5%	15	9.0%	14	0.7%	1	7.1%	3	2.7%	2	3.3%	4
An ice-skating rink	1.5%	15	0.0%	0	0.0%	0	0.0%	0	4.8%	5	1.5%	2	0.0%	0	7.7%	6	0.0%	0	2.7%	2	0.0%	0
Better cycling facilities (e.g. cycle paths)	0.7%	7	0.8%	1	1.1%	1	0.0%	0	0.0%	0	0.7%	1	1.4%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3
General improvements to all facilities	0.5%	5	0.9%	1	0.0%	0	1.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Improved leisure centre	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	1.9%	1	0.0%	0	0.0%	0
More / better advertising	1.0%	10	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	6	1.0%	1	1.9%	1	1.2%	1	1.1%	1
More / better leisure facilities in general	1.8%	18	0.8%	1	1.0%	1	0.0%	0	0.0%	0	1.1%	2	7.3%	12	0.0%	0	0.0%	0	0.8%	1	1.9%	2
More / better public swimming sessions / facilities	0.4%	4	0.8%	1	0.7%	1	1.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
More activities for the elderly	0.4%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.7%	0	0.0%	0	0.8%	1
More facilities / activities for the elderly	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.7%	0	0.0%	0	0.8%	1
More live music venues	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.8%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Open a cinema in Haywards Heath	0.4%	4	2.7%	4	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do leisure activities)	4.8%	48	6.0%	8	1.5%	2	7.6%	2	3.0%	3	2.4%	4	6.0%	10	7.8%	6	4.5%	2	3.1%	2	8.9%	9
(Don’t know)	11.9%	120	16.5%	23	8.5%	11	15.1%	4	15.1%	16	8.2%	13	11.1%	18	7.5%	5	11.4%	4	9.4%	6	17.4%	18
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

GEN Gender of respondent

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Male	28.8%	290	21.4%	30	22.8%	30	34.0%	10	33.9%	37	30.0%	46	26.8%	43	30.5%	22	35.6%	13	32.6%	22	35.1%	37
Female	71.2%	716	78.6%	111	77.2%	102	66.0%	19	66.1%	72	70.0%	108	73.2%	117	69.5%	50	64.4%	23	67.4%	45	64.9%	69
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

AGE Can I just ask, how old are you?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
18-24	4.1%	42	3.2%	5	6.0%	8	3.6%	1	3.1%	3	1.4%	2	5.8%	9	5.6%	4	7.5%	3	0.0%	0	6.1%	6
25-34	15.7%	158	10.3%	14	30.9%	41	11.5%	3	19.8%	22	22.8%	35	18.7%	30	6.0%	4	12.0%	4	6.6%	4	0.0%	0
35-44	20.2%	203	27.8%	39	27.6%	37	11.4%	3	17.1%	19	30.3%	47	21.8%	35	11.8%	8	11.9%	4	6.5%	4	6.5%	7
45-54	18.8%	189	22.3%	31	19.8%	26	13.9%	4	19.9%	22	15.4%	24	21.8%	35	23.0%	17	13.5%	5	13.9%	9	15.8%	17
55-64	18.5%	186	17.9%	25	8.1%	11	20.1%	6	20.7%	23	15.8%	25	21.9%	35	20.8%	15	10.5%	4	18.5%	12	29.6%	31
65+	20.1%	202	14.6%	21	5.5%	7	34.1%	10	15.8%	17	13.5%	21	10.0%	16	28.3%	20	43.5%	16	49.5%	33	39.6%	42
(Refused)	2.5%	25	3.9%	5	2.2%	3	5.4%	2	3.7%	4	0.9%	1	0.0%	0	4.5%	3	1.1%	0	5.0%	3	2.5%	3
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

EMP Which of the following best describes the chief wage earner of your household's current employment situation?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Working full time	55.5%	559	61.4%	86	62.5%	83	33.8%	10	55.8%	61	71.5%	111	66.3%	106	46.7%	33	25.2%	9	26.5%	18	39.8%	42
Working part time	7.7%	78	8.4%	12	9.7%	13	13.2%	4	2.2%	2	5.4%	8	4.6%	7	6.5%	5	25.7%	9	14.4%	10	7.3%	8
Unemployed	1.5%	15	0.8%	1	3.9%	5	2.4%	1	2.3%	3	0.0%	0	1.2%	2	3.0%	2	0.0%	0	0.0%	0	1.1%	1
Retired	27.1%	272	24.1%	34	13.5%	18	41.8%	12	27.0%	30	17.4%	27	17.2%	27	37.5%	27	44.1%	16	52.5%	35	44.4%	47
A housewife	1.7%	17	0.0%	0	1.0%	1	3.5%	1	8.2%	9	1.1%	2	1.9%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0
A student	0.2%	2	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Self employed	1.8%	18	0.8%	1	4.5%	6	1.9%	1	0.0%	0	0.0%	0	2.8%	4	0.0%	0	1.0%	0	0.0%	0	4.9%	5
Sick / disabled	0.8%	8	0.0%	0	1.9%	3	0.0%	0	0.8%	1	0.7%	1	0.0%	0	2.8%	2	0.0%	0	1.6%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	3.8%	38	4.5%	6	1.9%	3	3.3%	1	3.7%	4	3.8%	6	6.1%	10	2.6%	2	2.2%	1	4.9%	3	2.5%	3
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

HOM How many people live in your home including yourself and children? [PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
One	14.9%	150	16.6%	23	7.7%	10	15.1%	4	15.2%	17	12.8%	20	10.1%	16	14.4%	10	17.7%	6	33.6%	22	19.3%	21
Two	30.8%	310	28.6%	40	19.9%	26	35.9%	10	24.9%	27	37.8%	58	22.7%	36	43.2%	31	32.5%	12	33.2%	22	43.8%	46
Three	18.8%	190	13.1%	18	33.8%	45	6.8%	2	14.7%	16	13.0%	20	29.5%	47	5.6%	4	28.7%	10	11.9%	8	17.5%	19
Four	20.6%	207	24.8%	35	26.5%	35	21.8%	6	19.7%	22	21.7%	34	21.3%	34	21.5%	15	13.0%	5	10.4%	7	14.1%	15
Five	7.6%	76	12.3%	17	4.1%	5	15.4%	4	13.7%	15	10.0%	16	5.3%	8	6.8%	5	3.7%	1	2.7%	2	2.0%	2
Six	1.6%	16	0.0%	0	1.6%	2	0.0%	0	6.3%	7	0.0%	0	2.3%	4	4.0%	3	1.5%	1	0.0%	0	0.0%	0
Seven or more	1.0%	10	0.0%	0	0.6%	1	1.6%	0	0.9%	1	1.4%	2	1.9%	3	1.9%	1	0.0%	0	2.1%	1	0.0%	0
(Refused)	4.6%	46	4.5%	6	5.8%	8	3.3%	1	4.6%	5	3.3%	5	6.9%	11	2.6%	2	2.9%	1	6.1%	4	3.2%	3
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

ADU How many adults aged 16 years and over, including yourself, live in your household?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
One	19.3%	194	19.5%	28	11.6%	15	16.7%	5	18.9%	21	21.8%	34	15.9%	25	15.9%	11	17.7%	6	35.1%	23	23.9%	25
Two	51.0%	513	57.7%	81	53.2%	71	43.7%	12	47.8%	52	60.9%	94	37.2%	59	60.4%	43	59.8%	22	42.3%	28	46.7%	49
Three	14.5%	146	10.1%	14	17.6%	23	18.3%	5	13.9%	15	10.6%	16	27.7%	44	6.0%	4	15.3%	6	4.2%	3	13.7%	15
Four or more	10.4%	104	8.2%	12	11.9%	16	18.0%	5	14.0%	15	3.4%	5	12.2%	19	15.1%	11	4.3%	2	11.5%	8	11.3%	12
(Refused)	4.9%	49	4.5%	6	5.8%	8	3.3%	1	5.5%	6	3.3%	5	6.9%	11	2.6%	2	2.9%	1	6.9%	5	4.4%	5
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

CHI How many children aged 15 years and under, live in your household?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	62.2%	626	53.1%	75	45.3%	60	72.4%	21	61.7%	68	51.7%	80	64.5%	103	74.4%	53	68.4%	25	76.9%	51	85.4%	91
One	13.2%	133	15.1%	21	30.3%	40	6.4%	2	6.6%	7	17.8%	28	7.2%	11	4.9%	3	14.9%	5	13.3%	9	5.4%	6
Two	14.5%	146	22.3%	31	16.8%	22	14.7%	4	10.7%	12	17.6%	27	16.5%	26	16.7%	12	10.8%	4	2.7%	2	4.8%	5
Three	3.7%	37	5.1%	7	1.0%	1	2.3%	1	10.6%	12	8.2%	13	1.9%	3	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Four or more	1.6%	16	0.0%	0	1.0%	1	0.9%	0	4.9%	5	1.4%	2	3.1%	5	1.5%	1	0.0%	0	1.1%	1	0.0%	0
(Refused)	4.8%	49	4.5%	6	5.8%	8	3.3%	1	5.5%	6	3.3%	5	6.9%	11	2.6%	2	2.9%	1	6.1%	4	4.4%	5
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

INC Approximately what is your total household income?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
£0-£15,000	4.9%	50	4.5%	6	1.7%	2	2.4%	1	7.8%	9	3.1%	5	5.2%	8	3.4%	2	5.2%	2	8.3%	5	8.3%	9
£15,000 - £20,000	2.8%	28	3.2%	4	6.4%	9	7.5%	2	2.6%	3	1.3%	2	1.9%	3	2.1%	2	3.6%	1	0.0%	0	2.6%	3
£21,000 - £30,000	5.7%	57	4.1%	6	5.5%	7	4.8%	1	6.9%	8	7.2%	11	1.5%	2	6.5%	5	1.5%	1	14.1%	9	6.8%	7
£31,000 - £40,000	5.1%	51	4.2%	6	3.5%	5	10.0%	3	9.9%	11	6.7%	10	5.4%	9	6.9%	5	2.1%	1	1.9%	1	1.1%	1
£41,000 - £50,000	5.8%	59	6.0%	8	10.8%	14	3.6%	1	4.5%	5	6.6%	10	5.2%	8	5.9%	4	5.9%	2	0.8%	1	4.5%	5
£51,000 - £60,000	4.3%	43	2.2%	3	6.6%	9	0.0%	0	6.5%	7	3.4%	5	5.1%	8	7.1%	5	2.4%	1	2.2%	1	3.2%	3
£61,000 - £70,000	3.6%	37	0.8%	1	3.0%	4	1.4%	0	0.0%	0	10.1%	16	6.6%	10	2.4%	2	1.0%	0	1.2%	1	1.9%	2
£71,000 - £80,000	2.5%	25	8.9%	13	2.5%	3	1.9%	1	0.0%	0	1.1%	2	1.9%	3	3.1%	2	0.0%	0	0.0%	0	1.6%	2
£81,000 - £90,000	1.5%	15	0.9%	1	1.0%	1	1.0%	0	0.0%	0	3.0%	5	2.7%	4	0.0%	0	1.0%	0	1.1%	1	1.9%	2
£91,000 - £100,000	0.9%	9	0.0%	0	1.8%	2	0.9%	0	0.0%	0	2.3%	3	0.0%	0	0.0%	0	1.9%	1	1.1%	1	1.1%	1
£100,000 - £150,000	2.6%	26	6.4%	9	2.5%	3	2.9%	1	0.0%	0	2.6%	4	4.7%	7	1.0%	1	2.8%	1	0.0%	0	0.0%	0
151000+	1.0%	10	1.9%	3	0.6%	1	2.7%	1	0.8%	1	0.0%	0	1.9%	3	1.0%	1	1.0%	0	1.1%	1	0.0%	0
(Don't know / refused)	59.3%	596	57.0%	80	54.1%	72	61.1%	17	61.1%	67	52.7%	82	58.0%	93	60.6%	43	71.7%	26	68.4%	45	66.9%	71
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

CAR How many cars does your household own or have the use of?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	7.7%	78	7.5%	11	9.1%	12	5.1%	1	13.3%	15	2.6%	4	6.0%	10	2.4%	2	8.6%	3	9.5%	6	13.5%	14
One	35.3%	355	38.2%	54	35.4%	47	24.3%	7	30.9%	34	30.7%	48	35.2%	56	30.5%	22	38.6%	14	40.4%	27	44.4%	47
Two	39.8%	401	41.6%	59	37.2%	49	42.8%	12	37.9%	41	53.5%	83	37.9%	61	42.0%	30	34.1%	12	33.2%	22	29.2%	31
Three or more	12.7%	128	6.5%	9	12.5%	17	24.5%	7	12.5%	14	10.4%	16	17.9%	29	22.6%	16	16.2%	6	9.2%	6	8.5%	9
(Refused)	4.5%	45	6.3%	9	5.8%	8	3.3%	1	5.4%	6	2.7%	4	3.0%	5	2.6%	2	2.6%	1	7.6%	5	4.4%	5
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

FUT Would you be willing to be re-contacted for future quality control purposes?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Yes	59.1%	595	61.7%	87	65.5%	87	67.2%	19	52.5%	57	66.3%	103	59.9%	96	69.7%	50	60.6%	22	49.0%	32	39.1%	41
No	40.9%	411	38.3%	54	34.5%	46	32.8%	9	47.5%	52	33.7%	52	40.1%	64	30.3%	22	39.4%	14	51.0%	34	60.9%	65
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

PC Postcode Sector:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
BN1 5	4.9%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.5%	49
BN1 8	5.1%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	48.6%	51
BN5 9	2.8%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.2%	29	0.0%	0
BN6 8	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	36	0.0%	0	0.0%	0
BN6 9	3.7%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	56.8%	38	0.0%	0
BN8 4	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	12	0.0%	0	0.0%	0	0.0%	0
BN45 7	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	5
RH10 3	4.2%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.0%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH10 4	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.6%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH10 5	1.3%	13	0.0%	0	0.0%	0	0.0%	0	11.5%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH10 7	7.1%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.4%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH11 9	6.2%	63	0.0%	0	0.0%	0	0.0%	0	57.2%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH15 0	4.0%	40	0.0%	0	30.2%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH15 8	5.3%	53	0.0%	0	40.3%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH15 9	3.9%	39	0.0%	0	29.5%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH16 1	3.3%	34	23.9%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH16 2	2.5%	25	18.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH16 3	4.4%	44	31.3%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH16 4	3.7%	38	26.7%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH17 5	2.8%	29	0.0%	0	0.0%	0	100.0%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH17 6	3.4%	34	0.0%	0	0.0%	0	0.0%	0	31.3%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH17 7	3.8%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	52.6%	38	0.0%	0	0.0%	0	0.0%	0
RH18 5	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH19 1	4.5%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.6%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH19 2	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH19 3	4.4%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.7%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH19 4	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.8%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0
TN22 3	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.3%	22	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

QUOTA Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Zone 1	14.0%	141	100.0%	141	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	13.2%	133	0.0%	0	100.0%	133	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	2.8%	29	0.0%	0	0.0%	0	100.0%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	10.9%	109	0.0%	0	0.0%	0	0.0%	0	100.0%	109	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	15.4%	155	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	155	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6	15.9%	160	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	160	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	7.1%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	72	0.0%	0	0.0%	0	0.0%	0
Zone 8	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	36	0.0%	0	0.0%	0
Zone 9	6.6%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	66	0.0%	0
Zone 10	10.5%	106	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	106
Weighted base:		1006		141		133		29		109		155		160		72		36		66		106
Sample:		1007		101		101		102		100		100		101		100		100		101		101

Other Responses:

Other Responses – Summary Counts

Mid Sussex Telephone Household Survey
for Planning Perspectives
‘Other’ Responses

Q04 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)?

Yes - going for a walk	2
Yes - dropping off / picking up someone	2
Yes - bird-watching	1
Yes - ten-pin bowling	1
Total	**6**

Q06 What do you like about this store / town centre?

Other :	
Cheap parking	1
Close to London	1
Diversity	1
Free parking	1
Total	**4**
A specific shop :	
Tesco	1
Total	**1**
A specific attraction :	
Central to all roads	1
Good library	1
Total	**2**

Q23 What do you like about East Grinstead?

Other :	
Convenient for school run	1
DIY store	1
Good charity shops	1
Good train service to London	1
Opticians	1
Reasonable quality of shopping	1
Total	**6**
A specific shop :	
Aldi	2
Clever Cloggs	1
Costa Coffee	1
M&Co	1
Sainsbury's	1
Starbucks	1
Waitrose	1
Total	**8**
A specific attraction :	
The Bluebell Railway	1
The Old High Street	1
Total	**2**

Q24 What could be improved about East Grinstead that would make you visit more often?

Open a Tesco store	2
Access by rail	1
Improve the leisure centre	1
Less charity shops	1
Less food shops	1
Less gangs of teenagers loitering	1
Less nightclubs / night-life	1
Less phone shops	1
Less phone shops and estate agents	1
Less vacant shops	1
Lower rent to encourage local shops	1
Open a cinema	1
Open a GAP store or a John Lewis	1
Total	**14**

Q26 What do you like about Haywards Heath?

Other :	
Familiarity	2
Good bakers	2
Good railway access	2
Close to London and Brighton	1
Good bike-riding routes	1
Good charity shops	1
Good children's clothes shops	1
Good dentist	1
Good jewellers	1
Good opticians	1
Good phone shop	1
Good schools	1
Not over-developed	1
Not too busy	1
Total	**17**
A specific shop :	
Debenhams	1
Iceland	1
Seymour & Dench Florist	1
Total	**3**
A specific attraction :	
Railway station	2
Hospital	1
Swimming pool	1
Total	**4**

Q27 What could be improved about Haywards Heath that would make you visit more often?

Better market	2
Improve train station	2
Less busy	2
Less cafés / restaurants	2
Less vacant shops	2
Open a Wilkinson's store	2
Reduce the rent / rates for shopkeepers	2
Better cycling facilities	1
Better disabled assistance in shops	1
Better policing / security	1
Build a by-pass	1
Car parking machine should give change	1
More cafés / restaurants	1
Open a fireplace shop	1
Open a Morrisons supermarket	1
Open a Tesco supermarket	1
Pay for parking after you finish shopping	1
Sainsbury's should be in the centre of the town	1
Total	**25**

Q29 What do you like about Burgess Hill?

Good library	2
Friendly staff	1
Good charity shops	1
Good dentist	1
Good fabric shops	1
Good fish and chip shops	1
Good for everyday use	1
Good hairdressers	1
Good independent shops	1
Good variety of shops in general	1
Lower prices in shops	1
My bank is located there	1
My chiropractor is located there	1
No traffic	1
Not too big	1
On-going development	1
Plenty of seating areas	1
Wider choice of things to do in general	1
Total	**19**
A specific shop :	
Has a Homebase store	1
Has a New Look store	1
Has a Sainsbury's supermarket	1
Has a Wickes store	1
Total	**4**
A specific attraction :	
Central Park	2
Martlet Shopping Centre	1
Total	**3**

Q30 What could be improved about Burgess Hill that would make you visit more often?

Better market provision	2
Better policing / security	2
Less charity shops	2
Better cycling provision (cycle paths etc.)	1
Cheaper parking	1
Closer to home	1
Less housing being built	1
Lower prices in stores	1
More / better selection of clothing shops	1
More / better street furniture (seats, bins etc.)	1
More community-based projects	1
More menswear shops	1
Open a book shop	1
Open a DIY store	1
Open a Marks & Spencer store	1
Open a sports shop	1
Open an Aldi supermarket	1
Open an Asda supermarket	1
Total	**21**

Q31 If shopping with children, are there any facilities which would assist you?

A specific retailer or café :	
Mothercare	2
M&Co	1
Marks & Spencer	1
Total	**4**
Other :	
Better lifts / escalators	2
Cheaper bus fares	2
Introduce mini trolleys	2
Better disabled access	1
Easier shopping access	1
Free parking	1
Improved pavements	1
More / better toy shops	1
Something to play with in the trolley (e.g. balloon)	1
Total	**12**

Q32X Do you or your household ever visit any of the following leisure attractions?

Golf	2
Green bowls	2
Parks	2
Swimming	2
Walking	2
Badminton	1
Bowls	1
Bridge	1
Cricket	1
Dancing	1
Dog walking	1
Fishing	1
Garden centres	1
Gardening	1
Golf club	1
Indoor climbing	1
Language school	1
Merlin pass	1
Nation trust	1
Pilates	1
Playgrounds	1
Pray time	1
Tennis	1
Theme parks	1
Walking	1
Zoo, farms	1
Total	**31**

Q42 What improvements could be made to Mid Sussex's leisure offer that would make you visit / partake in leisure activities more often?

A golf course	2
A wider variety of leisure facilities Haywards Heath	2
An indoor roller-skate park	2
Better cleanliness in gyms	2
Cheaper deals for families	2
A farmers' market	1
A greater financial support toward art and leisure	1
A snow dome	1
Another church	1
Art galleries	1
Better access by car	1
Better information for disabled children	1
Better road maintenance	1
Better shopping area in East Grinstead	1
Bigger events (e.g. shows or big names)	1
Fitness classes open later	1
Free car parking	1
Free entry to attractions for children	1
Free sporting events	1
Improved access by car	1
Improved quality of football pitches	1
Improved quality of shows	1
Introduce a swimming season ticket	1
Less crowded / quieter	1
Less traffic wardens	1
Longer opening hours	1
Lower swimming pool entrance fees	1
Lower-priced laser quest	1
More disabled-friendly activities	1
More interesting exhibitions at the art gallery	1
More special offers	1
More women-only activities	1
Rugby ground relocated to be closer to town centre	1
Total	**38**

4

4

TABLE 1: ALL FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)

Including Special Forms of Trading (SFT)*

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	5.0%	0.3%	1.1%	0.1%	0.5%	0.0%	1.0%	0.0%	0.5%	0.0%	0.9%
	Haywards Heath TC: M&S, Orchards SC	5.7%	0.0%	3.9%	1.1%	0.3%	0.0%	4.1%	0.1%	0.7%	0.2%	1.4%
	HAYWARDS HEATH TOWN CENTRE: TOTAL	**10.7%**	**0.3%**	**5.0%**	**1.2%**	**0.9%**	**0.0%**	**5.0%**	**0.1%**	**1.2%**	**0.2%**	**2.3%**
	Burgess Hill Town Centre	1.0%	17.5%	0.8%	0.5%	0.0%	0.0%	1.1%	5.9%	3.2%	0.1%	2.8%
	Burgess Hill TC: Waitrose, The Martlets	1.7%	15.8%	6.4%	0.8%	0.0%	0.0%	2.5%	9.6%	7.5%	1.1%	3.5%
	BURGESS HILL TOWN CENTRE: TOTAL	**2.6%**	**33.3%**	**7.2%**	**1.3%**	**0.0%**	**0.0%**	**3.6%**	**15.5%**	**10.7%**	**1.3%**	**6.3%**
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.5%
	East Grinstead TC: Waitrose, West Street	0.0%	0.0%	0.0%	0.1%	1.7%	22.6%	2.6%	0.0%	0.0%	0.0%	4.7%
	EAST GRINSTEAD TOWN CENTRE: TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**1.7%**	**25.0%**	**2.6%**	**0.0%**	**0.0%**	**0.0%**	**5.2%**
	Hassocks	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	29.2%	4.4%	0.4%	1.5%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.7%	0.0%	0.7%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	5.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.9%
	Cuckfield	0.0%	0.0%	3.5%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Lindfield	2.0%	0.0%	0.0%	0.3%	0.0%	0.2%	1.5%	0.0%	0.0%	0.0%	0.4%
	Haywards Heath: All Other Shops & Stores	7.7%	0.0%	10.5%	0.9%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	1.6%
	Burgess Hill: All Other Shops & Stores	0.2%	7.0%	0.9%	0.0%	0.0%	0.0%	1.5%	2.2%	1.1%	0.0%	1.2%
	East Grinstead: All Other Shops & Stores	0.0%	0.0%	0.0%	0.0%	1.4%	1.9%	0.0%	0.0%	0.0%	0.0%	0.6%
	MAIN VILLAGE CENTRES: SUB-TOTAL	**9.9%**	**7.3%**	**14.9%**	**1.2%**	**7.6%**	**2.4%**	**5.4%**	**31.5%**	**15.1%**	**0.4%**	**6.9%**
	Tesco, Jane Murray Way, Burgess Hill	9.5%	46.4%	20.4%	0.6%	0.4%	0.0%	4.9%	36.5%	24.8%	2.2%	11.1%
	Sainsbury's, Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	6.2%	45.0%	1.7%	0.0%	0.0%	0.0%	9.5%
	Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	1.5%	16.4%	0.2%	0.0%	0.0%	0.0%	3.3%
	Sainsbury's, Bannister Way, Haywards Heath	55.0%	2.8%	41.5%	13.0%	0.0%	0.0%	22.0%	2.1%	1.9%	0.0%	11.7%
	Other Out-of-Centre Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**64.5%**	**49.2%**	**61.9%**	**13.6%**	**8.0%**	**61.5%**	**28.8%**	**38.6%**	**26.7%**	**2.2%**	**35.6%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**87.8%**	**90.1%**	**89.0%**	**17.4%**	**18.1%**	**89.0%**	**45.5%**	**85.7%**	**53.7%**	**4.1%**	**56.3%**
OTHER CENTRES & STORES	Brighton	0.8%	2.3%	3.7%	0.0%	0.0%	0.0%	0.4%	2.1%	3.4%	66.6%	8.6%
	Crawley	0.0%	1.6%	0.6%	67.6%	62.1%	3.3%	0.6%	0.0%	0.0%	0.0%	16.0%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.4%	0.0%	0.0%	0.0%	0.5%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	2.4%	15.5%	2.1%
	Horsham	0.0%	0.0%	1.3%	1.4%	0.0%	0.0%	0.0%	0.2%	3.6%	0.0%	0.4%
	Lewes	0.0%	0.6%	0.7%	0.0%	0.0%	0.0%	6.0%	3.6%	0.5%	0.2%	0.8%
	Uckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.2%	0.0%	0.0%	0.0%	1.3%
	All Other Shops & Stores	0.6%	0.4%	1.3%	9.0%	12.8%	2.1%	16.8%	2.4%	27.4%	8.7%	7.5%
	INTERNET/ MAIL ORDER/ SFT	**10.8%**	**4.9%**	**3.5%**	**4.6%**	**7.0%**	**5.0%**	**9.2%**	**3.8%**	**9.1%**	**4.9%**	**6.5%**
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Market share analysis informed by the August 2014 household telephone interview survey conducted by NEMS Market Research.

Notes: The total market shares for food and convenience goods shopping have been derived from the market share analysis for main food (Table 2), secondary main food (Tables 3) and top-up food purchases (Table 4)

*Special Forms of Trading (SFT) comprises sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

TABLE 2: MAIN FOOD (PRIMARY) SHOPPING - MARKET SHARE ANALYSIS (%)

Including Special Forms of Trading (SFT)*

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	2.7%	0.0%	0.7%	0.0%	0.8%	0.0%	0.7%	0.0%	0.8%	0.0%	0.6%
	Haywards Heath TC: M&S, Orchards SC	1.4%	0.0%	1.0%	0.0%	0.0%	0.0%	2.0%	0.0%	1.1%	0.0%	0.4%
	HAYWARDS HEATH TOWN CENTRE: TOTAL	**4.1%**	**0.0%**	**1.7%**	**0.0%**	**0.8%**	**0.0%**	**2.7%**	**0.0%**	**1.9%**	**0.0%**	**1.0%**
	Burgess Hill Town Centre	0.9%	20.2%	0.7%	0.6%	0.0%	0.0%	1.5%	6.1%	2.0%	0.0%	3.1%
	Burgess Hill TC: Waitrose, The Martlets	0.0%	8.9%	3.1%	0.9%	0.0%	0.0%	2.1%	10.8%	8.7%	1.2%	2.5%
	BURGESS HILL TOWN CENTRE: TOTAL	**0.9%**	**29.1%**	**3.7%**	**1.5%**	**0.0%**	**0.0%**	**3.6%**	**16.9%**	**10.7%**	**1.2%**	**5.6%**
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.3%
	East Grinstead TC: Waitrose, West Street	0.0%	0.0%	0.0%	0.0%	2.3%	22.7%	3.3%	0.0%	0.0%	0.0%	4.9%
	EAST GRINSTEAD TOWN CENTRE: TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.3%**	**24.5%**	**3.3%**	**0.0%**	**0.0%**	**0.0%**	**5.2%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.5%	0.0%	0.0%	0.5%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.2%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Haywards Heath: All Other Shops & Stores	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Burgess Hill: All Other Shops & Stores	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.7%	1.0%	0.8%	0.0%	0.2%
	East Grinstead: All Other Shops & Stores	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	MAIN VILLAGE CENTRES: SUB-TOTAL	**0.0%**	**0.5%**	**1.0%**	**0.0%**	**1.7%**	**0.0%**	**0.7%**	**14.5%**	**3.2%**	**0.0%**	**1.1%**
	Tesco, Jane Murray Way, Burgess Hill	9.3%	58.3%	26.2%	0.8%	0.5%	0.0%	5.1%	50.5%	36.9%	3.2%	14.1%
	Sainsbury's, Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	8.0%	48.5%	0.7%	0.0%	0.0%	0.0%	10.4%
	Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	2.1%	16.4%	0.0%	0.0%	0.0%	0.0%	3.4%
	Sainsbury's, Bannister Way, Haywards Heath	68.8%	1.6%	55.0%	18.6%	0.0%	0.0%	29.5%	2.5%	2.4%	0.0%	14.9%
	Other Out-of-Centre Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**78.1%**	**59.9%**	**81.2%**	**19.5%**	**10.6%**	**64.8%**	**35.4%**	**53.0%**	**39.4%**	**3.2%**	**42.8%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**83.1%**	**89.4%**	**87.6%**	**20.9%**	**15.4%**	**89.3%**	**45.7%**	**84.3%**	**55.1%**	**4.4%**	**55.7%**
OTHER CENTRES & STORES	Brighton	1.3%	0.9%	5.8%	0.0%	0.0%	0.0%	0.0%	2.2%	3.7%	68.0%	8.7%
	Crawley	0.0%	1.2%	0.7%	65.8%	63.7%	2.2%	1.0%	0.0%	0.0%	0.0%	15.9%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	7.5%	0.0%	0.0%	0.0%	0.7%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	2.7%	18.9%	2.5%
	Horsham	0.0%	0.0%	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.3%
	Lewes	0.0%	0.9%	1.0%	0.0%	0.0%	0.0%	6.4%	2.2%	0.8%	0.0%	0.8%
	Uckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	2.0%
	All Other Shops & Stores	0.0%	0.0%	0.0%	6.0%	11.5%	0.0%	2.7%	2.5%	20.5%	2.0%	4.1%
	INTERNET/ MAIL ORDER/ SFT	**15.6%**	**7.4%**	**4.2%**	**6.7%**	**9.4%**	**7.6%**	**11.8%**	**5.9%**	**13.4%**	**6.7%**	**9.3%**
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 3: MAIN FOOD (SECONDARY) SHOPPING - MARKET SHARE ANALYSIS (%)

Including Special Forms of Trading (SFT)*

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	8.3%	0.0%	1.2%	1.2%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	1.4%
	Haywards Heath TC: M&S, Orchards SC	18.8%	0.0%	14.8%	2.5%	0.0%	0.0%	5.4%	1.3%	0.0%	2.0%	3.8%
	HAYWARDS HEATH TOWN CENTRE: TOTAL	**42.3%**	**0.0%**	**22.4%**	**5.4%**	**0.0%**	**0.0%**	**12.1%**	**1.3%**	**0.0%**	**2.0%**	**7.8%**
	Burgess Hill Town Centre	3.7%	19.8%	1.2%	0.8%	0.0%	0.0%	1.7%	14.5%	6.2%	1.5%	4.2%
	Burgess Hill TC: Waitrose, The Martlets	13.3%	40.2%	30.6%	2.0%	0.0%	0.0%	6.6%	21.3%	18.5%	3.6%	10.5%
	BURGESS HILL TOWN CENTRE: TOTAL	**17.1%**	**61.6%**	**33.5%**	**2.9%**	**0.0%**	**0.0%**	**11.2%**	**37.6%**	**26.6%**	**5.1%**	**15.4%**
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.9%
	East Grinstead TC: Waitrose, West Street	0.0%	0.0%	0.0%	0.8%	1.6%	28.2%	1.2%	0.0%	0.0%	0.0%	5.7%
	EAST GRINSTEAD TOWN CENTRE: TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.8%**	**2.4%**	**34.5%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**7.0%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.2%	2.9%	0.0%	1.3%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.6%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
	Cuckfield	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.6%
	Haywards Heath: All Other Shops & Stores	15.2%	0.0%	6.4%	1.7%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	2.6%
	Burgess Hill: All Other Shops & Stores	0.0%	1.5%	1.7%	0.0%	0.0%	0.0%	2.9%	1.8%	1.8%	0.0%	0.7%
	East Grinstead: All Other Shops & Stores	0.0%	0.0%	0.0%	0.0%	0.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.4%
	MAIN VILLAGE CENTRES: SUB-TOTAL	**19.0%**	**1.5%**	**9.3%**	**1.7%**	**2.8%**	**1.4%**	**8.6%**	**31.0%**	**13.9%**	**0.0%**	**6.5%**
	Tesco, Jane Murray Way, Burgess Hill	20.3%	14.5%	17.4%	1.1%	0.0%	0.0%	6.1%	18.4%	8.1%	1.5%	6.8%
	Sainsbury's, Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	7.7%	34.7%	8.1%	0.0%	0.0%	0.0%	8.3%
	Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	1.1%	22.3%	2.0%	0.0%	0.0%	0.0%	4.5%
	Sainsbury's, Bannister Way, Haywards Heath	8.9%	11.8%	18.4%	2.6%	0.0%	0.0%	10.2%	4.5%	2.9%	0.0%	4.5%
	Other Out-of-Centre Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**29.2%**	**26.3%**	**35.8%**	**3.7%**	**8.8%**	**57.0%**	**26.4%**	**22.9%**	**11.0%**	**1.5%**	**24.1%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**92.4%**	**87.9%**	**92.9%**	**12.7%**	**13.3%**	**91.5%**	**52.1%**	**91.1%**	**49.6%**	**8.5%**	**57.2%**
OTHER CENTRES & STORES	Brighton	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	3.7%	6.1%	9.9%	49.5%	7.4%
	Crawley	0.0%	6.3%	1.2%	79.0%	76.6%	6.7%	0.0%	0.0%	0.0%	0.0%	20.3%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	5.0%	0.0%	0.0%	0.0%	0.6%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	16.6%	2.4%
	Horsham	0.0%	0.0%	2.4%	3.2%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	0.7%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	1.9%	0.0%	2.1%	0.8%
	Uckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	All Other Shops & Stores	1.3%	1.5%	1.2%	2.6%	9.1%	0.9%	22.2%	0.9%	24.4%	17.9%	7.6%
	INTERNET/ MAIL ORDER/ SFT	**6.3%**	**0.7%**	**2.4%**	**2.6%**	**1.1%**	**0.0%**	**10.6%**	**0.0%**	**3.5%**	**5.3%**	**3.0%**
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 4: TOP-UP FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

Including Special Forms of Trading (SFT)*

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	9.7%	1.0%	2.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.5%
	Haywards Heath TC: M&S, Orchards SC	11.6%	0.0%	7.1%	3.4%	1.4%	0.0%	8.8%	0.0%	0.0%	0.0%	2.9%
	HAYWARDS HEATH TOWN CENTRE: TOTAL	**21.2%**	**1.0%**	**9.1%**	**3.4%**	**1.4%**	**0.0%**	**10.1%**	**0.0%**	**0.0%**	**0.0%**	**4.4%**
	Burgess Hill Town Centre	0.0%	9.6%	1.0%	0.0%	0.0%	0.0%	0.0%	2.0%	5.1%	0.0%	1.6%
	Burgess Hill TC: Waitrose, The Martlets	1.3%	24.1%	5.3%	0.0%	0.0%	0.0%	1.9%	1.9%	0.0%	0.0%	3.4%
	BURGESS HILL TOWN CENTRE: TOTAL	**1.3%**	**33.7%**	**6.3%**	**0.0%**	**0.0%**	**0.0%**	**1.9%**	**3.8%**	**5.1%**	**0.0%**	**5.0%**
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	East Grinstead TC: Waitrose, West Street	0.0%	0.0%	0.0%	0.0%	0.0%	20.2%	1.3%	0.0%	0.0%	0.0%	3.9%
	EAST GRINSTEAD TOWN CENTRE: TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**23.2%**	**1.3%**	**0.0%**	**0.0%**	**0.0%**	**4.5%**
	Hassocks	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	70.2%	16.2%	1.6%	4.0%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.0%	0.0%	1.9%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	21.1%	1.3%	0.0%	0.0%	0.0%	0.0%	3.3%
	Cuckfield	0.0%	0.0%	13.7%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	Lindfield	6.4%	0.0%	0.0%	1.4%	0.0%	0.9%	5.4%	0.0%	0.0%	0.0%	1.5%
	Haywards Heath: All Other Shops & Stores	24.7%	0.0%	36.7%	2.8%	0.0%	0.0%	7.8%	0.0%	0.0%	0.0%	5.1%
	Burgess Hill: All Other Shops & Stores	0.9%	26.2%	3.0%	0.0%	0.0%	0.0%	3.1%	5.6%	1.4%	0.0%	3.9%
	East Grinstead: All Other Shops & Stores	0.0%	0.0%	0.0%	0.0%	2.3%	7.1%	0.0%	0.0%	0.0%	0.0%	1.7%
	VILLAGE CENTRES & OTHER STORES: SUB-TOTAL	**32.1%**	**27.6%**	**53.4%**	**4.2%**	**24.8%**	**9.2%**	**16.3%**	**75.8%**	**46.6%**	**1.6%**	**22.0%**
	Tesco, Jane Murray Way, Burgess Hill	5.9%	28.2%	6.4%	0.0%	0.0%	0.0%	4.0%	7.4%	0.0%	0.0%	4.9%
	Sainsbury's, Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.9%	40.0%	1.8%	0.0%	0.0%	0.0%	7.8%
	Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	13.9%	0.0%	0.0%	0.0%	0.0%	2.6%
	Sainsbury's, Bannister Way, Haywards Heath	37.5%	2.2%	15.6%	2.3%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	6.3%
	Other Out-of-Centre Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**43.4%**	**30.4%**	**22.1%**	**2.3%**	**0.9%**	**54.8%**	**12.8%**	**7.4%**	**0.0%**	**0.0%**	**21.8%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**98.0%**	**92.6%**	**90.9%**	**9.9%**	**27.1%**	**87.1%**	**42.4%**	**87.0%**	**51.7%**	**1.6%**	**57.7%**
OTHER CENTRES & STORES	Brighton	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	69.7%	8.8%
	Crawley	0.0%	0.9%	0.0%	67.8%	52.0%	4.7%	0.0%	0.0%	0.0%	0.0%	14.7%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	6.3%	0.8%
	Horsham	0.0%	0.0%	2.4%	2.7%	0.0%	0.0%	0.0%	0.9%	1.9%	0.0%	0.5%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	7.9%	0.0%	0.0%	0.7%
	Uckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	All Other Shops & Stores	2.0%	1.0%	4.7%	19.5%	17.6%	8.1%	51.1%	2.8%	46.4%	22.5%	16.2%
	INTERNET/ MAIL ORDER/ ETC	**0.0%**	**0.0%**	**2.0%**	**0.0%**	**3.2%**	**0.0%**	**1.8%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

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MID SUSSEX DISTRICT COUNCIL

Retail Study Update 2014

Comparison Goods Market Share Analysis

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TABLE 1: ALL COMPARISON GOOODS - 2014 MARKET SHARE ANALYSIS (%)

Including Special Forms of Trading*

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	36.4%	1.5%	23.1%	4.9%	0.1%	0.1%	18.0%	2.8%	2.3%	0.0%	7.8%
	Burgess Hill Town Centre	9.0%	41.5%	13.6%	0.7%	0.0%	0.0%	5.4%	27.4%	21.3%	1.8%	9.6%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	1.8%	5.2%	36.8%	1.4%	0.0%	0.0%	0.0%	8.1%
	MAIN TOWN CENTRES: TOTAL	**45.4%**	**43.0%**	**36.6%**	**7.4%**	**5.4%**	**36.9%**	**24.8%**	**30.3%**	**23.6%**	**1.8%**	**25.5%**
	Hassocks	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	8.8%	1.3%	0.4%	0.5%
	Hurstpierpoint	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.4%	3.7%	0.0%	0.3%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.3%	0.0%	2.5%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Lindfield	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.1%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.5%**	**0.1%**	**3.4%**	**0.4%**	**0.3%**	**0.0%**	**0.6%**	**10.2%**	**5.0%**	**0.4%**	**1.1%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.4%	1.1%	1.4%	0.0%	0.0%	0.0%	0.4%	0.6%	1.0%	0.0%	0.3%
	Wickes: London Road, Burgess Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.2%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.1%
	Other Out-of-Centre Stores: Burgess Hill	0.2%	0.9%	0.1%	0.0%	0.0%	0.0%	0.9%	1.4%	0.0%	0.0%	0.3%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.1%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.1%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.1%	1.8%	0.1%	0.0%	0.0%	0.0%	0.4%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.1%
	Sainsbury's: Bannister Way, Haywards Heath	0.6%	0.1%	1.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**1.5%**	**2.6%**	**2.9%**	**0.5%**	**0.3%**	**4.4%**	**1.3%**	**3.4%**	**1.0%**	**0.1%**	**1.8%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**47.4%**	**45.8%**	**42.9%**	**8.3%**	**5.9%**	**41.3%**	**26.6%**	**43.9%**	**29.6%**	**2.3%**	**28.3%**
OTHER CENTRES & STORES	Brighton	10.7%	14.1%	6.9%	2.4%	0.9%	3.1%	5.9%	26.8%	16.6%	58.7%	13.6%
	Crawley	13.5%	12.6%	18.3%	62.1%	58.1%	23.5%	4.5%	3.6%	4.1%	1.0%	22.8%
	Crowborough	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
	Croydon	0.9%	1.0%	0.3%	1.6%	1.9%	2.1%	0.0%	0.0%	0.4%	0.5%	1.1%
	Horsham	0.3%	0.5%	4.2%	1.9%	1.4%	0.0%	0.1%	0.5%	9.2%	0.4%	1.3%
	Hove	0.1%	0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	1.8%	6.1%	12.5%	2.1%
	Lewes	0.1%	0.2%	0.0%	0.0%	0.0%	0.1%	2.0%	0.3%	0.0%	0.3%	0.3%
	Shoreham	2.6%	0.8%	1.1%	0.1%	0.0%	0.1%	0.0%	1.1%	3.2%	2.9%	1.1%
	Tunbridge Wells	0.3%	0.2%	0.2%	0.5%	0.9%	7.8%	8.0%	0.0%	0.0%	0.0%	2.4%
	All Other Shops & Stores	2.9%	3.7%	5.5%	6.8%	6.9%	3.8%	23.0%	4.4%	13.8%	7.3%	7.1%
	INTERNET / MAIL ORDER/ ETC	**21.2%**	**20.2%**	**20.2%**	**16.3%**	**23.9%**	**18.2%**	**29.3%**	**17.8%**	**16.9%**	**14.2%**	**19.9%**
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Market share analysis informed by the August 2014 household telephone interview survey conducted by NEMS Market Research.

Notes: The total market shares for comparison goods shopping have been derived from the analysis for the different categories/types of comparison goods expenditure (Tables 2-12).

*Special Forms of Trading (SFT) comprises sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

MID SUSSEX DISTRICT COUNCIL
Retail Study Update 2014
Comparison Goods Market Share Analysis

TABLE 2: CLOTHING & FOOTWEAR - 2014 MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	21.6%	1.5%	13.3%	1.0%	0.0%	0.0%	15.5%	5.0%	0.9%	0.0%	5.0%
	Burgess Hill Town Centre	2.4%	14.0%	9.5%	0.0%	0.0%	0.0%	2.6%	13.2%	11.2%	0.0%	3.6%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	1.7%	3.7%	10.7%	1.1%	0.0%	0.0%	0.0%	2.8%
	MAIN TOWN CENTRES: TOTAL	**24.0%**	**15.5%**	**22.8%**	**2.6%**	**3.7%**	**10.7%**	**19.2%**	**18.1%**	**12.0%**	**0.0%**	**11.4%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	1.4%	0.0%	0.2%
	Hurstpierpoint	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.8%**	**1.4%**	**0.0%**	**0.2%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**24.0%**	**15.5%**	**23.6%**	**2.6%**	**3.7%**	**10.7%**	**19.2%**	**20.0%**	**13.4%**	**0.0%**	**11.5%**
OTHER CENTRES & STORES	Brighton	31.5%	34.9%	14.4%	4.6%	1.8%	7.8%	15.9%	51.7%	35.2%	71.0%	24.7%
	Crawley	23.0%	23.4%	24.1%	72.2%	70.0%	42.8%	8.6%	8.8%	9.8%	2.1%	33.0%
	Crowborough	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Croydon	0.0%	0.0%	0.0%	0.0%	1.4%	0.8%	0.0%	0.0%	0.0%	0.0%	0.4%
	Horsham	0.0%	1.2%	11.2%	2.9%	2.7%	0.0%	0.0%	0.8%	14.6%	0.9%	2.2%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.8%	3.4%	0.6%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
	Shoreham	1.7%	1.7%	3.3%	0.0%	0.0%	0.0%	0.0%	3.9%	3.4%	3.8%	1.3%
	Tunbridge Wells	1.0%	0.0%	0.7%	1.4%	2.2%	15.3%	16.8%	0.0%	0.0%	0.0%	4.8%
	All Other Shops & Stores	4.1%	7.8%	5.4%	8.5%	6.7%	5.7%	17.7%	4.6%	12.5%	8.2%	7.7%
	INTERNET / MAIL ORDER/ ETC	14.7%	15.5%	17.4%	7.1%	11.4%	16.9%	22.0%	8.5%	9.3%	10.6%	13.7%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 3: RECORDING MEDIA - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	14.1%	0.0%	3.2%	2.6%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	2.9%
	Burgess Hill Town Centre	0.0%	13.6%	1.1%	0.0%	0.0%	0.0%	1.1%	4.4%	7.0%	0.0%	2.4%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	2.2%
	MAIN TOWN CENTRES: TOTAL	**14.1%**	**13.6%**	**4.3%**	**2.6%**	**0.0%**	**12.0%**	**10.7%**	**4.4%**	**7.0%**	**0.0%**	**7.5%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	1.3%	1.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**1.3%**	**1.0%**	**1.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**15.4%**	**14.6%**	**5.7%**	**2.6%**	**0.0%**	**12.0%**	**10.7%**	**4.4%**	**7.0%**	**0.0%**	**7.9%**
OTHER CENTRES & STORES	Brighton	1.9%	4.1%	2.1%	3.1%	0.0%	6.5%	0.0%	14.0%	13.3%	32.7%	7.4%
	Crawley	6.3%	10.6%	15.6%	29.3%	23.2%	11.5%	1.5%	2.0%	5.5%	1.5%	11.5%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.1%
	Croydon	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Horsham	0.0%	1.4%	3.7%	1.4%	1.7%	0.0%	0.0%	0.0%	1.6%	0.0%	0.8%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Shoreham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.1%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	1.2%	4.3%	5.0%	0.0%	0.0%	0.0%	1.4%
	All Other Shops & Stores	2.2%	0.0%	0.0%	0.0%	0.0%	0.8%	3.4%	2.9%	7.9%	2.2%	1.5%
	INTERNET / MAIL ORDER/ ETC	74.3%	69.3%	72.9%	63.5%	72.6%	64.9%	78.3%	76.7%	63.2%	63.6%	69.1%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

MID SUSSEX DISTRICT COUNCIL

Retail Study Update 2014

Comparison Goods Market Share Analysis

TABLE 4: AUDIO-VISUAL, PHOTOGRAPHIC, COMPUTER ITEMS - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	28.3%	6.3%	14.2%	6.6%	0.0%	0.0%	13.7%	4.5%	1.1%	0.0%	6.7%
	Burgess Hill Town Centre	6.6%	10.0%	11.1%	1.1%	0.0%	0.0%	5.4%	9.6%	14.1%	1.1%	4.3%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.7%	16.4%	1.2%	0.0%	0.0%	0.0%	3.5%
	MAIN TOWN CENTRES: TOTAL	**35.0%**	**16.3%**	**25.3%**	**7.7%**	**0.7%**	**16.4%**	**20.3%**	**14.1%**	**15.2%**	**1.1%**	**14.5%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.2%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.0%**	**0.0%**	**0.0%**	**0.2%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.8%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**0.0%**	**0.0%**	**0.2%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**35.7%**	**17.2%**	**25.3%**	**7.7%**	**0.7%**	**16.4%**	**20.3%**	**21.3%**	**15.2%**	**1.1%**	**15.0%**
OTHER CENTRES & STORES	Brighton	3.5%	9.8%	5.4%	2.2%	0.0%	0.0%	5.0%	25.1%	14.3%	41.0%	9.2%
	Crawley	14.5%	22.5%	25.7%	61.8%	40.8%	37.3%	9.1%	0.0%	4.5%	1.1%	24.0%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.1%
	Croydon	0.8%	0.0%	1.3%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	1.1%	1.5%
	Horsham	0.0%	0.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%	0.0%	0.8%
	Hove	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	7.8%	24.4%	4.2%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Shoreham	0.8%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.4%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	7.8%	0.0%	0.0%	0.0%	2.3%
	All Other Shops & Stores	1.1%	1.7%	2.8%	0.8%	2.7%	0.0%	9.2%	1.1%	7.6%	4.4%	2.7%
	INTERNET / MAIL ORDER/ ETC	43.6%	43.9%	38.6%	27.6%	55.8%	32.0%	47.0%	42.1%	38.6%	27.0%	39.8%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 5: DOMESTIC ELECTRICAL & WHITE GOODS - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	40.8%	0.0%	30.4%	7.9%	0.0%	0.0%	17.7%	4.5%	1.8%	0.0%	8.9%
	Burgess Hill Town Centre	15.7%	47.8%	23.6%	0.9%	0.0%	0.0%	5.6%	34.2%	24.4%	0.9%	12.0%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	2.3%	8.0%	1.1%	0.0%	0.0%	0.0%	2.1%
	MAIN TOWN CENTRES: TOTAL	**56.5%**	**47.8%**	**53.9%**	**8.8%**	**2.3%**	**8.0%**	**24.3%**	**38.7%**	**26.2%**	**0.9%**	**23.0%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.9%	0.0%	0.3%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**0.0%**	**0.0%**	**0.0%**	**6.9%**	**0.9%**	**0.0%**	**0.4%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.1%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.4%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.9%**	**0.7%**	**0.0%**	**3.8%**	**0.0%**	**2.9%**	**0.0%**	**0.0%**	**1.0%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**56.5%**	**47.8%**	**54.8%**	**10.6%**	**2.3%**	**11.8%**	**24.3%**	**48.4%**	**27.1%**	**0.9%**	**24.4%**
OTHER CENTRES & STORES	Brighton	0.0%	3.3%	0.0%	1.0%	0.0%	0.0%	2.2%	14.4%	8.8%	47.7%	6.4%
	Crawley	17.9%	13.8%	17.5%	58.5%	53.5%	35.6%	4.1%	0.0%	1.8%	0.0%	24.8%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.2%
	Croydon	0.0%	0.0%	1.3%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	1.5%
	Horsham	1.0%	0.8%	1.2%	1.4%	0.0%	0.0%	0.0%	1.0%	7.2%	0.0%	0.9%
	Hove	1.4%	1.2%	1.7%	0.0%	0.0%	0.0%	0.0%	1.0%	15.0%	23.3%	3.7%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%
	Shoreham	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	2.2%	0.8%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	4.7%	0.0%	0.0%	0.0%	1.6%
	All Other Shops & Stores	0.9%	1.6%	1.2%	0.9%	4.6%	5.6%	15.2%	1.4%	5.5%	10.0%	4.9%
	INTERNET / MAIL ORDER/ ETC	22.2%	29.8%	22.5%	27.5%	39.5%	34.0%	46.3%	33.8%	29.5%	15.8%	30.9%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 6: BOOKS & STATIONERY- MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	57.5%	1.4%	42.7%	11.1%	0.0%	0.0%	23.1%	3.2%	3.3%	0.0%	12.1%
	Burgess Hill Town Centre	3.8%	43.4%	11.6%	0.7%	0.0%	0.0%	2.4%	21.9%	17.6%	1.5%	8.2%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	4.6%	44.3%	0.8%	0.0%	0.0%	0.0%	9.4%
	MAIN TOWN CENTRES: TOTAL	**61.3%**	**44.8%**	**54.3%**	**11.8%**	**4.6%**	**44.3%**	**26.2%**	**25.1%**	**20.9%**	**1.5%**	**29.7%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.6%	3.0%	0.0%	1.2%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.2%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**27.3%**	**6.3%**	**0.0%**	**1.6%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.6%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.2%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.6%**	**0.0%**	**1.0%**	**0.7%**	**0.7%**	**0.0%**	**0.0%**	**1.7%**	**0.0%**	**0.0%**	**0.3%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**62.8%**	**44.8%**	**55.3%**	**12.5%**	**5.3%**	**44.3%**	**26.2%**	**54.1%**	**27.2%**	**1.5%**	**31.6%**
OTHER CENTRES & STORES	Brighton	0.9%	3.3%	2.8%	1.0%	0.0%	0.0%	0.0%	3.0%	7.8%	56.8%	7.9%
	Crawley	0.0%	6.5%	8.0%	46.7%	48.5%	7.3%	0.0%	0.0%	0.0%	0.0%	12.8%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Croydon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Horsham	0.0%	0.0%	1.8%	0.7%	0.0%	0.0%	0.0%	0.9%	7.9%	0.0%	0.7%
	Hove	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	8.9%	1.2%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.9%	0.0%	0.0%	0.3%
	Shoreham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.2%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	2.4%	0.0%	0.0%	0.0%	0.4%
	All Other Shops & Stores	0.9%	1.2%	1.1%	1.0%	1.0%	1.0%	18.4%	0.8%	10.7%	2.5%	3.5%
	INTERNET / MAIL ORDER/ ETC	35.3%	44.2%	31.0%	38.1%	43.1%	47.4%	50.0%	40.4%	43.7%	30.3%	41.4%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 7: GAMES/TOYS; PETS/ HOBBY ITEMS/ SPORT EQUIPMENT/ CAMPING GOODS/ BICYCLES/ MUSICAL INSTRUMENTS - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	37.7%	1.4%	19.4%	6.7%	0.0%	0.0%	15.4%	0.0%	0.0%	0.0%	7.6%
	Burgess Hill Town Centre	11.6%	62.6%	7.3%	0.8%	0.0%	0.0%	6.4%	29.6%	25.7%	1.6%	12.6%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	1.1%	7.5%	44.1%	0.0%	0.0%	0.0%	0.0%	9.6%
	MAIN TOWN CENTRES: TOTAL	**49.3%**	**64.0%**	**26.7%**	**8.7%**	**7.5%**	**44.1%**	**21.8%**	**29.6%**	**25.7%**	**1.6%**	**29.8%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	2.1%	0.5%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.8%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	1.9%	0.0%	4.3%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**1.9%**	**0.0%**	**5.9%**	**0.8%**	**0.0%**	**0.0%**	**0.0%**	**10.2%**	**11.3%**	**2.1%**	**1.9%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	1.6%	1.4%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.3%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.8%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%
	Sainsbury's: Bannister Way, Haywards Heath	1.2%	0.0%	1.6%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**1.2%**	**1.6%**	**4.4%**	**0.8%**	**0.0%**	**5.4%**	**0.0%**	**3.3%**	**0.0%**	**0.0%**	**1.7%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**52.4%**	**65.5%**	**37.0%**	**10.3%**	**7.5%**	**49.6%**	**21.8%**	**43.1%**	**37.0%**	**3.7%**	**33.3%**
OTHER CENTRES & STORES	Brighton	0.0%	1.6%	2.7%	3.2%	0.0%	6.5%	1.3%	15.7%	7.3%	39.5%	7.2%
	Crawley	16.4%	5.9%	17.4%	52.6%	57.9%	10.5%	2.0%	0.0%	1.5%	0.0%	18.7%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Croydon	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Horsham	0.0%	0.0%	2.1%	1.2%	0.8%	0.0%	0.0%	1.4%	6.9%	1.6%	1.0%
	Hove	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.8%	14.7%	2.6%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	2.3%	0.3%
	Shoreham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.2%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	2.0%	0.0%	0.0%	0.0%	0.9%
	All Other Shops & Stores	0.0%	0.0%	15.3%	1.7%	2.4%	2.7%	27.4%	2.9%	11.1%	8.5%	5.7%
	INTERNET / MAIL ORDER/ ETC	30.3%	25.6%	25.5%	31.0%	31.4%	26.7%	44.4%	36.8%	23.4%	28.2%	29.9%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

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TABLE 8: FURNITURE, CARPETS, OTHER FLOOR COVERINGS & HOUSEHOLD TEXTILES - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	30.9%	0.0%	27.6%	0.0%	1.2%	0.0%	20.9%	4.5%	1.3%	0.0%	6.9%
	Burgess Hill Town Centre	8.3%	54.5%	14.8%	1.3%	0.0%	0.0%	7.7%	46.4%	17.6%	3.7%	12.2%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	8.4%	5.7%	43.5%	2.5%	0.0%	0.0%	0.0%	9.9%
	MAIN TOWN CENTRES: TOTAL	**39.2%**	**54.5%**	**42.4%**	**9.7%**	**6.8%**	**43.5%**	**31.1%**	**50.9%**	**18.9%**	**3.7%**	**29.0%**
	Hassocks	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.2%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.1%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.3%	0.0%	0.0%	0.2%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.7%**	**1.5%**	**0.0%**	**0.0%**	**0.0%**	**1.5%**	**5.9%**	**0.0%**	**0.0%**	**0.5%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	1.4%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**8.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.6%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**39.2%**	**55.2%**	**43.9%**	**9.7%**	**6.8%**	**51.9%**	**32.6%**	**56.8%**	**18.9%**	**3.7%**	**31.1%**
OTHER CENTRES & STORES	Brighton	6.8%	8.8%	8.0%	0.9%	1.1%	1.0%	4.0%	26.8%	15.0%	41.4%	9.8%
	Crawley	14.3%	7.1%	20.9%	56.9%	43.2%	22.6%	4.7%	2.0%	4.4%	2.2%	19.4%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Croydon	5.6%	8.0%	1.1%	11.9%	11.5%	7.3%	0.0%	0.0%	1.9%	3.1%	6.3%
	Horsham	2.1%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.9%
	Hove	0.0%	2.3%	1.1%	0.0%	0.0%	0.0%	0.0%	2.0%	15.5%	23.0%	4.2%
	Lewes	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.2%
	Shoreham	11.5%	2.1%	1.7%	0.9%	0.0%	0.7%	0.0%	1.3%	4.3%	7.8%	3.3%
	Tunbridge Wells	0.0%	1.4%	0.0%	0.9%	1.2%	9.0%	7.9%	0.0%	0.0%	0.0%	2.7%
	All Other Shops & Stores	2.3%	5.7%	7.7%	11.4%	13.7%	5.7%	27.1%	7.4%	25.8%	18.7%	11.6%
	INTERNET / MAIL ORDER/ ETC	16.9%	9.6%	15.6%	5.5%	22.5%	1.9%	22.6%	3.8%	7.5%	0.0%	10.5%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 9: DIY, DECORATING SUPPLIES & GARDEN PRODUCTS - MARKET SHARE ANALYSIS (%)

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	7.3%	0.0%	12.2%	4.7%	0.0%	0.0%	5.6%	1.1%	1.0%	0.0%	2.3%
	Burgess Hill Town Centre	58.4%	47.9%	37.6%	1.4%	0.0%	0.0%	12.8%	37.3%	44.5%	3.6%	20.6%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	2.8%	12.3%	55.3%	7.2%	0.0%	0.0%	0.0%	13.6%
	MAIN TOWN CENTRES: TOTAL	**65.7%**	**47.9%**	**49.8%**	**8.9%**	**12.3%**	**55.3%**	**25.6%**	**38.4%**	**45.5%**	**3.6%**	**36.5%**
	Hassocks	0.0%	0.7%	1.2%	0.0%	0.0%	0.0%	0.9%	14.0%	4.8%	1.0%	1.3%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	0.3%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.7%**	**1.2%**	**1.0%**	**0.0%**	**0.0%**	**0.9%**	**20.4%**	**4.8%**	**1.0%**	**1.6%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	8.1%	21.4%	18.2%	1.0%	0.0%	0.0%	6.4%	10.3%	16.7%	0.0%	6.4%
	Wickes: London Road, Burgess Hill	1.0%	1.5%	0.0%	0.7%	0.0%	0.0%	0.0%	0.8%	0.0%	1.0%	0.5%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Out-of-Centre Stores: Burgess Hill	4.4%	15.8%	2.1%	0.0%	0.0%	0.0%	13.5%	22.9%	0.0%	0.0%	4.6%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	2.0%	4.7%	0.0%	0.0%	0.0%	0.0%	1.2%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	2.7%	29.0%	1.2%	0.0%	0.0%	0.0%	6.2%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**13.5%**	**38.7%**	**21.2%**	**1.7%**	**4.6%**	**33.6%**	**21.1%**	**34.0%**	**16.7%**	**1.0%**	**19.0%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**79.2%**	**87.3%**	**72.1%**	**11.6%**	**16.9%**	**88.9%**	**47.5%**	**92.8%**	**67.0%**	**5.7%**	**57.0%**
OTHER CENTRES & STORES	Brighton	1.5%	1.8%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	58.7%	6.7%
	Crawley	5.1%	7.1%	23.0%	82.2%	72.2%	9.9%	2.3%	0.0%	1.4%	0.0%	20.5%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Croydon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Horsham	0.7%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%	0.7%
	Hove	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	1.1%	1.0%	28.6%	3.2%
	Lewes	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	12.3%	1.1%	0.0%	0.0%	1.4%
	Shoreham	0.7%	0.0%	1.3%	0.7%	0.0%	0.0%	0.0%	0.0%	12.4%	7.0%	1.9%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	6.7%	0.0%	0.0%	0.0%	0.9%
	All Other Shops & Stores	8.9%	0.0%	1.8%	1.0%	4.9%	0.0%	28.7%	2.8%	11.0%	0.0%	5.6%
	INTERNET / MAIL ORDER/ ETC	3.9%	2.6%	0.9%	2.0%	6.0%	0.0%	1.2%	2.2%	2.0%	0.0%	2.2%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

MID SUSSEX DISTRICT COUNCIL

Retail Study Update 2014

Comparison Goods Market Share Analysis

TABLE 10: **PERSONAL CARE: INCLUDING ELECTRIC APPLIANCES** (e.g. hair dryers, etc)**; NON-ELECTRIC APPLIANCES** (e.g. scissors, hand razors, etc.)**; & COSMETICS/ PERFUMES/ ETC - MARKET SHARE ANALYSIS (%)**

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	67.5%	0.0%	48.3%	10.1%	0.0%	0.0%	31.0%	1.1%	1.4%	0.0%	13.7%
	Burgess Hill Town Centre	9.4%	79.9%	21.8%	1.6%	0.0%	0.0%	10.4%	59.3%	49.8%	3.9%	18.1%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	7.5%	87.7%	0.8%	0.0%	0.0%	0.0%	17.7%
	MAIN TOWN CENTRES: TOTAL	**76.9%**	**79.9%**	**70.1%**	**11.6%**	**7.5%**	**87.7%**	**42.1%**	**60.5%**	**51.2%**	**3.9%**	**49.5%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	2.3%	0.0%	0.6%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	1.8%	0.0%	0.2%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.8%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**11.1%**	**4.1%**	**0.0%**	**0.8%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.6%	1.8%	1.1%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.6%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.7%
	Sainsbury's: Bannister Way, Haywards Heath	2.4%	0.7%	5.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**3.0%**	**2.5%**	**6.1%**	**1.3%**	**0.0%**	**3.9%**	**0.0%**	**6.7%**	**0.0%**	**0.0%**	**2.0%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**79.9%**	**82.5%**	**77.0%**	**12.9%**	**7.5%**	**91.6%**	**43.2%**	**78.2%**	**55.3%**	**3.9%**	**52.2%**
OTHER CENTRES & STORES	Brighton	3.0%	4.2%	9.1%	0.0%	0.0%	0.0%	2.3%	16.6%	6.9%	80.0%	12.0%
	Crawley	2.2%	1.3%	2.5%	72.8%	70.2%	3.6%	0.8%	0.0%	1.3%	0.0%	18.1%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Croydon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Horsham	0.0%	0.0%	2.7%	2.1%	1.5%	0.0%	0.0%	0.0%	7.5%	0.0%	1.0%
	Hove	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	1.2%	3.4%	8.8%	1.3%
	Lewes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.3%
	Shoreham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.9%	0.4%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	5.4%	0.0%	0.0%	0.0%	0.6%
	All Other Shops & Stores	3.5%	4.2%	1.1%	3.7%	11.1%	1.9%	30.8%	1.1%	11.7%	2.6%	6.7%
	INTERNET / MAIL ORDER/ ETC	11.4%	7.9%	6.8%	8.5%	9.8%	1.7%	12.9%	2.8%	8.7%	3.9%	7.3%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 11: **MEDICAL GOODS; OTHER PHARMACEUTICAL PRODUCTS** (e.g. vitamins, plasters, etc.)**; & THERAPEUTIC EQUIPMENT** (e.g. spectacles, contact lenses, etc.) **- MARKET SHARE ANALYSIS (%)**

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	85.9%	0.7%	45.1%	15.0%	0.0%	0.0%	33.5%	1.0%	0.0%	0.0%	16.7%
	Burgess Hill Town Centre	3.3%	88.8%	6.1%	0.6%	0.0%	0.0%	2.3%	34.1%	20.0%	3.1%	14.3%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	10.7%	89.7%	2.3%	0.0%	0.0%	0.0%	18.7%
	MAIN TOWN CENTRES: TOTAL	**89.2%**	**89.6%**	**51.2%**	**15.6%**	**10.7%**	**89.7%**	**38.1%**	**35.1%**	**20.0%**	**3.1%**	**49.7%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	55.2%	7.2%	1.6%	3.0%
	Hurstpierpoint	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.8%	34.1%	0.0%	2.5%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	Cuckfield	0.0%	0.0%	35.4%	0.6%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
	Lindfield	4.6%	0.0%	0.9%	2.5%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	1.2%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**4.6%**	**0.0%**	**42.3%**	**4.3%**	**6.1%**	**0.0%**	**4.8%**	**56.7%**	**41.3%**	**1.6%**	**8.7%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.6%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.7%
	Sainsbury's: Bannister Way, Haywards Heath	3.1%	0.7%	3.2%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**3.1%**	**1.3%**	**4.1%**	**1.2%**	**0.0%**	**3.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.4%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**96.9%**	**90.9%**	**97.6%**	**21.2%**	**16.8%**	**93.3%**	**42.9%**	**91.8%**	**61.3%**	**4.7%**	**59.9%**
OTHER CENTRES & STORES	Brighton	0.0%	2.9%	0.7%	0.0%	0.0%	0.0%	0.8%	3.0%	1.7%	71.7%	9.3%
	Crawley	0.0%	1.2%	0.0%	50.1%	66.9%	2.0%	0.0%	0.0%	0.0%	0.0%	14.3%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.1%
	Croydon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Horsham	0.0%	0.0%	0.7%	1.2%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.2%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	6.9%	1.0%
	Lewes	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.5%
	Shoreham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.8%	0.2%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%
	All Other Shops & Stores	1.8%	4.0%	0.0%	23.5%	9.7%	2.9%	42.3%	5.3%	30.5%	12.2%	11.6%
	INTERNET / MAIL ORDER/ ETC	1.3%	0.0%	1.0%	4.0%	6.5%	0.9%	8.3%	0.0%	1.2%	3.8%	2.9%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

TABLE 12: **ALL OTHER COMPARISON GOODS** (incl jewellery, watches, glassware, china, tableware, etc.) **& OTHER PERSONAL EFFECTS** (incl travel goods, suitcases, prams) **- MARKET SHARE ANALYSIS (%)**

	ZONES	1	2	3	4	5	6	7	8	9	10	TOTAL STUDY AREA
MID SUSSEX DISTRICT	Haywards Heath Town Centre	39.0%	3.0%	22.0%	2.8%	0.0%	1.3%	16.6%	1.5%	17.4%	0.0%	9.0%
	Burgess Hill Town Centre	2.2%	30.1%	15.1%	0.0%	0.0%	0.0%	2.0%	15.1%	10.8%	2.2%	5.9%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	1.3%	3.0%	29.9%	0.0%	0.0%	0.0%	0.0%	6.4%
	MAIN TOWN CENTRES: TOTAL	**41.2%**	**33.2%**	**37.2%**	**4.1%**	**3.0%**	**31.1%**	**18.6%**	**16.7%**	**28.2%**	**2.2%**	**21.2%**
	Hassocks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.1%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lindfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER MID SUSSEX CENTRES & STORES: SUB-TOTAL	**0.0%**	**0.0%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.2%**	**0.0%**	**0.0%**	**0.1%**
	Mid Sussex Retail Park: Burgess Hill (B&Q/Pets at Home)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes: London Road, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Out-of-Centre Stores: Burgess Hill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's: Bannister Way, Haywards Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE STORES: SUB-TOTAL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**41.2%**	**33.2%**	**38.4%**	**4.1%**	**3.0%**	**31.1%**	**18.6%**	**18.9%**	**28.2%**	**2.2%**	**21.4%**
OTHER CENTRES & STORES	Brighton	16.6%	27.3%	6.9%	2.7%	4.2%	0.0%	7.9%	45.1%	28.3%	77.3%	19.8%
	Crawley	11.3%	16.4%	21.7%	58.3%	53.5%	26.8%	4.5%	14.7%	2.4%	0.0%	22.9%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.1%
	Croydon	0.0%	0.0%	0.0%	3.3%	1.3%	0.9%	0.0%	0.0%	2.6%	0.0%	0.8%
	Horsham	0.0%	1.0%	7.7%	2.2%	4.8%	0.0%	1.5%	0.0%	13.9%	0.0%	2.3%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.8%
	Lewes	0.0%	1.0%	0.0%	0.0%	0.0%	1.4%	2.0%	0.0%	0.0%	0.0%	0.5%
	Shoreham	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	1.4%
	Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	1.3%	13.2%	8.6%	0.0%	0.0%	0.0%	3.5%
	All Other Shops & Stores	5.6%	2.0%	4.2%	18.2%	10.4%	8.6%	28.5%	14.0%	14.2%	0.0%	9.4%
	INTERNET / MAIL ORDER/ ETC	16.3%	19.2%	21.0%	11.2%	21.6%	18.1%	27.1%	7.3%	10.5%	11.8%	17.1%
TOTAL MARKET SHARE ANALYSIS		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: Including SFT

6

Goad Category Report

Burgess Hill

Survey Date: **21/08/2013**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area

When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System

A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report

This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report

Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner

Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans

These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans

Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts

We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database

An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail: goad.sales@uk.experian.com

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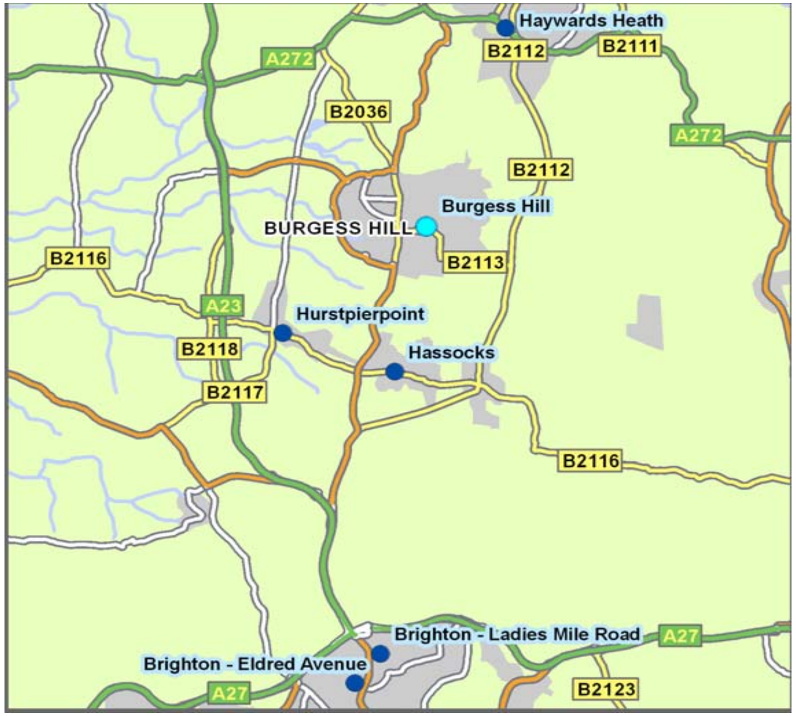


Nearest Location	Distance KM
Hassocks	3.53
Hurstpierpoint	4.08
Haywards Heath	5.07
Brighton - Ladies Mile Road	10.23
Brighton - Eldred Avenue	11.00

Major Retailers Present

Department Stores

BhS	0
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	0

Mixed Goods Retailers

Argos	1
Boots the Chemist	1
T K Maxx	0
W H Smith	1
Wilkinson	1

Supermarkets

Sainsburys	0
Tesco	0
Waitrose	1

Clothing

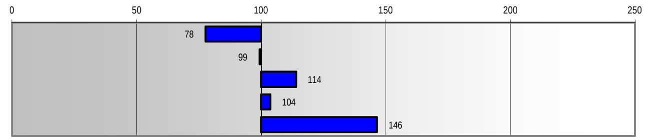
Burton	0
Dorothy Perkins	0
H & M	0
New Look	1
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

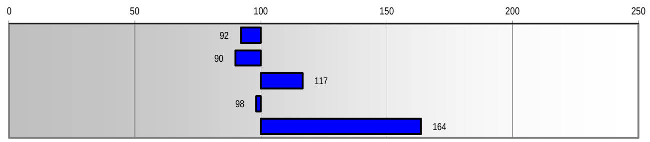
Carphone Warehouse	0
Clarks	1
Clintons	1
H M V	0
O2	0
Superdrug	1
Phones 4 U	1
Vodafone	0
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	21	33.33	42.92	78
Convenience	7	11.11	11.19	99
Retail Service	7	11.11	9.74	114
Leisure Services	13	20.63	19.89	104
Financial & Business Services	15	23.81	16.26	146
Total Multiple Outlets	63			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	84,500	44.03	47.85	92
Convenience	39,600	20.64	22.96	90
Retail Service	10,600	5.52	4.74	117
Leisure Services	29,300	15.27	15.56	98
Financial & Business Services	27,900	14.54	8.88	164
Total Multiple Floorspace	191,900			



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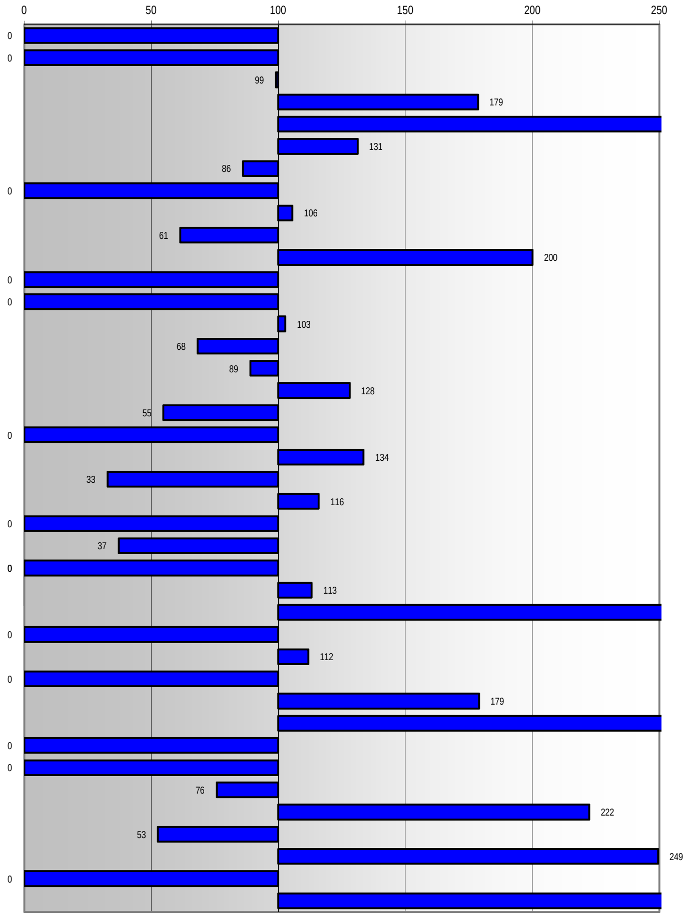
Base: All UK Centres

Sector	Classification	Outlets	Area %	Base %	Index
Comparison		Outlets	Area %	Base %	Index
	Antique Shops	0	0.00	0.41	0
	Art & Art Dealers	0	0.00	0.63	0
	Booksellers	1	0.49	0.49	99
	Carpets & Flooring	2	0.98	0.55	179
	Catalogue Showrooms	1	0.49	0.14	362
	Charity Shops	7	3.43	2.62	131
	Chemist & Drugstores	2	0.98	1.14	86
	Childrens & Infants Wear	0	0.00	0.45	0
	Clothing General	4	1.96	1.86	106
	Crafts, Gifts, China & Glass	2	0.98	1.60	61
	Cycles & Accessories	1	0.49	0.25	200
	Department & Variety Stores	0	0.00	0.37	0
	DIY & Home Improvement	0	0.00	0.69	0
	Electrical & Other Durable Goods	3	1.47	1.43	103
	Florists	1	0.49	0.72	68
	Footwear	2	0.98	1.10	89
	Furniture Fitted	1	0.49	0.38	128
	Furniture General	1	0.49	0.90	55
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	2	0.98	0.73	134
	Hardware & Household Goods	1	0.49	1.50	33
	Jewellery, Watches & Silver	4	1.96	1.69	116
	Ladies & Mens Wear & Acc.	0	0.00	1.41	0
	Ladies Wear & Accessories	2	0.98	2.64	37
	Leather & Travel Goods	0	0.00	0.17	0
	Mens Wear & Accessories	2	0.98	0.87	113
	Music & Musical Instruments	1	0.49	0.15	322
	Music & Video Recordings	0	0.00	0.19	0
	Newsagents & Stationers	3	1.47	1.32	112
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	3	1.47	0.82	179
	Photographic & Optical	1	0.49	0.13	384
	Secondhand Goods, Books, etc.	0	0.00	0.32	0
	Sports, Camping & Leisure Goods	0	0.00	0.75	0
	Telephones & Accessories	2	0.98	1.29	76
	Textiles & Soft Furnishings	3	1.47	0.66	222
	Toiletries, Cosmetics & Beauty Products	1	0.49	0.93	53
	Toys, Games & Hobbies	4	1.96	0.79	249
	Vehicle & Motorcycle Sales	0	0.00	0.27	0
	Vehicle Accessories	1	0.49	0.19	258
	Totals	58	28.43	32.62	87



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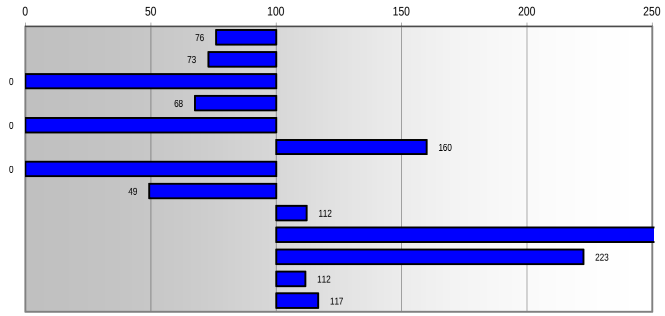
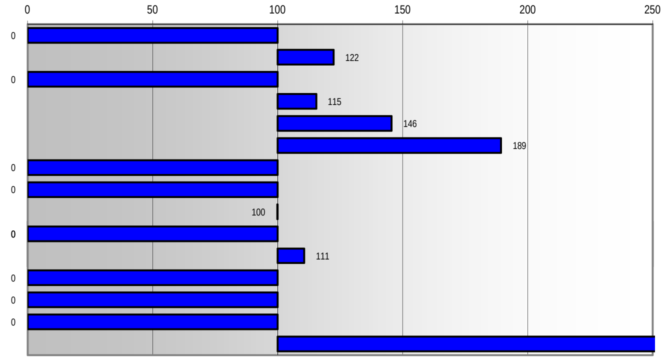
Outlet Counts

Centre: Burgess Hill **Survey Date:** 21/08/2013

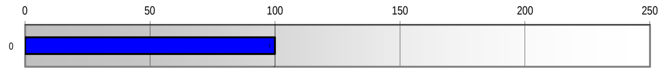
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	3	1.47	1.93	76
Butchers	1	0.49	0.67	73
CTN	0	0.00	0.26	0
Convenience Stores	2	0.98	1.45	68
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.49	0.31	160
Greengrocers	0	0.00	0.31	0
Grocers & Delicatessens	1	0.49	0.99	49
Health Foods	1	0.49	0.44	112
Markets	1	0.49	0.12	401
Off Licences	2	0.98	0.44	223
Shoe Repairs Etc	1	0.49	0.44	112
Supermarkets	2	0.98	0.84	117
Total Convenience	**15**	**7.35**	**8.33**	88



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	2	0.98	0.80	122
Filling Stations	0	0.00	0.22	0
Health & Beauty	20	9.80	8.49	115
Opticians	4	1.96	1.35	146
Other Retail Services	2	0.98	0.52	189
Photo Processing	0	0.00	0.14	0
Photo Studio	0	0.00	0.17	0
Post Offices	1	0.49	0.49	100
Repairs, Alterations & Restoration	0	0.00	0.22	0
Travel Agents	2	0.98	0.89	111
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	0	0.00	0.51	0
Video Tape Rental	2	0.98	0.09	1,077
Totals	**33**	**16.18**	**14.06**	**115**



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.15**	**0**



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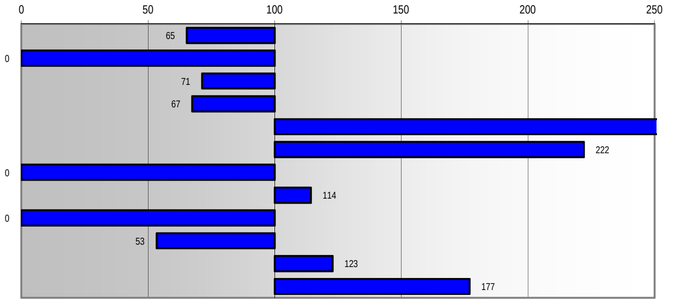
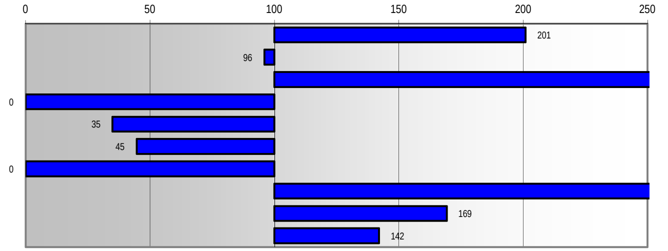
Outlet Counts

Centre: **Burgess Hill** **Survey Date:** **21/08/2013**

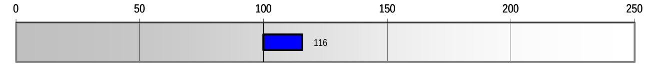
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	2	0.98	1.50	65
Bingo & Amusements	0	0.00	0.42	0
Cafes	6	2.94	4.12	71
Casinos & Betting Offices	2	0.98	1.45	67
Cinemas, Theatres & Concert Halls	2	0.98	0.25	385
Clubs	3	1.47	0.66	222
Disco, Dance & Nightclubs	0	0.00	0.25	0
Fast Food & Take Away	13	6.37	5.57	114
Hotels & Guest Houses	0	0.00	0.66	0
Public Houses	3	1.47	2.76	53
Restaurants	11	5.39	4.39	123
Sports & Leisure Facilities	1	0.49	0.28	177
Totals	**43**	**21.08**	**22.32**	**94**



Financial & Business Services				
Building Societies	2	0.98	0.49	201
Building Supplies & Services	1	0.49	0.51	96
Business Goods & Services	1	0.49	0.03	1,903
Employment & Careers	0	0.00	0.42	0
Financial Services	1	0.49	1.40	35
Legal Services	1	0.49	1.10	45
Other Business Services	0	0.00	0.40	0
Printing & Copying	2	0.98	0.32	305
Property Services	12	5.88	3.47	169
Retail Banks	8	3.92	2.76	142
Totals	**28**	**13.73**	**10.90**	**126**

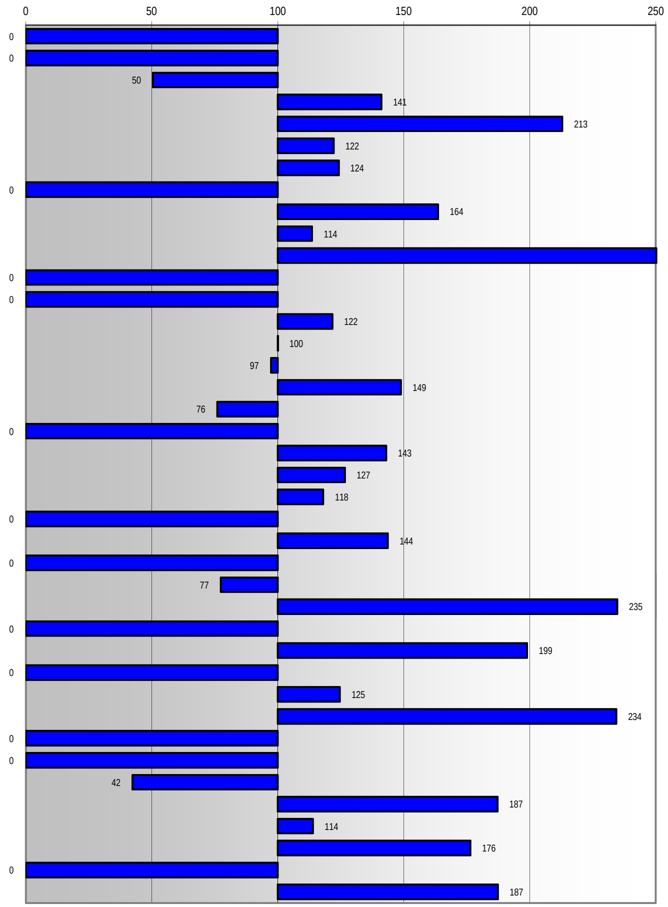


Vacant Outlets				
Vacant Retail & Service Outlets	**27**	**13.24**	**11.45**	**116**



Total Number of Outlets **204**

Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.22	0
	Art & Art Dealers	0	0.00	0.36	0
	Booksellers	800	0.21	0.42	50
	Carpets & Flooring	2,900	0.76	0.54	141
	Catalogue Showrooms	4,200	1.10	0.52	213
	Charity Shops	7,900	2.07	1.69	122
	Chemist & Drugstores	7,400	1.94	1.56	124
	Childrens & Infants Wear	0	0.00	0.36	0
	Clothing General	20,700	5.42	3.31	164
	Crafts, Gifts, China & Glass	3,500	0.92	0.81	114
	Cycles & Accessories	1,800	0.47	0.19	250
	Department & Variety Stores	0	0.00	4.56	0
	DIY & Home Improvement	0	0.00	1.14	0
	Electrical & Other Durable Goods	5,400	1.41	1.16	122
	Florists	1,000	0.26	0.26	100
	Footwear	3,400	0.89	0.92	97
	Furniture Fitted	2,000	0.52	0.35	149
	Furniture General	4,100	1.07	1.41	76
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	2,700	0.71	0.49	143
	Hardware & Household Goods	17,400	4.56	3.60	127
	Jewellery, Watches & Silver	3,300	0.86	0.73	118
	Ladies & Mens Wear & Acc.	0	0.00	1.78	0
	Ladies Wear & Accessories	13,300	3.48	2.43	144
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	2,100	0.55	0.71	77
	Music & Musical Instruments	900	0.24	0.10	235
	Music & Video Recordings	0	0.00	0.18	0
	Newsagents & Stationers	7,200	1.89	0.95	199
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	2,800	0.73	0.59	125
	Photographic & Optical	500	0.13	0.06	234
	Secondhand Goods, Books, etc.	0	0.00	0.16	0
	Sports, Camping & Leisure Goods	0	0.00	0.99	0
	Telephones & Accessories	1,100	0.29	0.68	42
	Textiles & Soft Furnishings	3,500	0.92	0.49	187
	Toiletries, Cosmetics & Beauty Products	3,800	1.00	0.87	114
	Toys, Games & Hobbies	4,400	1.15	0.65	176
	Vehicle & Motorcycle Sales	0	0.00	0.54	0
	Vehicle Accessories	1,600	0.42	0.22	187
	Totals	**129,700**	**33.98**	**36.25**	**94**



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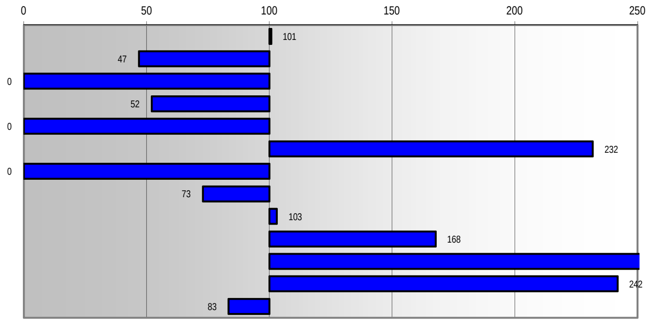
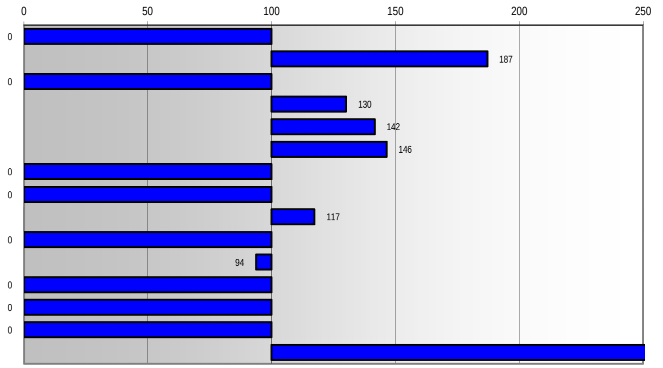
Floorspace Sq Ft

Centre: **Burgess Hill** **Survey Date:** **21/08/2013**

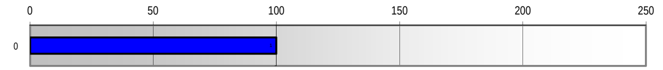
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	3,500	0.92	0.91	101
Butchers	600	0.16	0.34	47
CTN	0	0.00	0.12	0
Convenience Stores	3,100	0.81	1.56	52
Fishmongers	0	0.00	0.05	0
Frozen Foods	7,400	1.94	0.84	232
Greengrocers	0	0.00	0.15	0
Grocers & Delicatessens	1,500	0.39	0.54	73
Health Foods	1,000	0.26	0.25	103
Markets	5,800	1.52	0.91	168
Off Licences	2,500	0.65	0.25	260
Shoe Repairs Etc	1,100	0.29	0.12	242
Supermarkets	28,300	7.41	8.89	83
Total Convenience	**54,800**	**14.36**	**14.92**	**96**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	2,400	0.63	0.34	187
Filling Stations	0	0.00	0.12	0
Health & Beauty	18,900	4.95	3.81	130
Opticians	4,200	1.10	0.78	142
Other Retail Services	2,000	0.52	0.36	146
Photo Processing	0	0.00	0.05	0
Photo Studio	0	0.00	0.07	0
Post Offices	2,200	0.58	0.49	117
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	1,700	0.45	0.48	94
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.66	0
Video Tape Rental	4,300	1.13	0.07	1,538
Totals	**35,700**	**9.35**	**7.39**	**126**



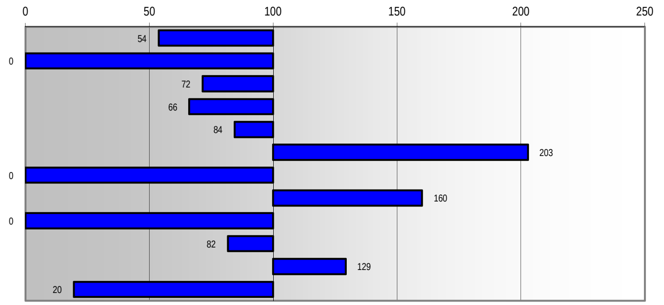
Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



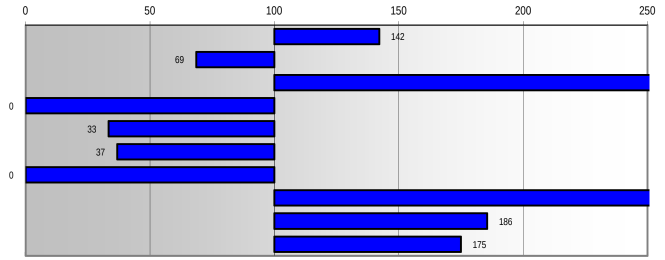
Floorspace Sq Ft

Centre: **Burgess Hill** **Survey Date:** **21/08/2013**

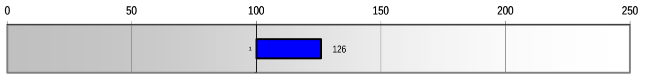
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	3,800	1.00	1.85	54
Bingo & Amusements	0	0.00	0.91	0
Cafes	5,900	1.55	2.16	72
Casinos & Betting Offices	2,800	0.73	1.11	66
Cinemas, Theatres & Concert Halls	5,500	1.44	1.71	84
Clubs	8,900	2.33	1.15	203
Disco, Dance & Nightclubs	0	0.00	0.52	0
Fast Food & Take Away	16,400	4.30	2.68	160
Hotels & Guest Houses	0	0.00	2.00	0
Public Houses	11,400	2.99	3.65	82
Restaurants	18,900	4.95	3.83	129
Sports & Leisure Facilities	1,200	0.31	1.61	20
Totals	**74,800**	**19.60**	**23.20**	**84**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	2,000	0.52	0.37	142
Building Supplies & Services	1,200	0.31	0.46	69
Business Goods & Services	300	0.08	0.01	597
Employment & Careers	0	0.00	0.27	0
Financial Services	1,000	0.26	0.78	33
Legal Services	1,100	0.29	0.78	37
Other Business Services	0	0.00	0.45	0
Printing & Copying	2,900	0.76	0.19	409
Property Services	12,800	3.35	1.81	186
Retail Banks	20,800	5.45	3.11	175
Totals	**42,100**	**11.03**	**8.24**	**134**



Vacant Outlets				
Vacant Retail & Service Outlets	**44,600**	**11.68**	**9.28**	**126**



Total Floorspace	**381,700**

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TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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Goad Category Report

East Grinstead

Survey Date: **15/05/2013**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area
When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report
This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report
Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner
Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans
These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans
Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to
http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts
We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database
An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail: goad.sales@uk.experian.com

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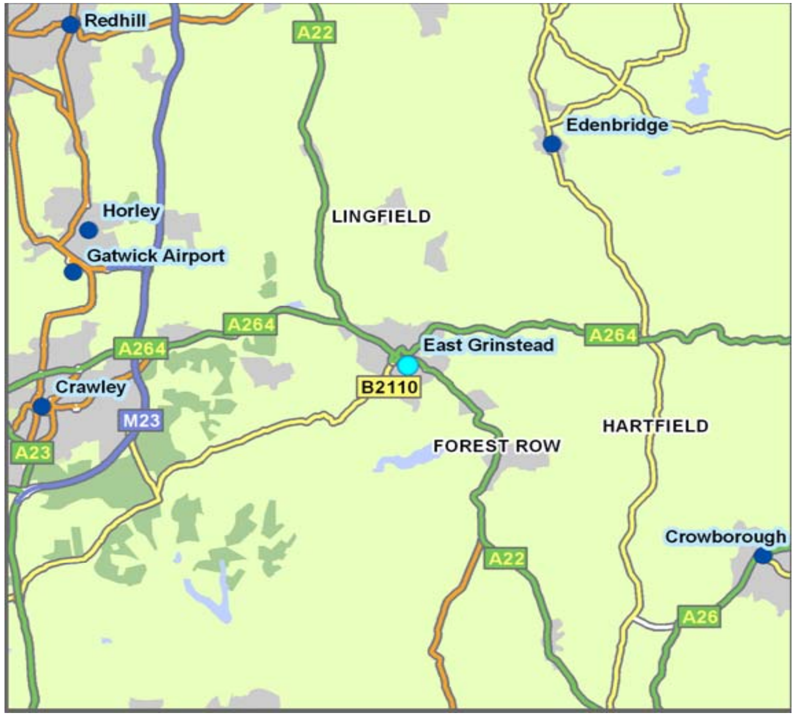


Nearest Location	Distance KM
Edenbridge	9.49
Gatwick Airport	11.89
Horley	11.94
Crawley	12.55
Crowborough	13.95

Major Retailers Present

Department Stores

BhS	0
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	0

Mixed Goods Retailers

Argos	1
Boots the Chemist	1
T K Maxx	0
W H Smith	1
Wilkinson	0

Supermarkets

Sainsburys	0
Tesco	0
Waitrose	1

Clothing

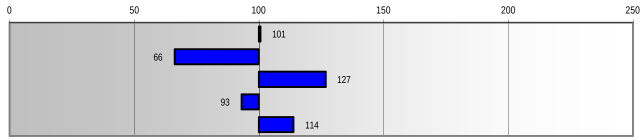
Burton	0
Dorothy Perkins	1
H & M	0
New Look	1
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

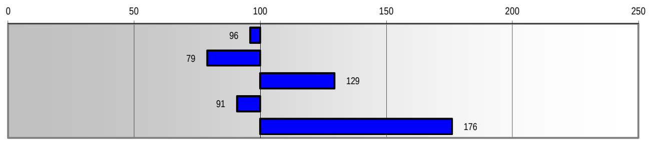
Carphone Warehouse	1
Clarks	1
Clintons	1
H M V	0
O2	1
Superdrug	1
Phones 4 U	1
Vodafone	1
Waterstones	1

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	35	43.21	42.92	101
Convenience	6	7.41	11.19	66
Retail Service	10	12.35	9.74	127
Leisure Services	15	18.52	19.89	93
Financial & Business Services	15	18.52	16.26	114
Total Multiple Outlets	**81**			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	101,100	45.95	47.85	96
Convenience	39,900	18.14	22.96	79
Retail Service	13,500	6.14	4.74	129
Leisure Services	31,100	14.14	15.56	91
Financial & Business Services	34,400	15.64	8.88	176
Total Multiple Floorspace	**220,000**			



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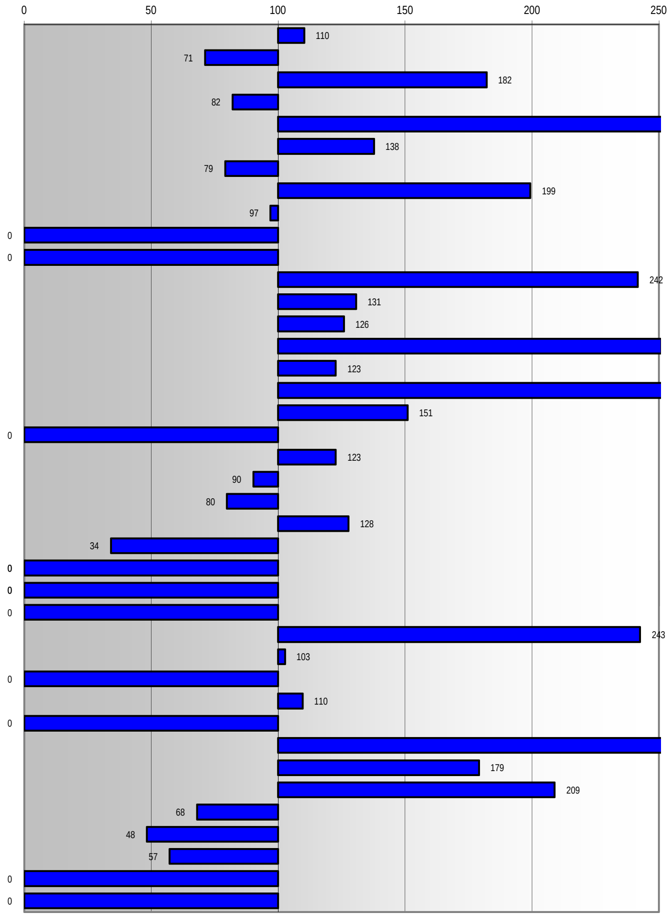
Base: All UK Centres

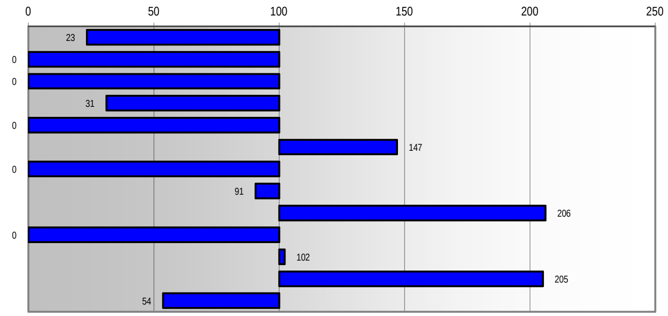
Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	1	0.45	0.41	110
	Art & Art Dealers	1	0.45	0.63	71
	Booksellers	2	0.90	0.49	182
	Carpets & Flooring	1	0.45	0.55	82
	Catalogue Showrooms	1	0.45	0.14	332
	Charity Shops	8	3.60	2.62	138
	Chemist & Drugstores	2	0.90	1.14	79
	Childrens & Infants Wear	2	0.90	0.45	199
	Clothing General	4	1.80	1.86	97
	Crafts, Gifts, China & Glass	0	0.00	1.60	0
	Cycles & Accessories	0	0.00	0.25	0
	Department & Variety Stores	2	0.90	0.37	242
	DIY & Home Improvement	2	0.90	0.69	131
	Electrical & Other Durable Goods	4	1.80	1.43	126
	Florists	4	1.80	0.72	251
	Footwear	3	1.35	1.10	123
	Furniture Fitted	3	1.35	0.38	353
	Furniture General	3	1.35	0.90	151
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	2	0.90	0.73	123
	Hardware & Household Goods	3	1.35	1.50	90
	Jewellery, Watches & Silver	3	1.35	1.69	80
	Ladies & Mens Wear & Acc.	4	1.80	1.41	128
	Ladies Wear & Accessories	2	0.90	2.64	34
	Leather & Travel Goods	0	0.00	0.17	0
	Mens Wear & Accessories	0	0.00	0.87	0
	Music & Musical Instruments	0	0.00	0.15	0
	Music & Video Recordings	1	0.45	0.19	243
	Newsagents & Stationers	3	1.35	1.32	103
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	2	0.90	0.82	110
	Photographic & Optical	0	0.00	0.13	0
	Secondhand Goods, Books, etc.	3	1.35	0.32	416
	Sports, Camping & Leisure Goods	3	1.35	0.75	179
	Telephones & Accessories	6	2.70	1.29	209
	Textiles & Soft Furnishings	1	0.45	0.66	68
	Toiletries, Cosmetics & Beauty Products	1	0.45	0.93	48
	Toys, Games & Hobbies	1	0.45	0.79	57
	Vehicle & Motorcycle Sales	0	0.00	0.27	0
	Vehicle Accessories	0	0.00	0.19	0
	Totals	**78**	**35.14**	**32.62**	**108**



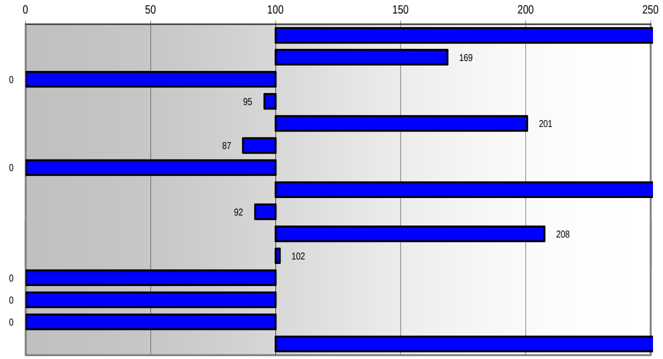
Outlet Counts

Centre: East Grinstead **Survey Date:** 15/05/2013

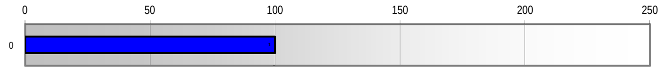
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	1	0.45	1.93	23
Butchers	0	0.00	0.67	0
CTN	0	0.00	0.26	0
Convenience Stores	1	0.45	1.45	31
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.45	0.31	147
Greengrocers	0	0.00	0.31	0
Grocers & Delicatessens	2	0.90	0.99	91
Health Foods	2	0.90	0.44	206
Markets	0	0.00	0.12	0
Off Licences	1	0.45	0.44	102
Shoe Repairs Etc	2	0.90	0.44	205
Supermarkets	1	0.45	0.84	54
Total Convenience	**11**	**4.95**	**8.33**	60



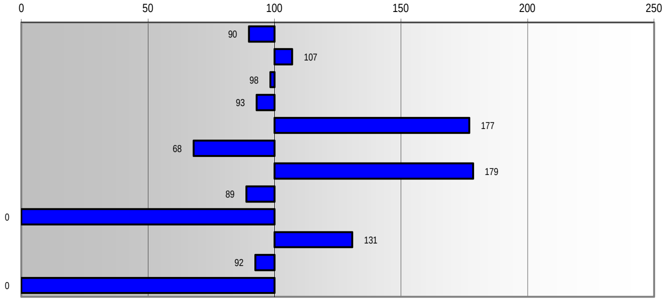
Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	1	0.45	0.08	536
Dry Cleaners & Launderettes	3	1.35	0.80	169
Filling Stations	0	0.00	0.22	0
Health & Beauty	18	8.11	8.49	95
Opticians	6	2.70	1.35	201
Other Retail Services	1	0.45	0.52	87
Photo Processing	0	0.00	0.14	0
Photo Studio	3	1.35	0.17	799
Post Offices	1	0.45	0.49	92
Repairs, Alterations & Restoration	1	0.45	0.22	208
Travel Agents	2	0.90	0.89	102
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	0	0.00	0.51	0
Video Tape Rental	1	0.45	0.09	495
Totals	**37**	**16.67**	**14.06**	**119**



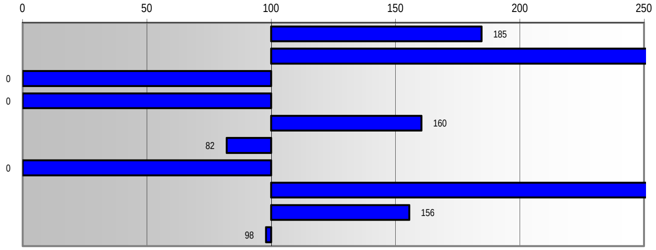
Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.15**	**0**



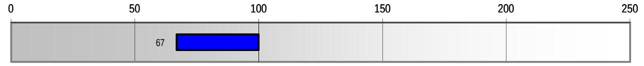
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	3	1.35	1.50	90
Bingo & Amusements	1	0.45	0.42	107
Cafes	9	4.05	4.12	98
Casinos & Betting Offices	3	1.35	1.45	93
Cinemas, Theatres & Concert Halls	1	0.45	0.25	177
Clubs	1	0.45	0.66	68
Disco, Dance & Nightclubs	1	0.45	0.25	179
Fast Food & Take Away	11	4.95	5.57	89
Hotels & Guest Houses	0	0.00	0.66	0
Public Houses	8	3.60	2.76	131
Restaurants	9	4.05	4.39	92
Sports & Leisure Facilities	0	0.00	0.28	0
Totals	**47**	**21.17**	**22.32**	**95**



Financial & Business Services				
Building Societies	2	0.90	0.49	185
Building Supplies & Services	3	1.35	0.51	265
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	0	0.00	0.42	0
Financial Services	5	2.25	1.40	160
Legal Services	2	0.90	1.10	82
Other Business Services	0	0.00	0.40	0
Printing & Copying	2	0.90	0.32	280
Property Services	12	5.41	3.47	156
Retail Banks	6	2.70	2.76	98
Totals	**32**	**14.41**	**10.90**	**132**



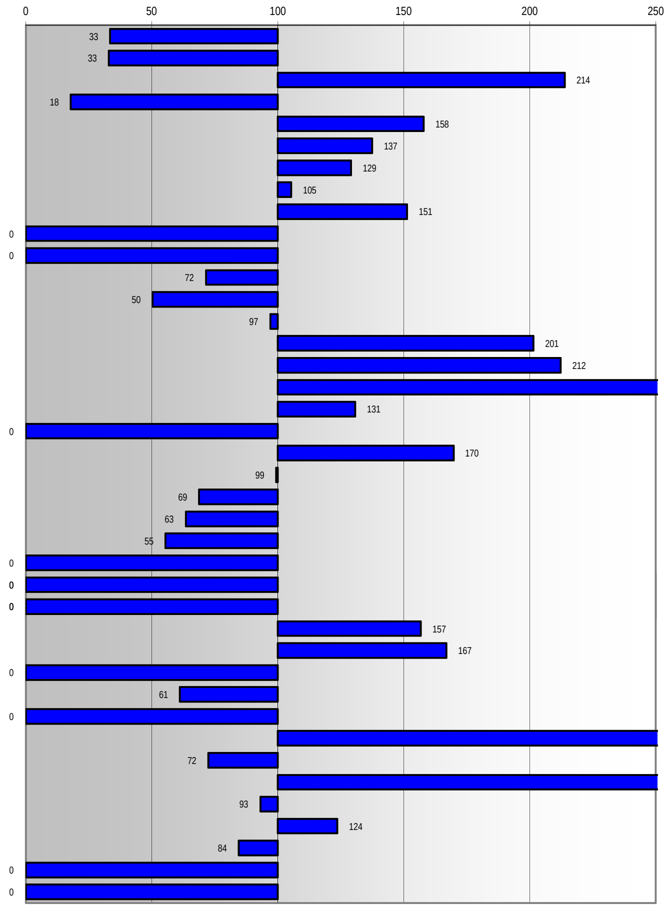
Vacant Outlets				
Vacant Retail & Service Outlets	**17**	**7.66**	**11.45**	**67**
Total Number of Outlets	**222**			



Floorspace Sq Ft

Centre: East Grinstead **Survey Date:** 15/05/2013

Sector	Classification	Floorspace	Area %	Base %	Index
Comparison		Floorspace	Area %	Base %	Index
	Antique Shops	300	0.07	0.22	33
	Art & Art Dealers	500	0.12	0.36	33
	Booksellers	3,700	0.89	0.42	214
	Carpets & Flooring	400	0.10	0.54	18
	Catalogue Showrooms	3,400	0.82	0.52	158
	Charity Shops	9,700	2.33	1.69	137
	Chemist & Drugstores	8,400	2.02	1.56	129
	Childrens & Infants Wear	1,600	0.38	0.36	105
	Clothing General	20,900	5.01	3.31	151
	Crafts, Gifts, China & Glass	0	0.00	0.81	0
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	13,600	3.26	4.56	72
	DIY & Home Improvement	2,400	0.58	1.14	50
	Electrical & Other Durable Goods	4,700	1.13	1.16	97
	Florists	2,200	0.53	0.26	201
	Footwear	8,100	1.94	0.92	212
	Furniture Fitted	5,200	1.25	0.35	354
	Furniture General	7,700	1.85	1.41	131
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	3,500	0.84	0.49	170
	Hardware & Household Goods	14,900	3.57	3.60	99
	Jewellery, Watches & Silver	2,100	0.50	0.73	69
	Ladies & Mens Wear & Acc.	4,700	1.13	1.78	63
	Ladies Wear & Accessories	5,600	1.34	2.43	55
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	0	0.00	0.71	0
	Music & Musical Instruments	0	0.00	0.10	0
	Music & Video Recordings	1,200	0.29	0.18	157
	Newsagents & Stationers	6,600	1.58	0.95	167
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	1,500	0.36	0.59	61
	Photographic & Optical	0	0.00	0.06	0
	Secondhand Goods, Books, etc.	2,100	0.50	0.16	323
	Sports, Camping & Leisure Goods	3,000	0.72	0.99	72
	Telephones & Accessories	8,800	2.11	0.68	311
	Textiles & Soft Furnishings	1,900	0.46	0.49	93
	Toiletries, Cosmetics & Beauty Products	4,500	1.08	0.87	124
	Toys, Games & Hobbies	2,300	0.55	0.65	84
	Vehicle & Motorcycle Sales	0	0.00	0.54	0
	Vehicle Accessories	0	0.00	0.22	0
	Totals	**155,500**	**37.31**	**36.25**	**103**



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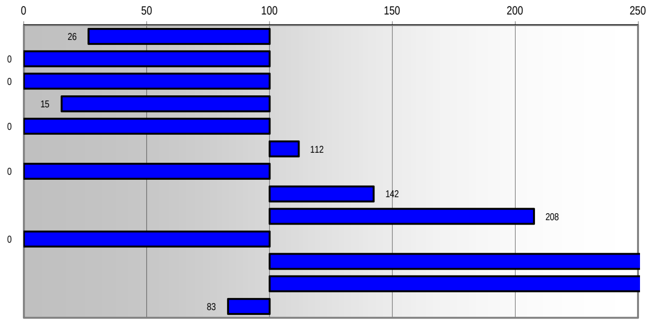
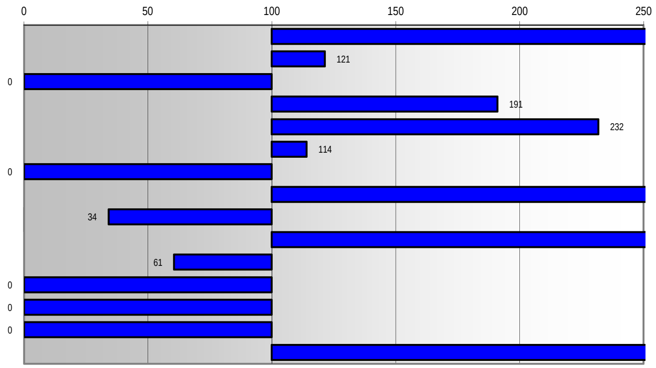
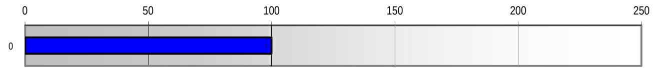
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	1,000	0.24	0.91	26
Butchers	0	0.00	0.34	0
CTN	0	0.00	0.12	0
Convenience Stores	1,000	0.24	1.56	15
Fishmongers	0	0.00	0.05	0
Frozen Foods	3,900	0.94	0.84	112
Greengrocers	0	0.00	0.15	0
Grocers & Delicatessens	3,200	0.77	0.54	142
Health Foods	2,200	0.53	0.25	208
Markets	0	0.00	0.91	0
Off Licences	2,800	0.67	0.25	267
Shoe Repairs Etc	2,400	0.58	0.12	483
Supermarkets	30,800	7.39	8.89	83
Total Convenience	**47,300**	**11.35**	**14.92**	**76**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	2,900	0.70	0.04	1,612
Dry Cleaners & Launderettes	1,700	0.41	0.34	121
Filling Stations	0	0.00	0.12	0
Health & Beauty	30,300	7.27	3.81	191
Opticians	7,500	1.80	0.78	232
Other Retail Services	1,700	0.41	0.36	114
Photo Processing	0	0.00	0.05	0
Photo Studio	2,300	0.55	0.07	757
Post Offices	700	0.17	0.49	34
Repairs, Alterations & Restoration	1,200	0.29	0.07	403
Travel Agents	1,200	0.29	0.48	61
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.66	0
Video Tape Rental	2,400	0.58	0.07	786
Totals	**51,900**	**12.45**	**7.39**	**168**



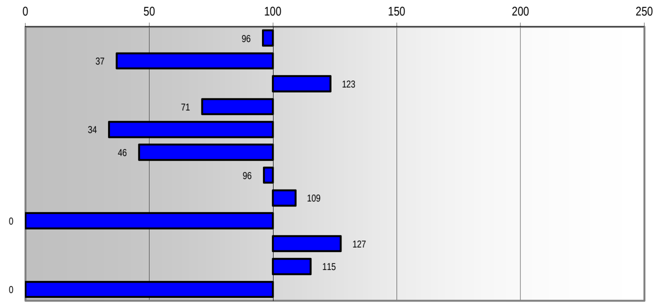
Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



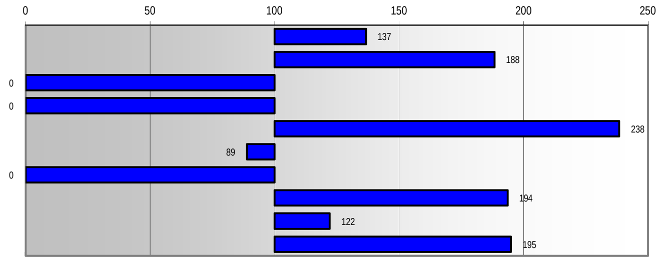
Floorspace Sq Ft

Centre: East Grinstead **Survey Date:** 15/05/2013

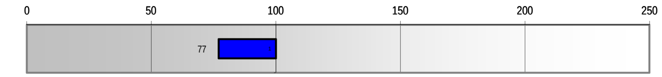
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	7,400	1.78	1.85	96
Bingo & Amusements	1,400	0.34	0.91	37
Cafes	11,100	2.66	2.16	123
Casinos & Betting Offices	3,300	0.79	1.11	71
Cinemas, Theatres & Concert Halls	2,400	0.58	1.71	34
Clubs	2,200	0.53	1.15	46
Disco, Dance & Nightclubs	2,100	0.50	0.52	96
Fast Food & Take Away	12,200	2.93	2.68	109
Hotels & Guest Houses	0	0.00	2.00	0
Public Houses	19,400	4.65	3.65	127
Restaurants	18,400	4.41	3.83	115
Sports & Leisure Facilities	0	0.00	1.61	0
Totals	**79,900**	**19.17**	**23.20**	**83**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	2,100	0.50	0.37	137
Building Supplies & Services	3,600	0.86	0.46	188
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.27	0
Financial Services	7,800	1.87	0.78	238
Legal Services	2,900	0.70	0.78	89
Other Business Services	0	0.00	0.45	0
Printing & Copying	1,500	0.36	0.19	194
Property Services	9,200	2.21	1.81	122
Retail Banks	25,300	6.07	3.11	195
Totals	**52,400**	**12.57**	**8.24**	**153**



Vacant Outlets				
Vacant Retail & Service Outlets	**29,800**	**7.15**	**9.28**	**77**
Total Floorspace	**416,800**			



TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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Goad Category Report

Haywards Heath

Survey Date: **08/01/2014**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area

When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System

A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report

This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report

Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner

Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans

These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans

Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts

We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database

An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

**For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail: goad.sales@uk.experian.com**

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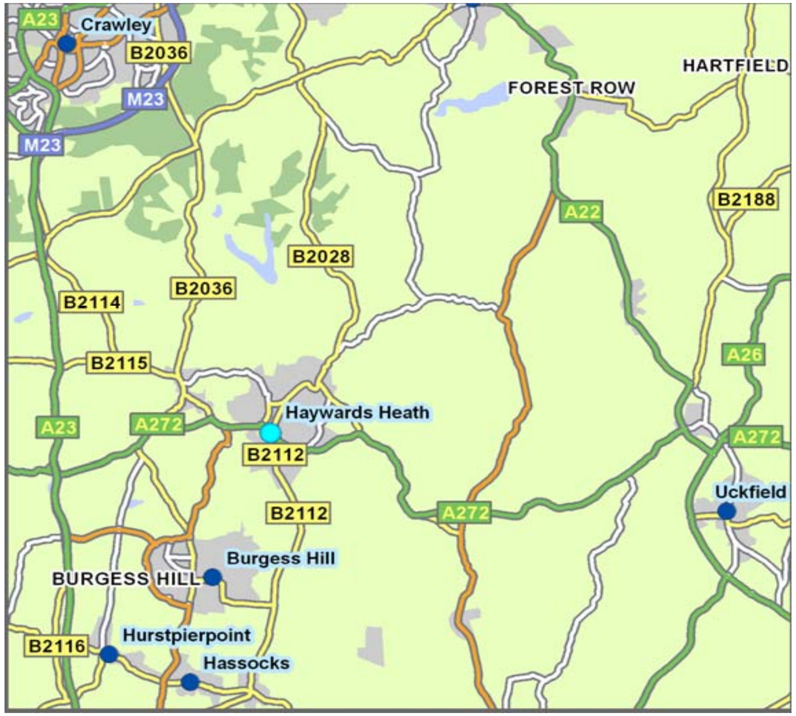


Nearest Location	Distance KM
Burgess Hill	5.07
Hassocks	8.58
Hurstpierpoint	8.82
Uckfield	14.25
Crawley	14.30

Major Retailers Present

Department Stores

BhS	0
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	1

Mixed Goods Retailers

Argos	0
Boots the Chemist	1
T K Maxx	0
W H Smith	1
Wilkinson	0

Supermarkets

Sainsburys	0
Tesco	1
Waitrose	0

Clothing

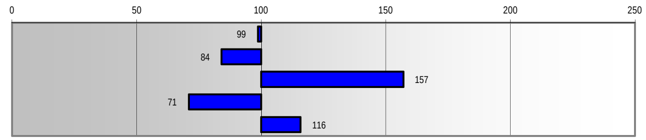
Burton	0
Dorothy Perkins	1
H & M	0
New Look	0
Next	1
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

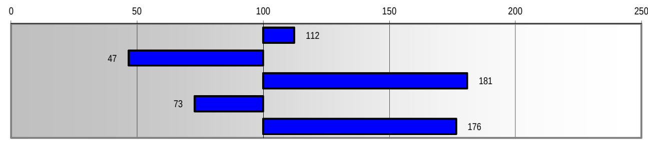
Carphone Warehouse	1
Clarks	1
Clintons	1
H M V	0
O2	0
Superdrug	1
Phones 4 U	1
Vodafone	1
Waterstones	1

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	36	42.35	42.92	99
Convenience	8	9.41	11.19	84
Retail Service	13	15.29	9.74	157
Leisure Services	12	14.12	19.89	71
Financial & Business Services	16	18.82	16.26	116
Total Multiple Outlets	**85**			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	113,400	53.72	47.85	112
Convenience	22,600	10.71	22.96	47
Retail Service	18,100	8.57	4.74	181
Leisure Services	23,900	11.32	15.56	73
Financial & Business Services	33,100	15.68	8.88	176
Total Multiple Floorspace	**211,100**			



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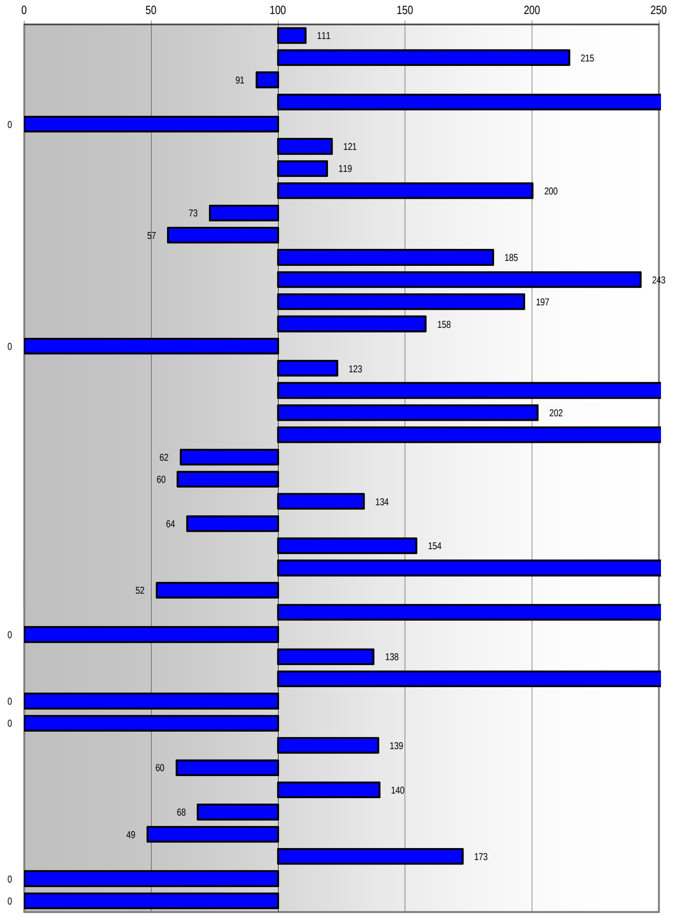
Outlet Counts

Centre: Haywards Heath **Survey Date:** 08/01/2014

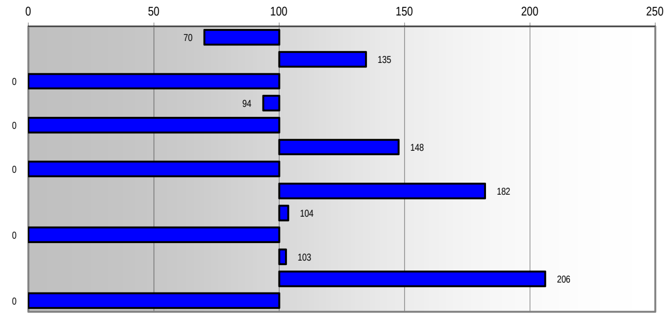
Base: All UK Centres

Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	1	0.45	0.41	111
	Art & Art Dealers	3	1.36	0.63	215
	Booksellers	1	0.45	0.49	91
	Carpets & Flooring	4	1.81	0.55	330
	Catalogue Showrooms	0	0.00	0.14	0
	Charity Shops	7	3.17	2.62	121
	Chemist & Drugstores	3	1.36	1.14	119
	Childrens & Infants Wear	2	0.90	0.45	200
	Clothing General	3	1.36	1.86	73
	Crafts, Gifts, China & Glass	2	0.90	1.60	57
	Cycles & Accessories	1	0.45	0.25	185
	Department & Variety Stores	2	0.90	0.37	243
	DIY & Home Improvement	3	1.36	0.69	197
	Electrical & Other Durable Goods	5	2.26	1.43	158
	Florists	0	0.00	0.72	0
	Footwear	3	1.36	1.10	123
	Furniture Fitted	5	2.26	0.38	591
	Furniture General	4	1.81	0.90	202
	Gardens & Equipment	1	0.45	0.05	873
	Greeting Cards	1	0.45	0.73	62
	Hardware & Household Goods	2	0.90	1.50	60
	Jewellery, Watches & Silver	5	2.26	1.69	134
	Ladies & Mens Wear & Acc.	2	0.90	1.41	64
	Ladies Wear & Accessories	9	4.07	2.64	154
	Leather & Travel Goods	1	0.45	0.17	268
	Mens Wear & Accessories	1	0.45	0.87	52
	Music & Musical Instruments	1	0.45	0.15	297
	Music & Video Recordings	0	0.00	0.19	0
	Newsagents & Stationers	4	1.81	1.32	138
	Office Supplies	2	0.90	0.03	3,078
	Other Comparison Goods	0	0.00	0.82	0
	Photographic & Optical	0	0.00	0.13	0
	Secondhand Goods, Books, etc.	1	0.45	0.32	139
	Sports, Camping & Leisure Goods	1	0.45	0.75	60
	Telephones & Accessories	4	1.81	1.29	140
	Textiles & Soft Furnishings	1	0.45	0.66	68
	Toiletries, Cosmetics & Beauty Products	1	0.45	0.93	49
	Toys, Games & Hobbies	3	1.36	0.79	173
	Vehicle & Motorcycle Sales	0	0.00	0.27	0
	Vehicle Accessories	0	0.00	0.19	0
	Totals	**89**	**40.27**	**32.62**	**123**

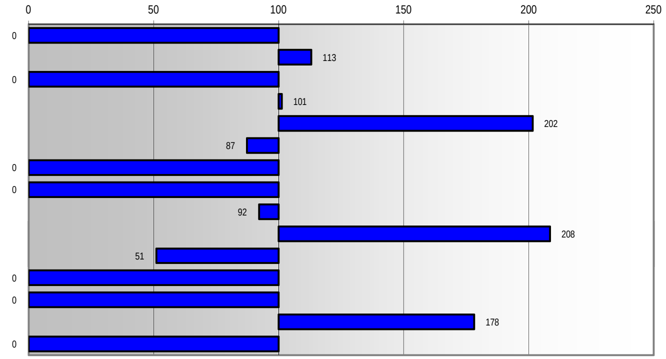


Outlet Counts   Centre: Haywards Heath   Survey Date: 08/01/2014

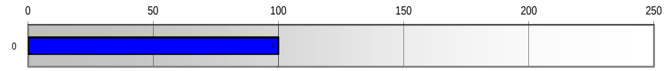
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	3	1.36	1.93	70
Butchers	2	0.90	0.67	135
CTN	0	0.00	0.26	0
Convenience Stores	3	1.36	1.45	94
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.45	0.31	148
Greengrocers	0	0.00	0.31	0
Grocers & Delicatessens	4	1.81	0.99	182
Health Foods	1	0.45	0.44	104
Markets	0	0.00	0.12	0
Off Licences	1	0.45	0.44	103
Shoe Repairs Etc	2	0.90	0.44	206
Supermarkets	0	0.00	0.84	0
Total Convenience	**17**	**7.69**	**8.33**	92



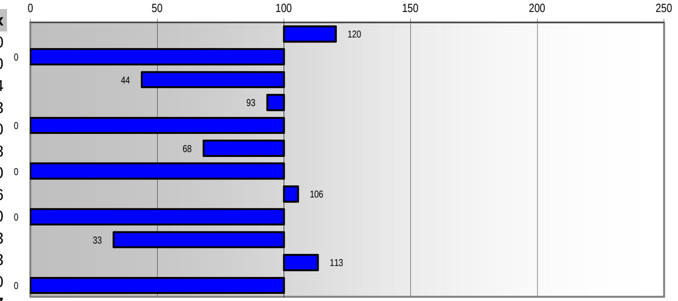
Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	2	0.90	0.80	113
Filling Stations	0	0.00	0.22	0
Health & Beauty	19	8.60	8.49	101
Opticians	6	2.71	1.35	202
Other Retail Services	1	0.45	0.52	87
Photo Processing	0	0.00	0.14	0
Photo Studio	0	0.00	0.17	0
Post Offices	1	0.45	0.49	92
Repairs, Alterations & Restoration	1	0.45	0.22	208
Travel Agents	1	0.45	0.89	51
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	2	0.90	0.51	178
Video Tape Rental	0	0.00	0.09	0
Totals	**33**	**14.93**	**14.06**	**106**



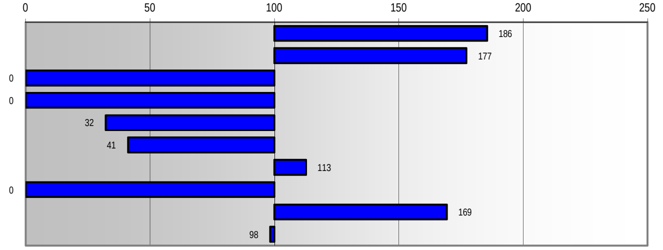
Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.15**	**0**



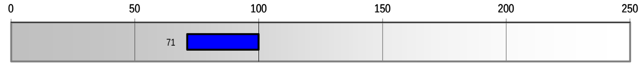
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	4	1.81	1.50	120
Bingo & Amusements	0	0.00	0.42	0
Cafes	4	1.81	4.12	44
Casinos & Betting Offices	3	1.36	1.45	93
Cinemas, Theatres & Concert Halls	0	0.00	0.25	0
Clubs	1	0.45	0.66	68
Disco, Dance & Nightclubs	0	0.00	0.25	0
Fast Food & Take Away	13	5.88	5.57	106
Hotels & Guest Houses	0	0.00	0.66	0
Public Houses	2	0.90	2.76	33
Restaurants	11	4.98	4.39	113
Sports & Leisure Facilities	0	0.00	0.28	0
Totals	**38**	**17.19**	**22.32**	**77**



Financial & Business Services				
Building Societies	2	0.90	0.49	186
Building Supplies & Services	2	0.90	0.51	177
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	0	0.00	0.42	0
Financial Services	1	0.45	1.40	32
Legal Services	1	0.45	1.10	41
Other Business Services	1	0.45	0.40	113
Printing & Copying	0	0.00	0.32	0
Property Services	13	5.88	3.47	169
Retail Banks	6	2.71	2.76	98
Totals	**26**	**11.76**	**10.90**	**108**



Vacant Outlets				
Vacant Retail & Service Outlets	**18**	**8.14**	**11.45**	**71**



Total Number of Outlets **221**

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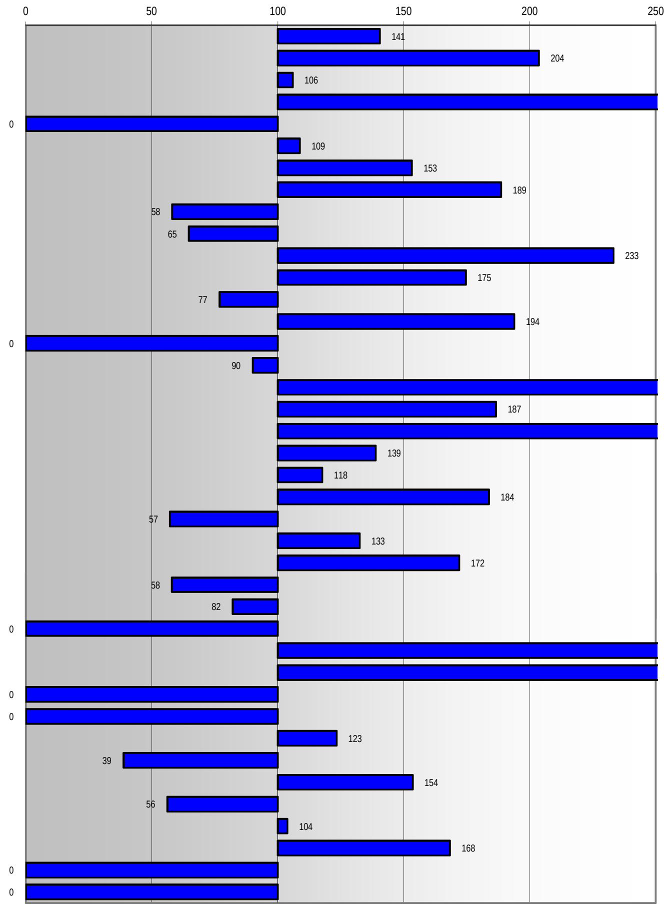
Floorspace Sq Ft

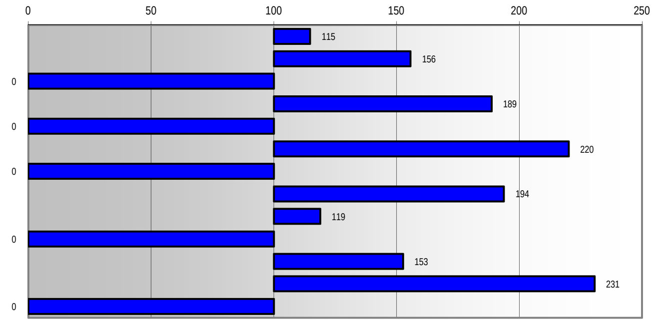
Centre: Haywards Heath **Survey Date:** 08/01/2014

Sector	Classification	Floorspace	Area %	Base %	Index
Comparison		Floorspace	Area %	Base %	Index
	Antique Shops	1,100	0.30	0.22	141
	Art & Art Dealers	2,700	0.74	0.36	204
	Booksellers	1,600	0.44	0.42	106
	Carpets & Flooring	10,000	2.75	0.54	511
	Catalogue Showrooms	0	0.00	0.52	0
	Charity Shops	6,700	1.84	1.69	109
	Chemist & Drugstores	8,700	2.39	1.56	153
	Childrens & Infants Wear	2,500	0.69	0.36	189
	Clothing General	7,000	1.92	3.31	58
	Crafts, Gifts, China & Glass	1,900	0.52	0.81	65
	Cycles & Accessories	1,600	0.44	0.19	233
	Department & Variety Stores	29,000	7.97	4.56	175
	DIY & Home Improvement	3,200	0.88	1.14	77
	Electrical & Other Durable Goods	8,200	2.25	1.16	194
	Florists	0	0.00	0.26	0
	Footwear	3,000	0.82	0.92	90
	Furniture Fitted	7,300	2.01	0.35	570
	Furniture General	9,600	2.64	1.41	187
	Gardens & Equipment	2,800	0.77	0.07	1,150
	Greeting Cards	2,500	0.69	0.49	139
	Hardware & Household Goods	15,400	4.23	3.60	118
	Jewellery, Watches & Silver	4,900	1.35	0.73	184
	Ladies & Mens Wear & Acc.	3,700	1.02	1.78	57
	Ladies Wear & Accessories	11,700	3.22	2.43	133
	Leather & Travel Goods	600	0.16	0.10	172
	Mens Wear & Accessories	1,500	0.41	0.71	58
	Music & Musical Instruments	300	0.08	0.10	82
	Music & Video Recordings	0	0.00	0.18	0
	Newsagents & Stationers	9,000	2.47	0.95	261
	Office Supplies	8,000	2.20	0.07	3,372
	Other Comparison Goods	0	0.00	0.59	0
	Photographic & Optical	0	0.00	0.06	0
	Secondhand Goods, Books, etc.	700	0.19	0.16	123
	Sports, Camping & Leisure Goods	1,400	0.38	0.99	39
	Telephones & Accessories	3,800	1.04	0.68	154
	Textiles & Soft Furnishings	1,000	0.27	0.49	56
	Toiletries, Cosmetics & Beauty Products	3,300	0.91	0.87	104
	Toys, Games & Hobbies	4,000	1.10	0.65	168
	Vehicle & Motorcycle Sales	0	0.00	0.54	0
	Vehicle Accessories	0	0.00	0.22	0
	Totals	**178,700**	**49.11**	**36.25**	**135**

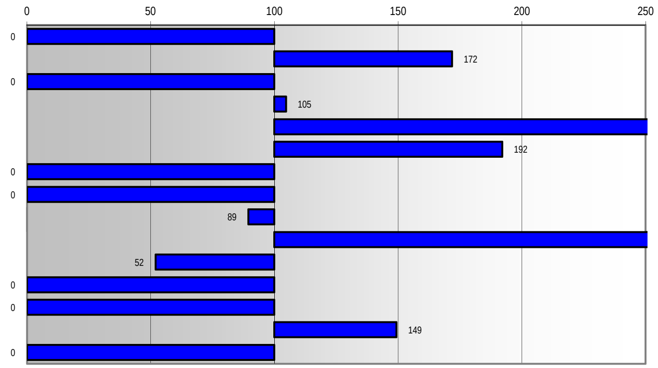


Floorspace Sq Ft   Centre: Haywards Heath   Survey Date: 08/01/2014

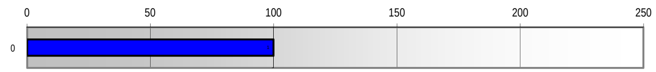
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	3,800	1.04	0.91	115
Butchers	1,900	0.52	0.34	156
CTN	0	0.00	0.12	0
Convenience Stores	10,700	2.94	1.56	189
Fishmongers	0	0.00	0.05	0
Frozen Foods	6,700	1.84	0.84	220
Greengrocers	0	0.00	0.15	0
Grocers & Delicatessens	3,800	1.04	0.54	194
Health Foods	1,100	0.30	0.25	119
Markets	0	0.00	0.91	0
Off Licences	1,400	0.38	0.25	153
Shoe Repairs Etc	1,000	0.27	0.12	231
Supermarkets	0	0.00	8.89	0
Total Convenience	**30,400**	**8.35**	**14.92**	**56**



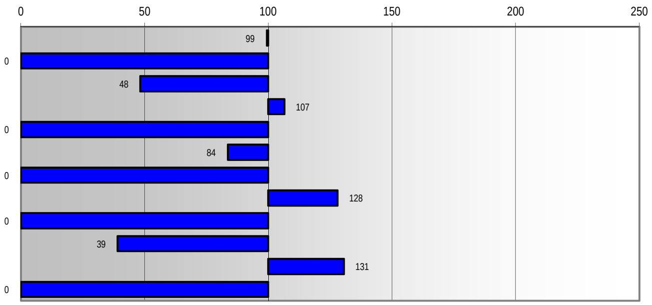
Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	2,100	0.58	0.34	172
Filling Stations	0	0.00	0.12	0
Health & Beauty	14,500	3.98	3.81	105
Opticians	7,300	2.01	0.78	258
Other Retail Services	2,500	0.69	0.36	192
Photo Processing	0	0.00	0.05	0
Photo Studio	0	0.00	0.07	0
Post Offices	1,600	0.44	0.49	89
Repairs, Alterations & Restoration	800	0.22	0.07	308
Travel Agents	900	0.25	0.48	52
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	3,600	0.99	0.66	149
Video Tape Rental	0	0.00	0.07	0
Totals	**33,300**	**9.15**	**7.39**	**124**



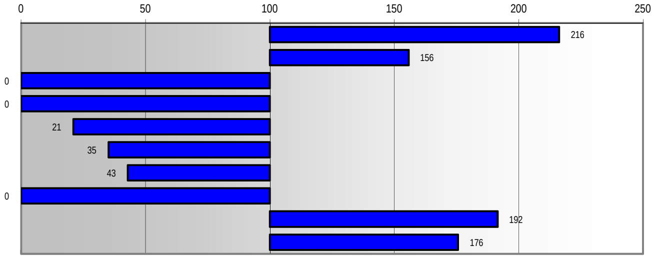
Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



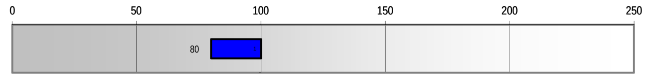
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	6,700	1.84	1.85	99
Bingo & Amusements	0	0.00	0.91	0
Cafes	3,800	1.04	2.16	48
Casinos & Betting Offices	4,300	1.18	1.11	107
Cinemas, Theatres & Concert Halls	0	0.00	1.71	0
Clubs	3,500	0.96	1.15	84
Disco, Dance & Nightclubs	0	0.00	0.52	0
Fast Food & Take Away	12,500	3.44	2.68	128
Hotels & Guest Houses	0	0.00	2.00	0
Public Houses	5,200	1.43	3.65	39
Restaurants	18,200	5.00	3.83	131
Sports & Leisure Facilities	0	0.00	1.61	0
Totals	**54,200**	**14.89**	**23.20**	**64**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	2,900	0.80	0.37	216
Building Supplies & Services	2,600	0.71	0.46	156
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.27	0
Financial Services	600	0.16	0.78	21
Legal Services	1,000	0.27	0.78	35
Other Business Services	700	0.19	0.45	43
Printing & Copying	0	0.00	0.19	0
Property Services	12,600	3.46	1.81	192
Retail Banks	19,900	5.47	3.11	176
Totals	**40,300**	**11.07**	**8.24**	**134**



Vacant Outlets				
Vacant Retail & Service Outlets	**27,000**	**7.42**	**9.28**	**80**
Total Floorspace	**363,900**			



TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Experian™
A world of insight

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MID SUSSEX DISTRICT COUNCIL

CONVENIENCE GOODS CAPACITY ASSESSMENT

strategicperspecti>es

TABLE 1A: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2014) POPULATION & PROJECTIONS (to 2031)

ZONE:	2014	2019	2024	2029	2031	% GROWTH: 2014-31
Zone 1:	34,673	36,071	37,557	38,687	39,103	12.8%
Zone 2:	32,012	33,219	34,500	35,490	35,834	11.9%
Zone 3:	6,872	7,173	7,495	7,748	7,844	14.1%
Zone 4:	27,133	28,795	30,301	31,444	31,845	17.4%
Zone 5:	38,408	40,624	42,669	44,196	44,745	16.5%
Zone 6:	47,817	49,673	51,713	53,283	53,846	12.6%
Zone 7:	17,811	18,552	19,313	19,897	20,097	12.8%
Zone 8:	9,206	9,629	10,051	10,373	10,481	13.8%
Zone 9:	16,747	17,414	18,126	18,669	18,868	12.7%
Zone 10:	33,575	34,513	35,288	36,234	36,633	9.1%
TOTAL:	**264,254**	**275,663**	**287,013**	**296,021**	**299,296**	**13.3%**

Source: The base year (2014) population and projections to 2031 have been sourced directly from Experian's latest *'Retail Area Planner'* Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 1B: MID SUSSEX DISTRICT COUNCIL - REVISED BASE YEAR (2014) POPULATION & PROJECTIONS (to 2031)

ZONE:	2014	2019	2024	2029	2031	% GROWTH: 2014-31
Zone 1:	34,673	34,923	35,392	35,917	36,127	4.2%
Zone 2:	32,012	34,512	38,510	42,883	44,632	39.4%
Zone 3:	6,872	7,035	7,198	7,361	7,427	8.1%
Zone 4:	27,133	28,092	29,050	30,009	30,393	12.0%
Zone 5:	38,408	39,408	40,850	42,401	43,022	12.0%
Zone 6:	47,817	48,067	48,897	49,873	50,263	5.1%
Zone 7:	17,811	18,061	18,429	18,827	18,986	6.6%
Zone 8:	9,206	9,440	9,673	9,907	10,000	8.6%
Zone 9:	16,747	16,872	17,246	17,682	17,857	6.6%
Zone 10:	33,575	34,075	35,069	36,186	36,633	9.1%
TOTAL:	**264,254**	**270,484**	**280,316**	**291,047**	**295,340**	**11.8%**

Source: The revised population projections for Mid Sussex District have been sourced from the local planning authority. These are taken from the ONS (Sub-National Population Projections – 2012 Base) released in May 2014 and have been adjusted by the local planning authority's demographers so that they are comparable with the plan period (i.e. April 2014-March 2031) and other datasets. Greater weight has been placed on the Council-derived population figures as the other evidence-based studies (e.g. SHMA) are using the same ONS published figures. SP has necessarily applied the year-on-year growth rates at the District level to the key zones that broadly make up the local authority area. In this case it is assumed that Zones 1-6 and Zone 9 are broadly equivalent to the Mid Sussex District area. SP has then allocated the forecast poulation growth to the different zones based on the planned and proposed housing allocations across the District and its main urban areas.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	% GROWTH: 2014-31
EXPERIAN - SPECIAL FORMS OF TRADING (%):		*2.6%*	*3.8%*	*4.8%*	*5.3%*	*5.6%*	
HOUSEHOLD SURVEY - REVISED SFT (%):		2.2%	3.2%	4.1%	4.5%	4.7%	
Zone 1:	£2,057	£2,012	£2,046	£2,089	£2,143	£2,163	7.5%
Zone 2:	£2,047	£2,002	£2,035	£2,078	£2,132	£2,152	7.5%
Zone 3:	£2,271	£2,221	£2,258	£2,306	£2,365	£2,387	7.5%
Zone 4:	£1,824	£1,784	£1,814	£1,852	£1,900	£1,918	7.5%
Zone 5:	£2,105	£2,059	£2,093	£2,138	£2,193	£2,213	7.5%
Zone 6:	£2,175	£2,127	£2,163	£2,209	£2,266	£2,287	7.5%
Zone 7:	£2,436	£2,382	£2,422	£2,474	£2,538	£2,561	7.5%
Zone 8:	£2,207	£2,158	£2,194	£2,241	£2,299	£2,320	7.5%
Zone 9:	£2,212	£2,163	£2,199	£2,246	£2,304	£2,326	7.5%
Zone 10:	£1,924	£1,881	£1,912	£1,953	£2,004	£2,022	7.5%

Source: Average spend per capita estimates for 2012 are derived from Experian *'Retail Area Planner' Reports* using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note.

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2014 - 2031 (£m)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	GROWTH: 2014-30 %	GROWTH: 2014-30 £m
Zone 1:	£71.3	£69.8	£71.4	£73.9	£77.0	£78.1	12.0%	£8.4
Zone 2:	£65.5	£64.1	£70.2	£80.0	£91.4	£96.0	49.9%	£32.0
Zone 3:	£15.6	£15.3	£15.9	£16.6	£17.4	£17.7	16.2%	£2.5
Zone 4:	£49.5	£48.4	£50.9	£53.8	£57.0	£58.3	20.4%	£9.9
Zone 5:	£80.9	£79.1	£82.5	£87.3	£93.0	£95.2	20.4%	£16.1
Zone 6:	£104.0	£101.7	£104.0	£108.0	£113.0	£114.9	13.0%	£13.2
Zone 7:	£43.4	£42.4	£43.7	£45.6	£47.8	£48.6	14.6%	£6.2
Zone 8:	£20.3	£19.9	£20.7	£21.7	£22.8	£23.2	16.8%	£3.3
Zone 9:	£37.0	£36.2	£37.1	£38.7	£40.7	£41.5	14.6%	£5.3
Zone 10:	£64.6	£63.2	£65.2	£68.5	£72.5	£74.1	17.3%	£10.9
TOTAL STUDY AREA	**£552.2**	**£540.0**	**£561.7**	**£594.2**	**£632.6**	**£647.8**	**20.0%**	**£107.8**

Source: Total available expenditure within each zone has been calculated by multiplying the revised base year population and projections sourced from Mid Sussex District Council (Table 1B) and the expenditure per capita levels (Table 2).

TABLE 4: ALL FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)
Excluding Special Forms of Trading

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
MID SUSSEX	Haywards Heath Town Centre	5.6%	0.3%	1.1%	0.1%	0.6%	0.0%	1.1%	0.0%	0.6%	0.0%	1.0%
	Haywards Heath TC: M&S, Orchards SC	6.4%	0.0%	4.0%	1.1%	0.4%	0.0%	4.5%	0.1%	0.8%	0.2%	1.5%
	HAYWARDS HEATH TOWN CENTRE:	**12.0%**	**0.3%**	**5.2%**	**1.3%**	**0.9%**	**0.0%**	**5.6%**	**0.1%**	**1.3%**	**0.2%**	**2.5%**
	Burgess Hill Town Centre	1.1%	18.4%	0.8%	0.5%	0.0%	0.0%	1.2%	6.1%	3.5%	0.2%	3.0%
	Burgess Hill TC: Waitrose, The Martlets	1.9%	16.7%	6.6%	0.8%	0.0%	0.0%	2.8%	10.0%	8.3%	1.2%	3.8%
	BURGESS HILL TOWN CENTRE:	**2.9%**	**35.1%**	**7.4%**	**1.3%**	**0.0%**	**0.0%**	**4.0%**	**16.1%**	**11.7%**	**1.4%**	**6.8%**
	East Grinstead Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.5%
	East Grinstead TC: Waitrose, West Street	0.0%	0.0%	0.0%	0.1%	1.8%	23.8%	2.9%	0.0%	0.0%	0.0%	5.0%
	EAST GRINSTEAD TOWN CENTRE:	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**1.8%**	**26.3%**	**2.9%**	**0.0%**	**0.0%**	**0.0%**	**5.5%**
	Hassocks	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	30.4%	4.8%	0.4%	1.6%
	Hurstpierpoint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.7%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	6.3%	0.3%	0.0%	0.0%	0.0%	0.0%	1.0%
	Cuckfield	0.0%	0.0%	3.7%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Lindfield	2.2%	0.0%	0.0%	0.4%	0.0%	0.2%	1.6%	0.0%	0.0%	0.0%	0.5%
	Haywards Heath: All Other Shops & Stores	8.6%	0.0%	10.8%	0.9%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	1.7%
	Burgess Hill: All Other Shops & Stores	0.3%	7.4%	0.9%	0.0%	0.0%	0.0%	1.7%	2.3%	1.2%	0.0%	1.2%
	East Grinstead: All Other Shops & Stores	0.0%	0.0%	0.0%	0.0%	1.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**11.1%**	**7.7%**	**15.5%**	**1.3%**	**8.1%**	**2.6%**	**5.9%**	**32.7%**	**16.6%**	**0.4%**	**7.4%**
	Tesco, Jane Murray Way, Burgess Hill	10.7%	48.8%	21.1%	0.7%	0.4%	0.0%	5.4%	37.9%	27.3%	2.4%	11.9%
	Sainsbury's, Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	6.7%	47.3%	1.9%	0.0%	0.0%	0.0%	10.2%
	Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	1.6%	17.2%	0.2%	0.0%	0.0%	0.0%	3.5%
	Sainsbury's, Bannister Way, Haywards Heath	61.6%	2.9%	43.0%	13.6%	0.0%	0.0%	24.2%	2.2%	2.1%	0.0%	12.5%
	Other Out-of-Centre Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	OUT-OF-CENTRE:	**72.3%**	**51.7%**	**64.1%**	**14.3%**	**8.6%**	**64.8%**	**31.7%**	**40.1%**	**29.4%**	**2.4%**	**38.1%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**98.4%**	**94.8%**	**92.2%**	**18.2%**	**19.5%**	**93.7%**	**50.1%**	**89.1%**	**59.0%**	**4.3%**	**60.2%**
OTHER CENTRES & STORES	Brighton	0.9%	2.4%	3.9%	0.0%	0.0%	0.0%	0.4%	2.1%	3.7%	70.0%	9.2%
	Crawley	0.0%	1.7%	0.6%	70.9%	66.8%	3.5%	0.7%	0.0%	0.0%	0.0%	17.1%
	Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.9%	0.0%	0.0%	0.0%	0.6%
	Hove	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	2.6%	16.3%	2.2%
	Horsham	0.0%	0.0%	1.3%	1.4%	0.0%	0.0%	0.0%	0.2%	3.9%	0.0%	0.4%
	Lewes	0.0%	0.6%	0.7%	0.0%	0.0%	0.0%	6.6%	3.8%	0.6%	0.2%	0.8%
	Uckfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.9%	0.0%	0.0%	0.0%	1.4%
	All Other Shops & Stores	0.7%	0.4%	1.4%	9.5%	13.8%	2.2%	18.5%	2.5%	30.1%	9.2%	8.0%
	ALL OUTSIDE STUDY AREA	1.6%	5.2%	7.8%	81.8%	80.5%	6.3%	49.9%	10.9%	41.0%	95.7%	39.8%
TOTAL MARKET SHARE		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Convenience market share analysis for main food and top-up shopping set out in Appendix 4 - including market shares (%/£m) for SFT.

TABLE 5: ALL FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
		£69.8	**£64.1**	**£15.3**	**£48.4**	**£79.1**	**£101.7**	**£42.4**	**£19.9**	**£36.2**	**£63.2**	**£540.0**
MID SUSSEX	Haywards Heath Town Centre	£3.9	£0.2	£0.2	£0.1	£0.4	£0.0	£0.5	£0.0	£0.2	£0.0	£5.2
	Haywards Heath TC: M&S, Orchards SC	£4.5	£0.0	£0.6	£0.6	£0.3	£0.0	£1.9	£0.0	£0.3	£0.1	£8.0
	HAYWARDS HEATH TOWN CENTRE:	**£8.4**	**£0.2**	**£0.8**	**£0.6**	**£0.7**	**£0.0**	**£2.4**	**£0.0**	**£0.5**	**£0.1**	**£13.3**
	Burgess Hill Town Centre	£0.7	£11.8	£0.1	£0.2	£0.0	£0.0	£0.5	£1.2	£1.3	£0.1	£16.2
	Burgess Hill TC: Waitrose, The Martlets	£1.3	£10.7	£1.0	£0.4	£0.0	£0.0	£1.2	£2.0	£3.0	£0.8	£20.4
	BURGESS HILL TOWN CENTRE:	**£2.0**	**£22.5**	**£1.1**	**£0.6**	**£0.0**	**£0.0**	**£1.7**	**£3.2**	**£4.2**	**£0.9**	**£36.6**
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£2.6
	East Grinstead TC: Waitrose, West Street	£0.0	£0.0	£0.0	£0.0	£1.4	£24.2	£1.2	£0.0	£0.0	£0.0	£27.2
	EAST GRINSTEAD TOWN CENTRE:	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£1.4**	**£26.8**	**£1.2**	**£0.0**	**£0.0**	**£0.0**	**£29.9**
	Hassocks	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£6.0	£1.7	£0.3	£8.4
	Hurstpierpoint	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£0.0	£3.8
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£5.0	£0.3	£0.0	£0.0	£0.0	£0.0	£5.3
	Cuckfield	£0.0	£0.0	£0.6	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
	Lindfield	£1.6	£0.0	£0.0	£0.2	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£2.6
	Haywards Heath: All Other Shops & Stores	£6.0	£0.0	£1.7	£0.4	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£9.0
	Burgess Hill: All Other Shops & Stores	£0.2	£4.7	£0.1	£0.0	£0.0	£0.0	£0.7	£0.5	£0.4	£0.0	£6.7
	East Grinstead: All Other Shops & Stores	£0.0	£0.0	£0.0	£0.0	£1.2	£2.0	£0.0	£0.0	£0.0	£0.0	£3.2
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**£7.8**	**£4.9**	**£2.4**	**£0.6**	**£6.4**	**£2.6**	**£2.5**	**£6.5**	**£6.0**	**£0.3**	**£39.8**
	Tesco, Jane Murray Way, Burgess Hill	£7.5	£31.3	£3.2	£0.3	£0.3	£0.0	£2.3	£7.5	£9.9	£1.5	£64.0
	Sainsbury's, Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£5.3	£48.1	£0.8	£0.0	£0.0	£0.0	£55.0
	Aldi, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£1.2	£17.5	£0.1	£0.0	£0.0	£0.0	£19.1
	Sainsbury's, Bannister Way, Haywards Heath	£43.0	£1.9	£6.6	£6.6	£0.0	£0.0	£10.3	£0.4	£0.7	£0.0	£67.5
	Other Out-of-Centre Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2
	OUT-OF-CENTRE:	**£50.5**	**£33.1**	**£9.8**	**£6.9**	**£6.8**	**£65.9**	**£13.5**	**£8.0**	**£10.6**	**£1.5**	**£205.8**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£68.6**	**£60.7**	**£14.1**	**£8.8**	**£15.4**	**£95.3**	**£21.3**	**£17.7**	**£21.4**	**£2.7**	**£325.3**
OTHER CENTRES & STORES	Brighton	£0.6	£1.6	£0.6	£0.0	£0.0	£0.0	£0.2	£0.4	£1.3	£44.2	£49.7
	Crawley	£0.0	£1.1	£0.1	£34.3	£52.8	£3.5	£0.3	£0.0	£0.0	£0.0	£92.6
	Crowborough	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£2.5	£0.0	£0.0	£0.0	£3.1
	Hove	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.0	£10.3	£11.9
	Horsham	£0.0	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£2.4
	Lewes	£0.0	£0.4	£0.1	£0.0	£0.0	£0.0	£2.8	£0.7	£0.2	£0.1	£4.3
	Uckfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.6	£0.0	£0.0	£0.0	£7.4
	All Other Shops & Stores	£0.5	£0.3	£0.2	£4.6	£10.9	£2.3	£7.8	£0.5	£10.9	£5.8	£43.4
	ALL OUTSIDE STUDY AREA	**£1.1**	**£3.4**	**£1.2**	**£39.6**	**£63.7**	**£6.5**	**£21.2**	**£2.2**	**£14.8**	**£60.4**	**£214.7**
TOTAL MARKET SHARE		**£69.8**	**£64.1**	**£15.3**	**£48.4**	**£79.1**	**£101.7**	**£42.4**	**£19.9**	**£36.2**	**£63.2**	**£540.0**

Source: Table 3 and Table 4

TABLE 6: ALL FOOD SHOPPING - 2019 MARKET SHARE ANALYSIS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
		£71.4	£70.2	£15.9	£50.9	£82.5	£104.0	£43.7	£20.7	£37.1	£65.2	£561.7
MID SUSSEX	Haywards Heath Town Centre	£4.0	£0.2	£0.2	£0.1	£0.5	£0.0	£0.5	£0.0	£0.2	£0.0	£5.4
	Haywards Heath TC: M&S, Orchards SC	£4.6	£0.0	£0.6	£0.6	£0.3	£0.0	£2.0	£0.0	£0.3	£0.1	£8.3
	HAYWARDS HEATH TOWN CENTRE:	**£8.6**	**£0.2**	**£0.8**	**£0.6**	**£0.8**	**£0.0**	**£2.4**	**£0.0**	**£0.5**	**£0.1**	**£13.8**
	Burgess Hill Town Centre	£0.8	£12.9	£0.1	£0.3	£0.0	£0.0	£0.5	£1.3	£1.3	£0.1	£16.8
	Burgess Hill TC: Waitrose, The Martlets	£1.3	£11.7	£1.0	£0.4	£0.0	£0.0	£1.2	£2.1	£3.1	£0.8	£21.2
	BURGESS HILL TOWN CENTRE:	**£2.1**	**£24.6**	**£1.2**	**£0.7**	**£0.0**	**£0.0**	**£1.8**	**£3.3**	**£4.4**	**£0.9**	**£38.0**
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£2.7
	East Grinstead TC: Waitrose, West Street	£0.0	£0.0	£0.0	£0.0	£1.5	£24.7	£1.3	£0.0	£0.0	£0.0	£28.3
	EAST GRINSTEAD TOWN CENTRE:	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£1.5**	**£27.4**	**£1.3**	**£0.0**	**£0.0**	**£0.0**	**£31.1**
	Hassocks	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£6.3	£1.8	£0.3	£8.7
	Hurstpierpoint	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.0	£0.0	£3.9
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£5.2	£0.3	£0.0	£0.0	£0.0	£0.0	£5.5
	Cuckfield	£0.0	£0.0	£0.6	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
	Lindfield	£1.6	£0.0	£0.0	£0.2	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£2.7
	Haywards Heath: All Other Shops & Stores	£6.2	£0.0	£1.7	£0.5	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£9.4
	Burgess Hill: All Other Shops & Stores	£0.2	£5.2	£0.2	£0.0	£0.0	£0.0	£0.7	£0.5	£0.4	£0.0	£7.0
	East Grinstead: All Other Shops & Stores	£0.0	£0.0	£0.0	£0.0	£1.2	£2.1	£0.0	£0.0	£0.0	£0.0	£3.4
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**£7.9**	**£5.4**	**£2.5**	**£0.7**	**£6.7**	**£2.7**	**£2.6**	**£6.8**	**£6.2**	**£0.3**	**£41.4**
	Tesco, Jane Murray Way, Burgess Hill	£7.6	£34.3	£3.4	£0.3	£0.3	£0.0	£2.4	£7.9	£10.1	£1.5	£66.6
	Sainsbury's, Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£5.5	£49.2	£0.8	£0.0	£0.0	£0.0	£57.2
	Aldi, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£1.3	£17.9	£0.1	£0.0	£0.0	£0.0	£19.9
	Sainsbury's, Bannister Way, Haywards Heath	£44.0	£2.1	£6.8	£6.9	£0.0	£0.0	£10.6	£0.5	£0.8	£0.0	£70.3
	Other Out-of-Centre Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2
	OUT-OF-CENTRE:	**£51.7**	**£36.3**	**£10.2**	**£7.3**	**£7.1**	**£67.3**	**£13.9**	**£8.3**	**£10.9**	**£1.5**	**£214.1**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£70.3**	**£66.5**	**£14.6**	**£9.3**	**£16.1**	**£97.4**	**£21.9**	**£18.5**	**£21.9**	**£2.8**	**£338.4**
OTHER CENTRES & STORES	Brighton	£0.7	£1.7	£0.6	£0.0	£0.0	£0.0	£0.2	£0.4	£1.4	£45.6	£51.7
	Crawley	£0.0	£1.2	£0.1	£36.1	£55.1	£3.6	£0.3	£0.0	£0.0	£0.0	£96.3
	Crowborough	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£2.6	£0.0	£0.0	£0.0	£3.2
	Hove	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.0	£10.6	£12.3
	Horsham	£0.0	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.1	£1.5	£0.0	£2.4
	Lewes	£0.0	£0.5	£0.1	£0.0	£0.0	£0.0	£2.9	£0.8	£0.2	£0.1	£4.5
	Uckfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.8	£0.0	£0.0	£0.0	£7.7
	All Other Shops & Stores	£0.5	£0.3	£0.2	£4.8	£11.4	£2.3	£8.1	£0.5	£11.2	£6.0	£45.1
	ALL OUTSIDE STUDY AREA	**£1.2**	**£3.7**	**£1.2**	**£41.7**	**£66.4**	**£6.6**	**£21.8**	**£2.3**	**£15.2**	**£62.3**	**£223.3**
TOTAL MARKET SHARE		**£71.4**	**£70.2**	**£15.9**	**£50.9**	**£82.5**	**£104.0**	**£43.7**	**£20.7**	**£37.1**	**£65.2**	**£561.7**

Source: Table 3 and Table 4

TABLE 7: ALL FOOD SHOPPING - 2024 MARKET SHARE ANALYSIS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
		£73.9	£80.0	£16.6	£53.8	£87.3	£108.0	£45.6	£21.7	£38.7	£68.5	£594.2
MID SUSSEX	Haywards Heath Town Centre	£4.2	£0.2	£0.2	£0.1	£0.5	£0.0	£0.5	£0.0	£0.2	£0.0	£5.8
	Haywards Heath TC: M&S, Orchards SC	£4.7	£0.0	£0.7	£0.6	£0.3	£0.0	£2.0	£0.0	£0.3	£0.1	£8.8
	HAYWARDS HEATH TOWN CENTRE:	**£8.9**	**£0.2**	**£0.9**	**£0.7**	**£0.8**	**£0.0**	**£2.5**	**£0.0**	**£0.5**	**£0.1**	**£14.6**
	Burgess Hill Town Centre	£0.8	£14.7	£0.1	£0.3	£0.0	£0.0	£0.6	£1.3	£1.3	£0.1	£17.8
	Burgess Hill TC: Waitrose, The Martlets	£1.4	£13.3	£1.1	£0.4	£0.0	£0.0	£1.3	£2.2	£3.2	£0.8	£22.4
	BURGESS HILL TOWN CENTRE:	**£2.2**	**£28.1**	**£1.2**	**£0.7**	**£0.0**	**£0.0**	**£1.8**	**£3.5**	**£4.5**	**£0.9**	**£40.2**
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£2.9
	East Grinstead TC: Waitrose, West Street	£0.0	£0.0	£0.0	£0.0	£1.6	£25.7	£1.3	£0.0	£0.0	£0.0	£30.0
	EAST GRINSTEAD TOWN CENTRE:	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£1.6**	**£28.4**	**£1.3**	**£0.0**	**£0.0**	**£0.0**	**£32.9**
	Hassocks	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£6.6	£1.9	£0.3	£9.2
	Hurstpierpoint	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.1	£0.0	£4.1
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£5.5	£0.4	£0.0	£0.0	£0.0	£0.0	£5.8
	Cuckfield	£0.0	£0.0	£0.6	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Lindfield	£1.7	£0.0	£0.0	£0.2	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£2.8
	Haywards Heath: All Other Shops & Stores	£6.4	£0.0	£1.8	£0.5	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£9.9
	Burgess Hill: All Other Shops & Stores	£0.2	£5.9	£0.2	£0.0	£0.0	£0.0	£0.8	£0.5	£0.4	£0.0	£7.4
	East Grinstead: All Other Shops & Stores	£0.0	£0.0	£0.0	£0.0	£1.3	£2.2	£0.0	£0.0	£0.0	£0.0	£3.6
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**£8.2**	**£6.2**	**£2.6**	**£0.7**	**£7.1**	**£2.8**	**£2.7**	**£7.1**	**£6.4**	**£0.3**	**£43.8**
	Tesco, Jane Murray Way, Burgess Hill	£7.9	£39.0	£3.5	£0.4	£0.3	£0.0	£2.5	£8.2	£10.6	£1.6	£70.4
	Sainsbury's, Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£5.8	£51.1	£0.9	£0.0	£0.0	£0.0	£60.5
	Aldi, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£1.4	£18.6	£0.1	£0.0	£0.0	£0.0	£21.0
	Sainsbury's, Bannister Way, Haywards Heath	£45.6	£2.3	£7.1	£7.3	£0.0	£0.0	£11.0	£0.5	£0.8	£0.0	£74.3
	Other Out-of-Centre Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3
	OUT-OF-CENTRE:	**£53.5**	**£41.4**	**£10.6**	**£7.7**	**£7.5**	**£69.9**	**£14.5**	**£8.7**	**£11.4**	**£1.6**	**£226.5**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£72.7**	**£75.8**	**£15.3**	**£9.8**	**£17.0**	**£101.1**	**£22.9**	**£19.3**	**£22.9**	**£3.0**	**£358.0**
OTHER CENTRES & STORES	Brighton	£0.7	£2.0	£0.6	£0.0	£0.0	£0.0	£0.2	£0.5	£1.4	£47.9	£54.7
	Crawley	£0.0	£1.4	£0.1	£38.1	£58.3	£3.8	£0.3	£0.0	£0.0	£0.0	£101.9
	Crowborough	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£2.7	£0.0	£0.0	£0.0	£3.4
	Hove	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.0	£11.2	£13.0
	Horsham	£0.0	£0.0	£0.2	£0.8	£0.0	£0.0	£0.0	£0.1	£1.5	£0.0	£2.6
	Lewes	£0.0	£0.5	£0.1	£0.0	£0.0	£0.0	£3.0	£0.8	£0.2	£0.2	£4.8
	Uckfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.1	£0.0	£0.0	£0.0	£8.1
	All Other Shops & Stores	£0.5	£0.3	£0.2	£5.1	£12.0	£2.4	£8.4	£0.5	£11.7	£6.3	£47.7
	ALL OUTSIDE STUDY AREA	**£1.2**	**£4.2**	**£1.3**	**£44.0**	**£70.3**	**£6.9**	**£22.7**	**£2.4**	**£15.9**	**£65.5**	**£236.2**
TOTAL MARKET SHARE		**£73.9**	**£80.0**	**£16.6**	**£53.8**	**£87.3**	**£108.0**	**£45.6**	**£21.7**	**£38.7**	**£68.5**	**£594.2**

Source: Table 3 and Table 4

TABLE 8: ALL FOOD SHOPPING - 2029 MARKET SHARE ANALYSIS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
		£77.0	£91.4	£17.4	£57.0	£93.0	£113.0	£47.8	£22.8	£40.7	£72.5	£632.6
MID SUSSEX	Haywards Heath Town Centre	£4.3	£0.2	£0.2	£0.1	£0.5	£0.0	£0.5	£0.0	£0.2	£0.0	£6.1
	Haywards Heath TC: M&S, Orchards SC	£4.9	£0.0	£0.7	£0.7	£0.3	£0.0	£2.1	£0.0	£0.3	£0.2	£9.4
	HAYWARDS HEATH TOWN CENTRE:	**£9.2**	**£0.2**	**£0.9**	**£0.7**	**£0.9**	**£0.0**	**£2.7**	**£0.0**	**£0.5**	**£0.2**	**£15.5**
	Burgess Hill Town Centre	£0.8	£16.8	£0.1	£0.3	£0.0	£0.0	£0.6	£1.4	£1.4	£0.1	£18.9
	Burgess Hill TC: Waitrose, The Martlets	£1.4	£15.2	£1.2	£0.5	£0.0	£0.0	£1.3	£2.3	£3.4	£0.9	£23.9
	BURGESS HILL TOWN CENTRE:	**£2.3**	**£32.0**	**£1.3**	**£0.7**	**£0.0**	**£0.0**	**£1.9**	**£3.7**	**£4.8**	**£1.0**	**£42.8**
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£3.1
	East Grinstead TC: Waitrose, West Street	£0.0	£0.0	£0.0	£0.0	£1.7	£26.9	£1.4	£0.0	£0.0	£0.0	£31.9
	EAST GRINSTEAD TOWN CENTRE:	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£1.7**	**£29.7**	**£1.4**	**£0.0**	**£0.0**	**£0.0**	**£35.0**
	Hassocks	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£6.9	£2.0	£0.3	£9.8
	Hurstpierpoint	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£0.0	£4.4
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£5.8	£0.4	£0.0	£0.0	£0.0	£0.0	£6.2
	Cuckfield	£0.0	£0.0	£0.6	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Lindfield	£1.7	£0.0	£0.0	£0.2	£0.0	£0.3	£0.8	£0.0	£0.0	£0.0	£3.0
	Haywards Heath: All Other Shops & Stores	£6.6	£0.0	£1.9	£0.5	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£10.5
	Burgess Hill: All Other Shops & Stores	£0.2	£6.7	£0.2	£0.0	£0.0	£0.0	£0.8	£0.5	£0.5	£0.0	£7.8
	East Grinstead: All Other Shops & Stores	£0.0	£0.0	£0.0	£0.0	£1.4	£2.3	£0.0	£0.0	£0.0	£0.0	£3.8
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**£8.6**	**£7.1**	**£2.7**	**£0.7**	**£7.6**	**£2.9**	**£2.8**	**£7.5**	**£6.8**	**£0.3**	**£46.6**
	Tesco, Jane Murray Way, Burgess Hill	£8.2	£44.6	£3.7	£0.4	£0.4	£0.0	£2.6	£8.6	£11.1	£1.7	£75.0
	Sainsbury's, Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£6.2	£53.5	£0.9	£0.0	£0.0	£0.0	£64.4
	Aldi, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£1.5	£19.5	£0.1	£0.0	£0.0	£0.0	£22.4
	Sainsbury's, Bannister Way, Haywards Heath	£47.4	£2.7	£7.5	£7.7	£0.0	£0.0	£11.6	£0.5	£0.8	£0.0	£79.1
	Other Out-of-Centre Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.3
	OUT-OF-CENTRE:	**£55.7**	**£47.3**	**£11.2**	**£8.1**	**£8.0**	**£73.2**	**£15.2**	**£9.1**	**£12.0**	**£1.7**	**£241.2**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£75.7**	**£86.6**	**£16.0**	**£10.4**	**£18.1**	**£105.8**	**£23.9**	**£20.3**	**£24.1**	**£3.1**	**£381.1**
OTHER CENTRES & STORES	Brighton	£0.7	£2.2	£0.7	£0.0	£0.0	£0.0	£0.2	£0.5	£1.5	£50.7	£58.2
	Crawley	£0.0	£1.6	£0.1	£40.4	£62.1	£3.9	£0.3	£0.0	£0.0	£0.0	£108.5
	Crowborough	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£2.8	£0.0	£0.0	£0.0	£3.6
	Hove	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.1	£11.8	£13.9
	Horsham	£0.0	£0.0	£0.2	£0.8	£0.0	£0.0	£0.0	£0.1	£1.6	£0.0	£2.8
	Lewes	£0.0	£0.6	£0.1	£0.0	£0.0	£0.0	£3.1	£0.9	£0.2	£0.2	£5.1
	Uckfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.5	£0.0	£0.0	£0.0	£8.6
	All Other Shops & Stores	£0.5	£0.4	£0.2	£5.4	£12.8	£2.5	£8.8	£0.6	£12.3	£6.6	£50.8
	ALL OUTSIDE STUDY AREA	**£1.3**	**£4.8**	**£1.4**	**£46.6**	**£74.9**	**£7.2**	**£23.8**	**£2.5**	**£16.7**	**£69.4**	**£251.5**
TOTAL MARKET SHARE		**£77.0**	**£91.4**	**£17.4**	**£57.0**	**£93.0**	**£113.0**	**£47.8**	**£22.8**	**£40.7**	**£72.5**	**£632.6**

Source: Table 3 and Table 4

TABLE 9: ALL FOOD SHOPPING - 2031 MARKET SHARE ANALYSIS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
		£78.1	£96.0	£17.7	£58.3	£95.2	£114.9	£48.6	£23.2	£41.5	£74.1	£647.8
MID SUSSEX	Haywards Heath Town Centre	£4.4	£0.3	£0.2	£0.1	£0.5	£0.0	£0.5	£0.0	£0.2	£0.0	£6.3
	Haywards Heath TC: M&S, Orchards SC	£5.0	£0.0	£0.7	£0.7	£0.4	£0.0	£2.2	£0.0	£0.3	£0.2	£9.6
	HAYWARDS HEATH TOWN CENTRE:	**£9.4**	**£0.3**	**£0.9**	**£0.7**	**£0.9**	**£0.0**	**£2.7**	**£0.0**	**£0.6**	**£0.2**	**£15.9**
	Burgess Hill Town Centre	£0.8	£17.7	£0.1	£0.3	£0.0	£0.0	£0.6	£1.4	£1.4	£0.1	£19.4
	Burgess Hill TC: Waitrose, The Martlets	£1.4	£16.0	£1.2	£0.5	£0.0	£0.0	£1.3	£2.3	£3.4	£0.9	£24.5
	BURGESS HILL TOWN CENTRE:	**£2.3**	**£33.7**	**£1.3**	**£0.8**	**£0.0**	**£0.0**	**£2.0**	**£3.7**	**£4.9**	**£1.0**	**£43.9**
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£3.1
	East Grinstead TC: Waitrose, West Street	£0.0	£0.0	£0.0	£0.1	£1.7	£27.4	£1.4	£0.0	£0.0	£0.0	£32.7
	EAST GRINSTEAD TOWN CENTRE:	**£0.0**	**£0.0**	**£0.0**	**£0.1**	**£1.7**	**£30.3**	**£1.4**	**£0.0**	**£0.0**	**£0.0**	**£35.8**
	Hassocks	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£7.1	£2.0	£0.3	£10.1
	Hurstpierpoint	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£0.0	£4.5
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£6.0	£0.4	£0.0	£0.0	£0.0	£0.0	£6.3
	Cuckfield	£0.0	£0.0	£0.7	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
	Lindfield	£1.7	£0.0	£0.0	£0.2	£0.0	£0.3	£0.8	£0.0	£0.0	£0.0	£3.1
	Haywards Heath: All Other Shops & Stores	£6.7	£0.0	£1.9	£0.5	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£10.8
	Burgess Hill: All Other Shops & Stores	£0.2	£7.1	£0.2	£0.0	£0.0	£0.0	£0.8	£0.5	£0.5	£0.0	£8.0
	East Grinstead: All Other Shops & Stores	£0.0	£0.0	£0.0	£0.0	£1.4	£2.3	£0.0	£0.0	£0.0	£0.0	£3.9
	VILLAGE CENTRES, OTHER SHOPS & STORES:	**£8.7**	**£7.4**	**£2.7**	**£0.7**	**£7.7**	**£2.9**	**£2.9**	**£7.6**	**£6.9**	**£0.3**	**£47.8**
	Tesco, Jane Murray Way, Burgess Hill	£8.4	£46.9	£3.7	£0.4	£0.4	£0.0	£2.6	£8.8	£11.3	£1.7	£76.8
	Sainsbury's, Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£6.4	£54.4	£0.9	£0.0	£0.0	£0.0	£65.9
	Aldi, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£1.5	£19.8	£0.1	£0.0	£0.0	£0.0	£22.9
	Sainsbury's, Bannister Way, Haywards Heath	£48.2	£2.8	£7.6	£7.9	£0.0	£0.0	£11.8	£0.5	£0.9	£0.0	£81.0
	Other Out-of-Centre Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.3
	OUT-OF-CENTRE:	**£56.5**	**£49.7**	**£11.4**	**£8.3**	**£8.2**	**£74.4**	**£15.4**	**£9.3**	**£12.2**	**£1.7**	**£247.0**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£76.9**	**£91.0**	**£16.3**	**£10.6**	**£18.5**	**£107.7**	**£24.4**	**£20.7**	**£24.5**	**£3.2**	**£390.3**
OTHER CENTRES & STORES	Brighton	£0.7	£2.3	£0.7	£0.0	£0.0	£0.0	£0.2	£0.5	£1.5	£51.8	£59.6
	Crawley	£0.0	£1.7	£0.1	£41.3	£63.6	£4.0	£0.3	£0.0	£0.0	£0.0	£111.1
	Crowborough	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£2.9	£0.0	£0.0	£0.0	£3.7
	Hove	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.1	£12.1	£14.2
	Horsham	£0.0	£0.0	£0.2	£0.8	£0.0	£0.0	£0.0	£0.1	£1.6	£0.0	£2.8
	Lewes	£0.0	£0.6	£0.1	£0.0	£0.0	£0.0	£3.2	£0.9	£0.2	£0.2	£5.2
	Uckfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.7	£0.0	£0.0	£0.0	£8.8
	All Other Shops & Stores	£0.5	£0.4	£0.2	£5.5	£13.1	£2.6	£9.0	£0.6	£12.5	£6.8	£52.0
	ALL OUTSIDE STUDY AREA	**£1.3**	**£5.0**	**£1.4**	**£47.7**	**£76.7**	**£7.3**	**£24.3**	**£2.5**	**£17.0**	**£70.9**	**£257.5**
TOTAL MARKET SHARE		**£78.1**	**£96.0**	**£17.7**	**£58.3**	**£95.2**	**£114.9**	**£48.6**	**£23.2**	**£41.5**	**£74.1**	**£647.8**

Source: Table 3 and Table 4

TABLE 10: TRADE DRAW FROM OUTSIDE THE STUDY AREA AND TOTAL TURNOVER

	Estimated 'Inflow' from Outside Study Area (outside Zones 1-10)	2014	2019	2024	2029	2031
Main Town Centres:		**£79.7**	**£82.9**	**£87.7**	**£93.3**	**£95.6**
Haywards Heath Town Centre	*0%*	*£13.3*	*£13.8*	*£14.6*	*£15.5*	*£15.9*
Burgess Hill Town Centre	*0%*	*£36.6*	*£38.0*	*£40.2*	*£42.8*	*£43.9*
East Grinstead Centre	*0%*	*£29.9*	*£31.1*	*£32.9*	*£35.0*	*£35.8*
Village Centres & All Other Centres, Shops and Stores	**0%**	**£39.8**	**£41.4**	**£43.8**	**£46.6**	**£47.8**
Hassocks		*£8.4*	*£8.7*	*£9.2*	*£9.8*	*£10.1*
Hurstpierpoint		*£3.8*	*£3.9*	*£4.1*	*£4.4*	*£4.5*
Other Village Centres		*£8.7*	*£9.1*	*£9.6*	*£10.2*	*£10.4*
Haywards Heath: All Other Shops & Stores		*£9.0*	*£9.4*	*£9.9*	*£10.5*	*£10.8*
Burgess Hill: All Other Shops & Stores		*£6.7*	*£7.0*	*£7.4*	*£7.8*	*£8.0*
East Grinstead: All Other Shops & Stores		*£3.2*	*£3.4*	*£3.6*	*£3.8*	*£3.9*
Out of Centre Stores	**0%**	**£205.8**	**£214.1**	**£226.5**	**£241.2**	**£247.0**
Tesco, Jane Murray Way, Burgess Hill		*£64.0*	*£66.6*	*£70.4*	*£75.0*	*£76.8*
Sainsbury's, Brooklands Way, East Grinstead		*£55.0*	*£57.2*	*£60.5*	*£64.4*	*£65.9*
Aldi, London Road, East Grinstead		*£19.1*	*£19.9*	*£21.0*	*£22.4*	*£22.9*
Sainsbury's, Bannister Way, Haywards Heath		*£67.5*	*£70.3*	*£74.3*	*£79.1*	*£81.0*
Other Out-of-Centre Stores		*£0.2*	*£0.2*	*£0.3*	*£0.3*	*£0.3*
MID SUSSEX DISTRICT - TOTAL:		**£325.3**	**£338.4**	**£358.0**	**£381.1**	**£390.3**

Notes: The 'inflow' (trade draw) of expenditure from outside the study area to the District's main centres and stores are SP's judgements based on the available evidence. The 'inflow' respresents expenditure by commuters, visitors and tourists in shops and stores.

TABLE 11: NEW RETAIL COMMITMENTS - ESTIMATED CONVENIENCE GOODS SALES AREAS & BENCHMARK TURNOVERS.

	LPA Planning Ref	Estimated Sales Area	Average Sales	BENCHMARK TURNOVER ESTIMATES (£ million) 2014	2019	2024	2029	2031
		(m^2 net)	(£ per m^2)	£m	£m	£m	£m	£m
1. HAYWARDS HEATH: Station Redevelopment, Waitrose:	12/02935/FUL	2,323	£11,450	£26.6	£26.3	£26.2	£26.4	£26.4
2. HAYWARDS HEATH: Station Redevelopment, Other Convenience:	12/02935/FUL	83	£5,000	£0.4	£0.4	£0.4	£0.4	£0.4
3. HAYWARDS HEATH: Extension to One Stop, Walnut Park	14/01439/FUL	97	£6,500	£0.6	£0.6	£0.6	£0.6	£0.6
4. HAYWARDS HEATH: Former Mayflower Public House, America Lane	13/00970/FUL	529	£10,750	£5.7	£5.6	£5.6	£5.6	£5.6
5. EAST GRINSTEAD: 200 London Road	13/02762/COU	322	£10,750	£3.5	£3.4	£3.4	£3.4	£3.4
6. HASSOCKS: 22-24 Keymer Road, Hassocks	10/03696/FUL	49	£13,000	£0.6	£0.6	£0.6	£0.6	£0.6
TOTAL				**£37.4**	**£36.9**	**£36.9**	**£37.1**	**£37.2**

Note: Average 'Benchmark' Turnovers have been informed by a variety of sources (including Verdict Research and Mintel). The year-on-year growth in floorspace 'productivity' (turnover 'efficiency') is based on the latest Retail Planner Briefing Note published by Experian Business Strategies (October 2014: Addendum).

Source: 1. Permission granted for mixed use development by Solum Regeneration (JV between Network Rail and Kier) on land in and around Haywards Heath Railway Station to include a new Waitrose store. The sales area split between convenience and comparison goods has been taken from the planning application and Retail Assessment submitted by Savills (August 2012) in support of the redevelopment. In addition to the net sales area the foodstore will include a cafe (93 sq m) and will be served by some 208 parking spaces.

2. The Haywards Heath Railway Station also has permission for an additional 516 sqm gross of new Class A1-A4 floorspace. A net/gross floorspace ratio of 80% has been assumed for the purpose of this assessment; and that up to 20% of the new Class A1-A4 will be set aside for small-scale food and convenience goods retailing.

3. One Stop extension - floorspace sourced from planning application (planning ref: 14/01439/FUL). Assume net sales is 65% of gross floorspace (149m^2). * Sales density based on average sales for similar type convenience retailers.

4. Former Mayflower Public House - floorspace sourced planning application (planning ref: 13/02762/COU). Assume net sales is 70% of gross floorspace (813.5m^2). Sales density is based on the average sales for the UK's top four grocers.

5. 200 London Road - net sales area sourced from Design & Access Statement prepared by Lewis & Co Planning (planning ref: 13/02762/COU). Sales density is based on the average sales for the UK's top four grocers.

6. Permission granted at appeal (APP/D3830/A/11/2155099/NWF) for the demolition of the existing building at 22-24 Keymer Road and replacement with a larger building to include an expanded ground floor retail space from 199 sqm to 274 sqm. The retail unit will occupy amost all the footprint of the site at ground floor level and will be taken up by a Sainsbury's Local. Above the store will be 2-storeys of residential accommodation providing 4 flats, with 5 car parking spaces to the rear. The new store will therefore result in 75 sqm gross of net additional retail floorspace.

TABLE 12: MID SUSSEX DISTRICT - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£325.3	£338.4	£358.0	£381.1	£390.3
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£325.3	£321.1	£320.8	£322.4	£323.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£17.3	£37.2	£58.7	£67.2
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£36.9	£36.9	£37.1	£37.2
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£0.0**	**-£19.7**	**£0.3**	**£21.6**	**£30.1**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
	Superstore Format ('Top 5' grocers):					
	i Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,250	£12,092	£12,079	£12,140	£12,164
	ii **Net Floorspace Capacity (sq m):**	**-**	**-1,628**	**24**	**1,782**	**2,473**
	iii Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	iv Gross Floorspace Capacity (sq m):	0	-2,326	34	2,545	3,533
	Supermarket/Deep Discounter Format (e.g. Aldi, Lidl, Netto, Co-op, etc.):					
	i Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,429	£5,423	£5,451	£5,461
	ii **Net Floorspace Capacity (sq m):**	**-**	**-3,626**	**54**	**3,968**	**5,508**
	iii Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	iv Gross Floorspace Capacity (sq m):	-	-5,180	77	5,669	7,868

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 10).

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 12: Addendum* (October 2014) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 11. It is assumed for the purpose of this assessment that all commitments will be opened by 2019 and will have reached 'mature' trading conditions.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 13: **HAYWARDS HEATH - CONVENIENCE GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN HAYWARDS HEATH (£ m):	£89.8	£93.4	£98.8	£105.2	£107.7
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN HAYWARDS HEATH (£ m):	£89.8	£88.6	£88.5	£89.0	£89.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£4.8	£10.3	£16.2	£18.6
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m):	£0.0	£32.9	£32.9	£33.0	£33.1
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£0.0**	**-£28.1**	**-£22.6**	**-£16.8**	**-£14.5**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
	Superstore Format ('Top 5' grocers):					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,250	£12,092	£12,079	£12,140	£12,164
ii	**Net Floorspace Capacity (sq m):**	**-**	**-2,326**	**-1,870**	**-1,385**	**-1,195**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	0	-3,324	-2,672	-1,979	-1,707
	Supermarket/Deep Discounter Format (e.g. Aldi, Lidl, Netto, Co-op, etc.):					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,429	£5,423	£5,451	£5,461
ii	**Net Floorspace Capacity (sq m):**	**-**	**-5,182**	**-4,166**	**-3,086**	**-2,661**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-	-7,402	-5,952	-4,408	-3,801

TABLE 14: **BURGESS HILL - CONVENIENCE GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN BURGESS HILL (£ m):	£107.3	£111.6	£118.0	£125.6	£128.7
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN BURGESS HILL (£ m):	£107.3	£105.9	£105.8	£106.3	£106.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£5.7	£12.3	£19.4	£22.2
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£0.0**	**£5.7**	**£12.3**	**£19.4**	**£22.2**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
	Foodstore					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,250	£12,092	£12,079	£12,140	£12,164
ii	**Net Floorspace Capacity (sq m):**	**-**	**470**	**1,015**	**1,595**	**1,822**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	0	672	1,450	2,278	2,604
	Deep Discounter					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,429	£5,423	£5,451	£5,461
ii	**Net Floorspace Capacity (sq m):**	**-**	**1,048**	**2,261**	**3,552**	**4,059**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-	1,497	3,230	5,074	5,799

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TABLE 15: EAST GRINSTEAD TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£ m):	£107.2	£111.5	£117.9	£125.6	£128.6
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£ m):	£107.2	£105.8	£105.7	£106.2	£106.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£5.7	£12.3	£19.3	£22.2
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£3.4	£3.4	£3.4	£3.4
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£0.0**	**£2.3**	**£8.8**	**£15.9**	**£18.7**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
	Foodstore					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,250	£12,092	£12,079	£12,140	£12,164
ii	**Net Floorspace Capacity (sq m):**	**0**	**187**	**732**	**1,311**	**1,538**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	0	267	1,045	1,872	2,198
	Deep Discounter					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,429	£5,423	£5,451	£5,461
ii	**Net Floorspace Capacity (sq m):**	**-**	**417**	**1,629**	**2,919**	**3,426**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-	596	2,328	4,170	4,894

TABLE 16: HASSOCKS, HURSTPIERPOINT & OTHER MAIN VILLAGE CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£ m):	£20.9	£21.7	£23.0	£24.4	£25.0
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£ m):	£20.9	£20.6	£20.6	£20.7	£20.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£1.1	£2.4	£3.8	£4.3
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.6	£0.6	£0.6	£0.6
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£0.0**	**£0.5**	**£1.8**	**£3.1**	**£3.7**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
	Foodstore					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,250	£12,092	£12,079	£12,140	£12,164
ii	**Net Floorspace Capacity (sq m):**	**0**	**40**	**146**	**258**	**303**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	0	57	208	369	432
	Deep Discounter					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,429	£5,423	£5,451	£5,461
ii	**Net Floorspace Capacity (sq m):**	**-**	**89**	**325**	**576**	**674**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-	127	464	822	963

TABLE 17: MID SUSSEX DISTRICT'S MAIN STORES & CONVENIENCE FLOORSPACE
ESTIMATED SALES AREAS & BENCHMARK CONVENIENCE TURNOVERS

Main Foodstores	Net Sales (m^2)	% Convenience Sales	Conv Sales Area (m^2)	Sales Density (per m^2)	Turnover 2014
HAYWARDS HEATH TOWN CENTRE:					
Marks & Spencer (Foodhall), Orchards Shopping Centre	1,462	25%	366	£10,850	£4.0
Tesco Express, Orchards Shopping Centre	163	95%	154	£10,750	£1.7
Other Town Centre (including Iceland)	1,266	100%	1,266	£5,000	£6.3
Total Floorspace	**2,891**		**1,786**		**£12.0**
BURGESS HILL TOWN CENTRE:					
Lidl, The Martlets	673	80%	538	£4,500	£2.4
Waitrose, The Martlets	2,220	85%	1,887	£11,450	£21.6
Other Town Centre (including Iceland)	1,077	100%	1,077	£5,000	£5.4
Total Floorspace	**3,970**		**3,502**		**£29.4**
EAST GRINSTEAD TOWN CENTRE:					
Waitrose, West Street	1,849	95%	1,757	£11,450	£20.1
Other Town Centre (including Iceland)	1,531	100%	1,757	£5,000	£8.8
Total Floorspace	**3,380**		**3,513**		**£28.9**
OTHER CENTRES:					
Budgens, Hassocks	372	95%	353	£7,000	£2.5
OUT OF CENTRE:					
Aldi, London Road, East Grinstead	1,315	80%	1,052	£6,000	£6.3
Sainsbury's, Banister Way, Haywards Heath	3,682	60%	2,209	£13,000	£28.7
Sainsbury's, Brooklands Way, East Grinstead	2,794	60%	1,676	£13,000	£21.0
Tesco, Jane Murray Way, Burgess Hill	3,563	60%	2,138	£10,750	£23.0
Total Floorspace:	**11,354**		**7,075**		**£79.0**
TOTAL	**21,967**		**16,230**		**£151.7**

Source: Waitrose Burgess Hill includes extension (completed in November 2013). Net sales sourced from Design & Access Statement prepared by B&R Architects (planning ref: 13/00577/REM).

TABLE 18: MID SUSSEX DISTRICT'S MAIN CENTRES & STORES
DIFFERENCES BETWEEN 'BENCHMARK' & 'CURRENT' TURNOVER LEVELS AT 2014 .

Main Foodstores	'Benchmark' Turnover	'Current' Turnover	Difference	
HAYWARDS HEATH TOWN CENTRE:	**£11.96**	**£13.25**	**£1.3**	**11%**
BURGESS HILL TOWN CENTRE:	**£29.41**	**£36.56**	**£7.1**	**24%**
EAST GRINSTEAD TOWN CENTRE:	**£28.90**	**£29.86**	**£1.0**	**3%**
OUT OF CENTRE:				
Aldi, London Road, East Grinstead	£6.31	£19.12	£12.8	203%
Sainsbury's, Banister Way, Haywards Heath	£28.72	£67.55	£38.8	135%
Sainsbury's, Brooklands Way, East Grinstead	£20.96	£54.96	£34.0	162%
Tesco, Jane Murray Way, Burgess Hill	£22.98	£63.99	£41.0	178%
Total Floorspace:	**£78.97**	**£205.61**	**£126.6**	**160%**
TOTAL	**£149.23**	**£285.29**	**£136.05**	**191%**

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MID SUSSEX DISTRICT COUNCIL
COMPARISON GOODS CAPACITY ASSESSMENT

TABLE 1A: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2014) POPULATION & PROJECTIONS (to 2031)

ZONE:	2014	2019	2024	2029	2031	% GROWTH: 2014-31
Zone 1:	34,673	36,071	37,557	38,687	39,103	12.8%
Zone 2:	32,012	33,219	34,500	35,490	35,834	11.9%
Zone 3:	6,872	7,173	7,495	7,748	7,844	14.1%
Zone 4:	27,133	28,795	30,301	31,444	31,845	17.4%
Zone 5:	38,408	40,624	42,669	44,196	44,745	16.5%
Zone 6:	47,817	49,673	51,713	53,283	53,846	12.6%
Zone 7:	17,811	18,552	19,313	19,897	20,097	12.8%
Zone 8:	9,206	9,629	10,051	10,373	10,481	13.8%
Zone 9:	16,747	17,414	18,126	18,669	18,868	12.7%
Zone 10:	33,575	34,513	35,288	36,234	36,633	9.1%
TOTAL:	**264,254**	**275,663**	**287,013**	**296,021**	**299,296**	**13.3%**

Source: The base year (2014) population and projections to 2031 have been sourced directly from Experian's latest 'Retail Area Planner' Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 1B: MID SUSSEX DISTRICT COUNCIL - REVISED BASE YEAR (2014) POPULATION & PROJECTIONS (to 2031)

ZONE:	2014	2019	2024	2029	2031	% GROWTH: 2014-31
Zone 1:	34,673	34,923	35,392	35,917	36,127	4.2%
Zone 2:	32,012	34,512	38,510	42,883	44,632	39.4%
Zone 3:	6,872	7,035	7,198	7,361	7,427	8.1%
Zone 4:	27,133	28,092	29,050	30,009	30,393	12.0%
Zone 5:	38,408	39,408	40,850	42,401	43,022	12.0%
Zone 6:	47,817	48,067	48,897	49,873	50,263	5.1%
Zone 7:	17,811	18,061	18,429	18,827	18,986	6.6%
Zone 8:	9,206	9,440	9,673	9,907	10,000	8.6%
Zone 9:	16,747	16,872	17,246	17,682	17,857	6.6%
Zone 10:	33,575	34,075	35,069	36,186	36,633	9.1%
TOTAL:	**264,254**	**270,484**	**280,316**	**291,047**	**295,340**	**11.8%**

Source: The revised population projections for Mid Sussex District have been sourced from the local planning authority. These are taken from the ONS (Sub-National Population Projections – 2012 Base) released in May 2014 and have been adjusted by the local planning authority's demographers so that they are comparable with the plan period (i.e. April 2014-March 2031) and other datasets. Greater weight has been placed on the Council-derived population figures as the other evidence-based studies (e.g. SHMA) are using the same ONS published figures. SP has necessarily applied the year-on-year growth rates at the District level to the key zones that broadly make up the local authority area. In this case it is assumed that Zones 1-6 and Zone 9 are broadly equivalent to the Mid Sussex District area. SP has then allocated the forecast poulation growth to the different zones based on the planned and proposed housing allocations across the District and its main urban areas.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	% GROWTH: 2014-31
EXPERIAN - SPECIAL FORMS OF TRADING (%):		**11.7%**	**15.3%**	**16.0%**	**15.7%**	**15.5%**	32.5%
HOUSEHOLD SURVEY - REVISED SFT (%):		**15.8%**	**20.6%**	**21.6%**	**21.2%**	**20.9%**	32.5%
Zone 1:	£3,800	£3,201	£3,558	£4,120	£4,871	£5,215	52.3%
Zone 2:	£3,669	£3,090	£3,435	£3,977	£4,703	£5,035	52.3%
Zone 3:	£4,341	£3,657	£4,065	£4,706	£5,564	£5,958	52.3%
Zone 4:	£2,907	£2,449	£2,722	£3,152	£3,726	£3,990	52.3%
Zone 5:	£3,928	£3,309	£3,679	£4,259	£5,036	£5,392	52.3%
Zone 6:	£4,017	£3,384	£3,762	£4,355	£5,149	£5,513	52.3%
Zone 7:	£4,587	£3,864	£4,295	£4,973	£5,879	£6,295	52.3%
Zone 8:	£4,041	£3,404	£3,785	£4,382	£5,181	£5,547	52.3%
Zone 9:	£4,060	£3,420	£3,802	£4,402	£5,204	£5,572	52.3%
Zone 10:	£3,473	£2,926	£3,252	£3,766	£4,452	£4,767	52.3%

Source: Average spend per capita estimates for 2012 are derived from Experian *'Retail Area Planner' Reports* using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note.

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2014 - 2031 (£m)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	GROWTH: 2014-31 %	GROWTH: 2014-31 £m
Zone 1:	£131.7	£111.0	£124.3	£145.8	£174.9	£188.4	69.8%	£77.4
Zone 2:	£117.4	£98.9	£118.6	£153.2	£201.7	£224.7	127.2%	£125.8
Zone 3:	£29.8	£25.1	£28.6	£33.9	£41.0	£44.2	76.1%	£19.1
Zone 4:	£78.9	£66.4	£76.5	£91.6	£111.8	£121.3	82.5%	£54.8
Zone 5:	£150.9	£127.1	£145.0	£174.0	£213.5	£232.0	82.5%	£104.9
Zone 6:	£192.1	£161.8	£180.8	£213.0	£256.8	£277.1	71.3%	£115.3
Zone 7:	£81.7	£68.8	£77.6	£91.6	£110.7	£119.5	73.7%	£50.7
Zone 8:	£37.2	£31.3	£35.7	£42.4	£51.3	£55.5	77.0%	£24.1
Zone 9:	£68.0	£57.3	£64.1	£75.9	£92.0	£99.5	73.7%	£42.2
Zone 10:	£116.6	£98.2	£110.8	£132.1	£161.1	£174.6	77.8%	£76.4
TOTAL	**£1,004.4**	**£846.0**	**£961.9**	**£1,153.3**	**£1,414.8**	**£1,536.9**	**81.7%**	**£690.8**

Source: Total available expenditure within each zone has been calculated by multiplying the revised base year population and projections sourced from Mid Sussex District Council (Table 1B) and the expenditure per capita levels (Table 2).

TABLE 4: ALL COMPARISON GOODS - 2014 MARKET SHAREANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
MID SUSSEX	Haywards Heath Town Centre	46.2%	1.9%	28.9%	5.9%	0.2%	0.1%	25.4%	3.5%	2.8%	0.0%	9.7%
	Burgess Hill Town Centre	11.4%	52.1%	17.0%	0.8%	0.0%	0.0%	7.7%	33.4%	25.6%	2.1%	12.0%
	East Grinstead Town Centre	0.0%	0.0%	0.0%	2.1%	6.8%	45.0%	1.9%	0.0%	0.0%	0.0%	10.1%
	MAIN TOWN CENTRES:	**57.6%**	**54.0%**	**45.9%**	**8.8%**	**7.0%**	**45.1%**	**35.0%**	**36.9%**	**28.4%**	**2.1%**	**31.8%**
	Hassocks	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.1%	10.7%	1.6%	0.5%	0.6%
	Hurstpierpoint	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%	0.5%	4.4%	0.0%	0.4%
	Crawley Down	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cuckfield	0.4%	0.0%	3.1%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Lindfield	0.3%	0.0%	0.1%	0.1%	0.0%	0.0%	0.6%	0.2%	0.0%	0.0%	0.1%
	Other Mid Sussex Centres, Shops and Stores:	0.0%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
	ALL OTHER MID SUSSEX CENTRES & STORES	**0.7%**	**0.2%**	**4.3%**	**0.5%**	**0.4%**	**0.0%**	**0.8%**	**12.4%**	**6.0%**	**0.5%**	**1.3%**
	Mid Sussex Retail Park: Burgess Hill	0.5%	1.4%	1.7%	0.1%	0.0%	0.0%	0.6%	0.7%	1.2%	0.0%	0.4%
	Wickes: London Road, Burgess Hill	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%
	Tesco: Jane Murray Way, Burgess Hill	0.2%	0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.2%
	Other Out-of-Centre Stores: Burgess Hill	0.3%	1.1%	0.2%	0.0%	0.0%	0.0%	1.2%	1.7%	0.0%	0.0%	0.3%
	Bridge Retail Park: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%
	Wickes, Bridge Park, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%
	Homebase: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.2%	2.2%	0.1%	0.0%	0.0%	0.0%	0.5%
	Carpetright: London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%
	Sainsbury's: Brooklands Way, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%
	Sainsbury's: Bannister Way, Haywards Heath	0.8%	0.2%	1.2%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%
	MID SUSSEX OUT-OF-CENTRE STORES	**1.8%**	**3.3%**	**3.6%**	**0.5%**	**0.4%**	**5.3%**	**1.9%**	**4.2%**	**1.2%**	**0.1%**	**2.3%**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**60.1%**	**57.4%**	**53.8%**	**9.9%**	**7.8%**	**50.5%**	**37.7%**	**53.4%**	**35.7%**	**2.6%**	**35.4%**
OTHER CENTRES & STORES	Brighton	13.6%	17.7%	8.7%	2.8%	1.2%	3.8%	8.4%	32.6%	20.0%	68.4%	17.0%
	Crawley	17.1%	15.8%	22.9%	74.1%	76.4%	28.8%	6.4%	4.4%	4.9%	1.1%	28.5%
	Crowborough	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%
	Croydon	1.1%	1.2%	0.4%	1.9%	2.5%	2.5%	0.0%	0.0%	0.5%	0.6%	1.4%
	Horsham	0.4%	0.6%	5.3%	2.3%	1.8%	0.0%	0.2%	0.6%	11.1%	0.5%	1.6%
	Hove	0.1%	1.1%	0.4%	0.0%	0.1%	0.0%	0.0%	2.1%	7.4%	14.5%	2.6%
	Lewes	0.2%	0.2%	0.0%	0.0%	0.0%	0.1%	2.9%	0.3%	0.0%	0.4%	0.3%
	Shoreham	3.4%	1.0%	1.3%	0.2%	0.0%	0.1%	0.0%	1.3%	3.9%	3.3%	1.4%
	Tunbridge Wells	0.3%	0.2%	0.2%	0.6%	1.2%	9.6%	11.3%	0.0%	0.0%	0.0%	3.0%
	All Other Shops & Stores	3.7%	4.6%	6.9%	8.1%	9.1%	4.6%	32.6%	5.3%	16.6%	8.5%	8.8%
	ALL OUTSIDE STUDY AREA	39.9%	42.6%	46.2%	90.1%	92.2%	49.5%	62.3%	46.6%	64.3%	97.4%	64.6%
TOTAL MARKET SHARE		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Total comparison goods market share analysis derived from the shopping patterns and expenditure flows for different categories of comparison goods spend based on the household survey results (see Appendix 5).

TABLE 5: ALL COMPARISON GOODS - 2014 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
	TOTAL AVAILABLE EXPENDITURE IN 2014 (£m):	£111.0	£98.9	£25.1	£66.4	£127.1	£161.8	£68.8	£31.3	£57.3	£98.2	£846.0
MID SUSSEX	Haywards Heath Town Centre	£51.2	£1.9	£7.3	£3.9	£0.2	£0.2	£17.5	£1.1	£1.6	£0.0	£82.3
	Burgess Hill Town Centre	£12.7	£51.5	£4.3	£0.5	£0.0	£0.0	£5.3	£10.5	£14.7	£2.1	£101.5
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£1.4	£8.7	£72.8	£1.3	£0.0	£0.0	£0.0	£85.3
	MAIN TOWN CENTRES:	**£63.9**	**£53.4**	**£11.5**	**£5.9**	**£8.9**	**£73.0**	**£24.1**	**£11.5**	**£16.3**	**£2.1**	**£269.0**
	Hassocks	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£3.4	£0.9	£0.5	£5.1
	Hurstpierpoint	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£2.5	£0.0	£3.0
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
	Cuckfield	£0.4	£0.0	£0.8	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5
	Lindfield	£0.4	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.1	£0.0	£0.0	£0.9
	Other Mid Sussex Centres, Shops and Stores:	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.6
	ALL OTHER MID SUSSEX CENTRES & STORES	**£0.8**	**£0.1**	**£1.1**	**£0.3**	**£0.5**	**£0.0**	**£0.5**	**£3.9**	**£3.5**	**£0.5**	**£11.4**
	Mid Sussex Retail Park: Burgess Hill	£0.6	£1.4	£0.4	£0.0	£0.0	£0.0	£0.4	£0.2	£0.7	£0.0	£3.7
	Wickes: London Road, Burgess Hill	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3
	Tesco: Jane Murray Way, Burgess Hill	£0.2	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£1.4
	Other Out-of-Centre Stores: Burgess Hill	£0.3	£1.1	£0.0	£0.0	£0.0	£0.0	£0.8	£0.5	£0.0	£0.0	£2.7
	Bridge Retail Park: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£1.4
	Wickes, Bridge Park, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.2	£0.6	£0.0	£0.0	£0.0	£0.0	£0.8
	Homebase: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.2	£3.6	£0.1	£0.0	£0.0	£0.0	£3.9
	Carpetright: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£1.8
	Sainsbury's: Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0	£1.5
	Sainsbury's: Bannister Way, Haywards Heath	£0.9	£0.2	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7
	MID SUSSEX OUT-OF-CENTRE STORES	**£2.1**	**£3.3**	**£0.9**	**£0.4**	**£0.4**	**£8.6**	**£1.3**	**£1.3**	**£0.7**	**£0.1**	**£19.1**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£66.7**	**£56.8**	**£13.5**	**£6.6**	**£9.9**	**£81.7**	**£25.9**	**£16.7**	**£20.4**	**£2.6**	**£299.5**
OTHER CENTRES & STORES	Brighton	£15.1	£17.5	£2.2	£1.9	£1.6	£6.1	£5.8	£10.2	£11.5	£67.2	£143.7
	Crawley	£19.0	£15.7	£5.8	£49.3	£97.1	£46.6	£4.4	£1.4	£2.8	£1.1	£240.8
	Crowborough	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.5
	Croydon	£1.2	£1.2	£0.1	£1.3	£3.2	£4.1	£0.0	£0.0	£0.3	£0.6	£11.9
	Horsham	£0.5	£0.6	£1.3	£1.5	£2.3	£0.0	£0.1	£0.2	£6.3	£0.5	£13.6
	Hove	£0.1	£1.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.7	£4.2	£14.3	£21.7
	Lewes	£0.2	£0.2	£0.0	£0.0	£0.0	£0.2	£2.0	£0.1	£0.0	£0.4	£2.9
	Shoreham	£3.7	£1.0	£0.3	£0.1	£0.0	£0.2	£0.0	£0.4	£2.2	£3.3	£11.5
	Tunbridge Wells	£0.4	£0.2	£0.1	£0.4	£1.5	£15.5	£7.7	£0.0	£0.0	£0.0	£25.1
	All Other Shops & Stores	£4.1	£4.5	£1.7	£5.4	£11.5	£7.5	£22.4	£1.7	£9.5	£8.4	£74.8
	ALL OUTSIDE STUDY AREA	£44.3	£42.1	£11.6	£59.9	£117.2	£80.1	£42.9	£14.6	£36.8	£95.6	£546.5
TOTAL MARKET SHARE		**£111.0**	**£98.9**	**£25.1**	**£66.4**	**£127.1**	**£161.8**	**£68.8**	**£31.3**	**£57.3**	**£98.2**	**£846.0**

Source: Table 3 and Table 4

TABLE 6: ALL COMPARISON GOODS - 2019 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
	TOTAL AVAILABLE EXPENDITURE IN 2019 (£m):	£124.3	£118.6	£28.6	£76.5	£145.0	£180.8	£77.6	£35.7	£64.1	£110.8	£961.9
MID SUSSEX	Haywards Heath Town Centre	£57.3	£2.3	£8.3	£4.5	£0.3	£0.2	£19.7	£1.2	£1.8	£0.0	£93.6
	Burgess Hill Town Centre	£14.2	£61.7	£4.9	£0.6	£0.0	£0.0	£5.9	£11.9	£16.4	£2.3	£115.4
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£1.6	£9.9	£81.4	£1.5	£0.0	£0.0	£0.0	£97.0
	MAIN TOWN CENTRES:	**£71.5**	**£64.0**	**£13.1**	**£6.7**	**£10.2**	**£81.6**	**£27.2**	**£13.2**	**£18.2**	**£2.3**	**£305.9**
	Hassocks	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£3.8	£1.0	£0.5	£5.9
	Hurstpierpoint	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.2	£2.8	£0.0	£3.4
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
	Cuckfield	£0.4	£0.0	£0.9	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7
	Lindfield	£0.4	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.1	£0.0	£0.0	£1.0
	Other Mid Sussex Centres, Shops and Stores:	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.6
	ALL OTHER MID SUSSEX CENTRES & STORES	**£0.9**	**£0.2**	**£1.2**	**£0.4**	**£0.6**	**£0.0**	**£0.6**	**£4.4**	**£3.9**	**£0.5**	**£12.9**
	Mid Sussex Retail Park: Burgess Hill	£0.6	£1.6	£0.5	£0.0	£0.0	£0.0	£0.4	£0.3	£0.8	£0.0	£4.2
	Wickes: London Road, Burgess Hill	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3
	Tesco: Jane Murray Way, Burgess Hill	£0.3	£0.7	£0.2	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£1.6
	Other Out-of-Centre Stores: Burgess Hill	£0.4	£1.3	£0.0	£0.0	£0.0	£0.0	£0.9	£0.6	£0.0	£0.0	£3.1
	Bridge Retail Park: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£1.6
	Wickes, Bridge Park, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.0	£0.9
	Homebase: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.3	£4.0	£0.1	£0.0	£0.0	£0.0	£4.5
	Carpetright: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£2.0
	Sainsbury's: Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.1	£1.6	£0.0	£0.0	£0.0	£0.0	£1.7
	Sainsbury's: Bannister Way, Haywards Heath	£1.0	£0.2	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
	MID SUSSEX OUT-OF-CENTRE STORES	**£2.3**	**£3.9**	**£1.0**	**£0.4**	**£0.5**	**£9.7**	**£1.5**	**£1.5**	**£0.8**	**£0.1**	**£21.7**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£74.7**	**£68.1**	**£15.4**	**£7.5**	**£11.3**	**£91.3**	**£29.2**	**£19.1**	**£22.9**	**£2.9**	**£340.5**
OTHER CENTRES & STORES	Brighton	£16.9	£21.0	£2.5	£2.2	£1.8	£6.9	£6.5	£11.6	£12.8	£75.8	£163.4
	Crawley	£21.3	£18.8	£6.6	£56.7	£110.7	£52.0	£5.0	£1.6	£3.2	£1.2	£273.8
	Crowborough	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.6
	Croydon	£1.4	£1.5	£0.1	£1.4	£3.6	£4.5	£0.0	£0.0	£0.3	£0.6	£13.6
	Horsham	£0.5	£0.8	£1.5	£1.7	£2.6	£0.0	£0.1	£0.2	£7.1	£0.6	£15.4
	Hove	£0.1	£1.3	£0.1	£0.0	£0.1	£0.0	£0.0	£0.8	£4.7	£16.1	£24.6
	Lewes	£0.2	£0.3	£0.0	£0.0	£0.0	£0.3	£2.2	£0.1	£0.0	£0.4	£3.3
	Shoreham	£4.2	£1.2	£0.4	£0.1	£0.0	£0.2	£0.0	£0.5	£2.5	£3.7	£13.1
	Tunbridge Wells	£0.4	£0.3	£0.1	£0.4	£1.7	£17.3	£8.7	£0.0	£0.0	£0.0	£28.5
	All Other Shops & Stores	£4.5	£5.5	£2.0	£6.2	£13.2	£8.4	£25.3	£1.9	£10.6	£9.4	£85.1
	ALL OUTSIDE STUDY AREA	**£49.6**	**£50.5**	**£13.2**	**£68.9**	**£133.7**	**£89.5**	**£48.3**	**£16.6**	**£41.3**	**£107.9**	**£621.4**
TOTAL MARKET SHARE		**£124.3**	**£118.6**	**£28.6**	**£76.5**	**£145.0**	**£180.8**	**£77.6**	**£35.7**	**£64.1**	**£110.8**	**£961.9**

Source: Table 3 and Table 4

TABLE 7: ALL COMPARISON GOODS - 2024 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
	TOTAL AVAILABLE EXPENDITURE IN 2024 (£m):	£145.8	£153.2	£33.9	£91.6	£174.0	£213.0	£91.6	£42.4	£75.9	£132.1	£1,153.3
MID SUSSEX	Haywards Heath Town Centre	£67.3	£2.9	£9.8	£5.4	£0.3	£0.3	£23.3	£1.5	£2.1	£0.0	£112.2
	Burgess Hill Town Centre	£16.7	£79.7	£5.8	£0.8	£0.0	£0.0	£7.0	£14.2	£19.4	£2.8	£138.3
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£1.9	£11.9	£95.8	£1.8	£0.0	£0.0	£0.0	£116.3
	MAIN TOWN CENTRES:	**£83.9**	**£82.7**	**£15.5**	**£8.1**	**£12.2**	**£96.1**	**£32.1**	**£15.6**	**£21.6**	**£2.8**	**£366.8**
	Hassocks	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£4.5	£1.2	£0.7	£7.0
	Hurstpierpoint	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£0.2	£3.3	£0.0	£4.1
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
	Cuckfield	£0.5	£0.0	£1.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
	Lindfield	£0.5	£0.0	£0.0	£0.1	£0.0	£0.0	£0.5	£0.1	£0.0	£0.0	£1.2
	Other Mid Sussex Centres, Shops and Stores:	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.8
	ALL OTHER MID SUSSEX CENTRES & STORES	**£1.0**	**£0.2**	**£1.5**	**£0.5**	**£0.7**	**£0.0**	**£0.7**	**£5.2**	**£4.6**	**£0.7**	**£15.5**
	Mid Sussex Retail Park: Burgess Hill	£0.8	£2.1	£0.6	£0.0	£0.0	£0.0	£0.5	£0.3	£0.9	£0.0	£5.0
	Wickes: London Road, Burgess Hill	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4
	Tesco: Jane Murray Way, Burgess Hill	£0.3	£0.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£1.9
	Other Out-of-Centre Stores: Burgess Hill	£0.4	£1.7	£0.1	£0.0	£0.0	£0.0	£1.1	£0.7	£0.0	£0.0	£3.7
	Bridge Retail Park: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£1.9
	Wickes, Bridge Park, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.2	£0.8	£0.0	£0.0	£0.0	£0.0	£1.0
	Homebase: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.3	£4.7	£0.1	£0.0	£0.0	£0.0	£5.3
	Carpetright: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£2.4
	Sainsbury's: Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.1	£1.9	£0.0	£0.0	£0.0	£0.0	£2.0
	Sainsbury's: Bannister Way, Haywards Heath	£1.1	£0.2	£0.4	£0.4	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£2.3
	MID SUSSEX OUT-OF-CENTRE STORES	**£2.7**	**£5.1**	**£1.2**	**£0.5**	**£0.6**	**£11.4**	**£1.7**	**£1.8**	**£0.9**	**£0.1**	**£26.0**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£87.6**	**£88.0**	**£18.2**	**£9.0**	**£13.5**	**£107.5**	**£34.5**	**£22.6**	**£27.1**	**£3.5**	**£408.3**
OTHER CENTRES & STORES	Brighton	£19.9	£27.1	£2.9	£2.6	£2.2	£8.1	£7.7	£13.8	£15.2	£90.3	£195.9
	Crawley	£25.0	£24.3	£7.8	£67.9	£132.9	£61.3	£5.9	£1.8	£3.7	£1.5	£328.3
	Crowborough	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.7
	Croydon	£1.6	£1.9	£0.1	£1.7	£4.4	£5.3	£0.0	£0.0	£0.4	£0.8	£16.3
	Horsham	£0.6	£1.0	£1.8	£2.1	£3.2	£0.0	£0.2	£0.2	£8.4	£0.7	£18.5
	Hove	£0.1	£1.6	£0.1	£0.0	£0.1	£0.0	£0.0	£0.9	£5.6	£19.2	£29.5
	Lewes	£0.3	£0.4	£0.0	£0.0	£0.0	£0.3	£2.6	£0.1	£0.0	£0.5	£4.0
	Shoreham	£4.9	£1.6	£0.5	£0.1	£0.0	£0.2	£0.0	£0.5	£2.9	£4.4	£15.7
	Tunbridge Wells	£0.5	£0.3	£0.1	£0.5	£2.0	£20.4	£10.3	£0.0	£0.0	£0.0	£34.2
	All Other Shops & Stores	£5.3	£7.0	£2.3	£7.4	£15.8	£9.9	£29.8	£2.3	£12.6	£11.2	£102.0
	ALL OUTSIDE STUDY AREA	**£58.2**	**£65.2**	**£15.6**	**£82.5**	**£160.5**	**£105.5**	**£57.1**	**£19.7**	**£48.8**	**£128.6**	**£745.1**
TOTAL MARKET SHARE		**£145.8**	**£153.2**	**£33.9**	**£91.6**	**£174.0**	**£213.0**	**£91.6**	**£42.4**	**£75.9**	**£132.1**	**£1,153.3**

Source: Table 3 and Table 4

TABLE 8: ALL COMPARISON GOODS - 2029 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
	TOTAL AVAILABLE EXPENDITURE IN 2029 (£m):	£174.9	£201.7	£41.0	£111.8	£213.5	£256.8	£110.7	£51.3	£92.0	£161.1	£1,414.8
MID SUSSEX	Haywards Heath Town Centre	£80.7	£3.9	£11.8	£6.6	£0.4	£0.3	£28.1	£1.8	£2.6	£0.0	£137.6
	Burgess Hill Town Centre	£20.0	£105.0	£7.0	£0.9	£0.0	£0.0	£8.5	£17.1	£23.6	£3.4	£169.7
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£2.4	£14.6	£115.6	£2.1	£0.0	£0.0	£0.0	£142.7
	MAIN TOWN CENTRES:	**£100.7**	**£108.8**	**£18.8**	**£9.9**	**£15.0**	**£115.9**	**£38.8**	**£18.9**	**£26.2**	**£3.4**	**£449.9**
	Hassocks	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£5.5	£1.5	£0.8	£8.6
	Hurstpierpoint	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.2	£4.1	£0.0	£5.0
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
	Cuckfield	£0.6	£0.0	£1.3	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
	Lindfield	£0.6	£0.0	£0.0	£0.1	£0.0	£0.0	£0.6	£0.1	£0.0	£0.0	£1.5
	Other Mid Sussex Centres, Shops and Stores:	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.9
	ALL OTHER MID SUSSEX CENTRES & STORES	**£1.2**	**£0.3**	**£1.8**	**£0.6**	**£0.8**	**£0.0**	**£0.9**	**£6.3**	**£5.5**	**£0.8**	**£19.0**
	Mid Sussex Retail Park: Burgess Hill	£0.9	£2.8	£0.7	£0.1	£0.0	£0.0	£0.6	£0.4	£1.1	£0.0	£6.2
	Wickes: London Road, Burgess Hill	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5
	Tesco: Jane Murray Way, Burgess Hill	£0.4	£1.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£2.4
	Other Out-of-Centre Stores: Burgess Hill	£0.5	£2.3	£0.1	£0.0	£0.0	£0.0	£1.3	£0.8	£0.0	£0.0	£4.5
	Bridge Retail Park: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£2.3
	Wickes, Bridge Park, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.3	£0.9	£0.0	£0.0	£0.0	£0.0	£1.3
	Homebase: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.4	£5.7	£0.1	£0.0	£0.0	£0.0	£6.6
	Carpetright: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£2.9
	Sainsbury's: Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.1	£2.2	£0.0	£0.0	£0.0	£0.0	£2.5
	Sainsbury's: Bannister Way, Haywards Heath	£1.3	£0.3	£0.5	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£2.8
	MID SUSSEX OUT-OF-CENTRE STORES	**£3.2**	**£6.7**	**£1.5**	**£0.6**	**£0.7**	**£13.7**	**£2.1**	**£2.2**	**£1.1**	**£0.1**	**£31.9**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£105.2**	**£115.8**	**£22.0**	**£11.0**	**£16.6**	**£129.6**	**£41.7**	**£27.4**	**£32.8**	**£4.3**	**£500.8**
OTHER CENTRES & STORES	Brighton	£23.8	£35.7	£3.6	£3.2	£2.6	£9.7	£9.3	£16.7	£18.4	£110.2	£240.3
	Crawley	£30.0	£31.9	£9.4	£82.9	£163.1	£73.9	£7.1	£2.2	£4.5	£1.8	£402.7
	Crowborough	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.9
	Croydon	£1.9	£2.5	£0.2	£2.1	£5.3	£6.4	£0.0	£0.0	£0.5	£0.9	£20.0
	Horsham	£0.7	£1.3	£2.2	£2.5	£3.9	£0.0	£0.2	£0.3	£10.2	£0.8	£22.7
	Hove	£0.1	£2.1	£0.2	£0.0	£0.1	£0.0	£0.0	£1.1	£6.8	£23.4	£36.2
	Lewes	£0.3	£0.5	£0.0	£0.0	£0.0	£0.4	£3.2	£0.2	£0.0	£0.6	£4.9
	Shoreham	£5.9	£2.1	£0.5	£0.2	£0.0	£0.3	£0.0	£0.7	£3.6	£5.4	£19.3
	Tunbridge Wells	£0.6	£0.4	£0.1	£0.6	£2.5	£24.6	£12.5	£0.0	£0.0	£0.0	£41.9
	All Other Shops & Stores	£6.4	£9.3	£2.8	£9.1	£19.4	£11.9	£36.1	£2.7	£15.2	£13.7	£125.1
	ALL OUTSIDE STUDY AREA	£69.8	£85.8	£18.9	£100.8	£196.9	£127.2	£69.0	£23.9	£59.2	£156.8	£914.0
TOTAL MARKET SHARE		**£174.9**	**£201.7**	**£41.0**	**£111.8**	**£213.5**	**£256.8**	**£110.7**	**£51.3**	**£92.0**	**£161.1**	**£1,414.8**

Source: Table 3 and Table 4

TABLE 9: ALL COMPARISON GOODS - 2031 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)

		ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
	TOTAL AVAILABLE EXPENDITURE IN 2031 (£m):	£188.4	£224.7	£44.2	£121.3	£232.0	£277.1	£119.5	£55.5	£99.5	£174.6	£1,536.9
MID SUSSEX	Haywards Heath Town Centre	£87.0	£4.3	£12.8	£7.1	£0.4	£0.4	£30.4	£1.9	£2.8	£0.0	£149.5
	Burgess Hill Town Centre	£21.5	£117.0	£7.5	£1.0	£0.0	£0.0	£9.2	£18.5	£25.5	£3.7	£184.3
	East Grinstead Town Centre	£0.0	£0.0	£0.0	£2.6	£15.9	£124.7	£2.3	£0.0	£0.0	£0.0	£155.0
	MAIN TOWN CENTRES:	**£108.5**	**£121.3**	**£20.3**	**£10.7**	**£16.3**	**£125.1**	**£41.9**	**£20.4**	**£28.3**	**£3.7**	**£488.7**
	Hassocks	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£5.9	£1.6	£0.9	£9.4
	Hurstpierpoint	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.3	£4.4	£0.0	£5.5
	Crawley Down	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
	Cuckfield	£0.7	£0.0	£1.4	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7
	Lindfield	£0.6	£0.0	£0.0	£0.2	£0.0	£0.0	£0.7	£0.1	£0.0	£0.0	£1.6
	Other Mid Sussex Centres, Shops and Stores:	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£1.0
	ALL OTHER MID SUSSEX CENTRES & STORES	**£1.3**	**£0.3**	**£1.9**	**£0.6**	**£0.9**	**£0.0**	**£0.9**	**£6.9**	**£6.0**	**£0.9**	**£20.6**
	Mid Sussex Retail Park: Burgess Hill	£1.0	£3.1	£0.8	£0.1	£0.0	£0.0	£0.7	£0.4	£1.2	£0.0	£6.7
	Wickes: London Road, Burgess Hill	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5
	Tesco: Jane Murray Way, Burgess Hill	£0.4	£1.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£2.6
	Other Out-of-Centre Stores: Burgess Hill	£0.5	£2.5	£0.1	£0.0	£0.0	£0.0	£1.4	£0.9	£0.0	£0.0	£4.9
	Bridge Retail Park: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£2.5
	Wickes, Bridge Park, London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.3	£1.0	£0.0	£0.0	£0.0	£0.0	£1.4
	Homebase: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.4	£6.1	£0.1	£0.0	£0.0	£0.0	£7.1
	Carpetright: London Road, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.0	£0.0	£0.0	£3.2
	Sainsbury's: Brooklands Way, East Grinstead	£0.0	£0.0	£0.0	£0.0	£0.1	£2.4	£0.0	£0.0	£0.0	£0.0	£2.7
	Sainsbury's: Bannister Way, Haywards Heath	£1.5	£0.4	£0.5	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£3.0
	MID SUSSEX OUT-OF-CENTRE STORES	**£3.5**	**£7.4**	**£1.6**	**£0.7**	**£0.8**	**£14.8**	**£2.2**	**£2.3**	**£1.2**	**£0.1**	**£34.7**
	MID SUSSEX DISTRICT: RETENTION LEVEL	**£113.3**	**£129.1**	**£23.8**	**£12.0**	**£18.0**	**£139.9**	**£45.0**	**£29.6**	**£35.5**	**£4.6**	**£544.0**
OTHER CENTRES & STORES	Brighton	£25.7	£39.7	£3.8	£3.4	£2.9	£10.5	£10.0	£18.1	£19.9	£119.5	£261.0
	Crawley	£32.3	£35.6	£10.1	£89.9	£177.2	£79.7	£7.7	£2.4	£4.9	£1.9	£437.4
	Crowborough	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.9
	Croydon	£2.1	£2.8	£0.2	£2.3	£5.8	£7.0	£0.0	£0.0	£0.5	£1.0	£21.7
	Horsham	£0.8	£1.5	£2.3	£2.7	£4.2	£0.0	£0.2	£0.3	£11.0	£0.9	£24.7
	Hove	£0.1	£2.4	£0.2	£0.0	£0.1	£0.0	£0.0	£1.2	£7.3	£25.4	£39.4
	Lewes	£0.4	£0.5	£0.0	£0.0	£0.0	£0.4	£3.4	£0.2	£0.0	£0.7	£5.3
	Shoreham	£6.3	£2.3	£0.6	£0.2	£0.0	£0.3	£0.0	£0.7	£3.8	£5.8	£20.9
	Tunbridge Wells	£0.6	£0.5	£0.1	£0.7	£2.7	£26.5	£13.5	£0.0	£0.0	£0.0	£45.5
	All Other Shops & Stores	£6.9	£10.3	£3.1	£9.8	£21.1	£12.8	£38.9	£3.0	£16.5	£14.9	£135.9
	ALL OUTSIDE STUDY AREA	£75.2	£95.7	£20.4	£109.3	£213.9	£137.2	£74.5	£25.8	£64.0	£170.0	£992.8
TOTAL MARKET SHARE		**£188.4**	**£224.7**	**£44.2**	**£121.3**	**£232.0**	**£277.1**	**£119.5**	**£55.5**	**£99.5**	**£174.6**	**£1,536.9**

Source: Table 3 and Table 4

TABLE 10: ESTIMATED 'INFLOW' (TRADE DRAW) FROM OUTSIDE STUDY AREA & TOTAL FORECAST TURNOVERS

		Estimated 'Inflow' from Outside Study Area	2014	2019	2024	2029	2031
Main Town Centres:			**£283.2**	**£322.0**	**£386.1**	**£473.6**	**£514.5**
	Haywards Heath Town Centre	5%	£86.6	£98.5	£118.1	£144.9	£157.3
	Burgess Hill Town Centre	5%	£106.8	£121.4	£145.6	£178.6	£194.0
	East Grimstead Town Centre	5%	£89.8	£102.1	£122.4	£150.2	£163.1
Other Centres/Shops in Mid Sussex		**0%**	**£11.4**	**£13.0**	**£15.6**	**£19.1**	**£20.8**
	Hassocks	1%	£5.2	£5.9	£7.1	£8.7	£9.4
	Hurstpierpoint	1%	£3.0	£3.4	£4.1	£5.1	£5.5
	Other Village Centres/ Shops	0%	£3.2	£3.6	£4.4	£5.4	£5.8
Out of Centre		**0%**	**£19.7**	**£22.5**	**£26.9**	**£33.0**	**£35.9**
	Haywards Heath: Out-of-Centre	0%	£1.7	£1.9	£2.3	£2.8	£3.0
	Burgess Hill: Out-of-Centre	2%	£8.3	£9.4	£11.3	£13.8	£15.0
	East Grinstead: Out-of-Centre	5%	£9.8	£11.2	£13.4	£16.4	£17.8
MID SUSSEX DISTRICT - TOTAL:			**£314.4**	**£357.5**	**£428.6**	**£525.8**	**£571.1**

Notes: 'Inflow' (trade draw) represents the potential expenditure from commuters, tourists and visitors to the District's main centres, shops and stores who live outside the defined study area (i.e. beyond Zones 1-10).

TABLE 11: NEW RETAIL COMMITMENTS - ESTIMATED COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVERS.

	LPA Planning Ref	Estimated Sales Area (m^2 net)	Average Sales (£ per m^2)	2014	2019	2024	2029	2031
1. HAYWARDS HEATH: Station Redevelopment, Waitrose:	12/02935/FU	279	£6,500	-	£2.0	£2.3	£2.5	£2.6
2. HAYWARDS HEATH: Station Redevelopment, Other Comparison:	12/02935/FU	83	£4,500	-	£0.4	£0.5	£0.5	£0.5
TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPACE (£m):				**-**	**£2.5**	**£2.7**	**£3.0**	**£3.2**

Source: 1. Permission granted for mixed use development by Solum Regeneration (JV between Network Rail and Kier) on land in and around Haywards Heath Railway Station to include a new Waitrose store. The sales area split between convenience and comparison goods has been taken from the planning application and Retail Assessment submitted by Savills (August 2012) in support of the redevelopment. In addition to the net sales area the foodstore will include a cafe (93 sq m) and will be served by some 208 parking spaces.

2. The Haywards Heath Railway Station also has permission for an additional 516 sqm gross of new Class A1-A4 floorspace. A net/gross floorspace ratio of 80% has been assumed for the purpose of this assessment; and that up to 20% of the new Class A1-A4 will be set aside for small-scale comparison goods retailing.

TABLE 12: MID SUSSEX DISTRICT - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m):	£314.4	£357.5	£428.6	£525.8	£571.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m) (1):	£314.4	£354.3	£393.4	£438.7	£458.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£3.2	£35.1	£87.1	£112.9
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.5	£2.7	£3.0	£3.2
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.7**	**£32.4**	**£84.0**	**£109.7**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£6,198	£6,883	£7,674	£8,016
	(ii) Net Floorspace Capacity (sq m):	**0**	**117**	**4,707**	**10,950**	**13,689**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	167	6,725	15,643	19,556

STEP 1: The (survey-derived) 'current' turnovers assume constant market shares over the forecast period (derived from Table 10).

STEP 2: An allowance has been made for the growth in 'productivity' ('efficiency') of all existing and new comparison goods floorspace based on the most recent annual growth rates published by Experian Business Strategies in Retail Planner Briefing Note 12: Addendum (October 2014).

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from Table 11. It is assumed for the purpose of this assessment that all commitments will be opened by 2019 and will have reached 'mature' trading conditions.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 13: HAYWARDS HEATH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN HAYWARDS HEATH (£m):	£88.3	£100.4	£120.3	£147.6	£160.4
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN HAYWARDS HEATH (£m) (1):	£88.3	£99.5	£110.5	£123.2	£128.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.9	£9.9	£24.5	£31.7
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.5	£2.7	£3.0	£3.2
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**-£1.6**	**£7.1**	**£21.4**	**£28.5**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£6,198	£6,883	£7,674	£8,016
	(ii) Net Floorspace Capacity (sq m):	**0**	**-253**	**1,036**	**2,789**	**3,558**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-361	1,480	3,984	5,083

TABLE 14: BURGESS HILL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN BURGESS HILL (£m):	£115.1	£130.8	£156.9	£192.4	£209.0
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN BURGESS HILL (£m) (1):	£115.1	£129.7	£144.0	£160.6	£167.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£1.2	£12.9	£31.9	£41.3
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.2**	**£12.9**	**£31.9**	**£41.3**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£6,198	£6,883	£7,674	£8,016
	(ii) Net Floorspace Capacity (sq m):	**0**	**188**	**1,868**	**4,153**	**5,156**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	269	2,669	5,933	7,365

TABLE 15: EAST GRINSTEAD - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£m):	£99.6	£113.2	£135.8	£166.6	£180.9
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL TOWN CENTRE & OUT-OF-CENTRE FLOORSPACE IN EAST GRINSTEAD (£m) (1):	£99.6	£112.2	£124.6	£139.0	£145.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£1.0	£11.1	£27.6	£35.8
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£1.0**	**£11.1**	**£27.6**	**£35.8**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£6,198	£6,883	£7,674	£8,016
	(ii) Net Floorspace Capacity (sq m):	**0**	**163**	**1,617**	**3,595**	**4,463**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	233	2,310	5,136	6,375

TABLE 16: HASSOCKS, HURSTPIERPOINT & OTHER MAIN VILLAGE CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031
STEP 1:	TOTAL 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£11.4	£13.0	£15.6	£19.1	£20.8
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£11.4	£12.9	£14.3	£16.0	£16.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.1	£1.3	£3.2	£4.1
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**£0.0**	**£0.1**	**£1.3**	**£3.2**	**£4.1**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£6,198	£6,883	£7,674	£8,016
	(ii) Net Floorspace Capacity (sq m):	**0**	**19**	**186**	**413**	**512**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	27	265	590	732