strategicperspectives

Retail Study Update 2012

Dover District Council

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Dover District Council Retail Study Update 2012

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CONTENTS

EXECUTIVE SUMMARY

Strategic Perspectives (SP) was commissioned by Dover District Council in May 2012 to produce an updated Retail Study for the District, taking into account and updating the previous 2007 Retail Need Assessment Study (RNAS) prepared by Kent County Council and various updates in 2007 and 2008.

This study has been prepared in the context of current and emerging national and development plan policy guidance. It specifically takes into account the advice set out in the National Planning Policy Framework (NPPF) published in March 2012. The study approach has also been informed by other key material considerations, including the *Practice Guidance on Need, Impact and the Sequential Approach* (the '*Practice Guidance*').

The study is informed by a combination of desk-top and primary research including

- the commissioning of a household telephone interview survey (HTIS) to help establish current shopping patterns and expenditure;
- an assessment of existing retail provision in the District;
- a detailed market share analysis of convenience and comparison goods expenditure; and
- an economic/quantitative capacity assessment for both convenience goods and comparison goods floorspace up to 2026 (and 2031).

In terms of current shopping patterns for convenience goods (food), the survey evidence shows that all the District's main centres and stores are retaining a relatively high proportion (76.3%) of shopping trips and expenditure across the study area. There is a particularly high retention rate in Dover (94.7%, of which 2% and 83% are accounted for by edge- and out-of-centre facilities respectively) and Deal (94.7%, of which 62% and 2% are accounted for by edge and out of centre facilities respectively) defined primary catchment areas (PCAs). Sandwich retains less convenience goods expenditure (65.1%) and this is mainly due to the attraction of convenience (and comparison goods) shopping provision in Westwood Cross, Canterbury and Folkestone. There is also a reasonable district-wide retention rate in Zone 7 (47.0%) and Zone 8 (26.6%), bearing in mind the attraction and proximity of facilities outside of the District. Compared to the results of the 2007 RNAS, the 2012 market share assessment shows that the overall retention of convenience goods shopping in the District has increased from 73.7% in 2007 to 76.3% in 2012.

For comparison goods the 2012 market share assessment shows that 44.5% of all expenditure is retained by stores and centres within the District. This is an improvement from the 38.2% retention rate (for both core comparison and bulky goods) recorded in 2007. Within Dover's PCA, *"in centre"* shops and facilities attract the majority of comparison goods expenditure across different categories of comparison goods expenditure. *"In centre"* destinations also attract a reasonable share of comparison goods expenditure across all other zones in the study area (ranging from 3.7% in Zone 6 to 16.6% in Zone 3) bearing in mind the strong attraction of competing facilities outside of the District such as Canterbury. In contrast *"out of centre"* destinations in Dover account for 13.4% of all comparison goods expenditure across the study area and only achieve a higher market share than the town centre in the sub-categories of DIY, gardening and CDs/DVDs.

Deal and Sandwich centres account for 11.6% and 1.7% of total comparison goods respectively across the study area as a whole. Sandwich Rural Service Centre has a limited role in retaining comparison goods expenditure, and accounts for less than 2% of all comparison goods expenditure across the study area. This is consistent with its role within the retail hierarchy.

Overall, comparison goods expenditure attracted to centres and stores outside of the District is mostly captured by Canterbury (27.2%), Westwood Cross (12.4%) and Folkestone (10.4%). As expected, the 'leakage' of shopping trips and expenditure is higher around the periphery of the study area (particularly in Zones 6-8).

With regards to internet spending, the household survey shows that the internet accounted for roughly 3.7% of combined convenience goods expenditure in 2012. This is similar to the conclusions of the 2007 study. For comparison goods, the 2012 HTIS indicates that approximately 7.1% of comparison goods expenditure across the study area can be attributed to the internet.

Whilst the District's smaller centres have a much more limited draw for both main food and comparison goods shopping, they are important destinations for more frequent top-up food shopping and meeting the day-to-day needs of their local catchment populations.

The results of the market share analysis were used to inform the retail capacity assessments for both convenience and comparison goods floorspace. These assessments are informed by and take into account various key assumptions and forecasts including, *inter alia*,

- baseline population levels and population growth forecasts;
- expenditure per capita levels and forecasts;
- an allowance for special forms of trading (including Internet shopping);
- existing floorspace and 'benchmark' turnover levels;
- an allowance for the growth in floorspace 'productivity';
- planned housing growth; and
- existing retail commitments and strategic allocations.

The table below summarises the results of the convenience goods capacity assessment.

CONVENIENCE GOODS - SUMMARY TABLE

	2012	2017	2022	2026	2027	2031
Dover						
Baseline Expenditure	£10.8	£17.4	£25.3	£28.0	£29.6	£36.4
Commitments	-£38.5	-£38.8	-£39.3	-£39.9	-£40.0	-£40.5
Planned Housing Growth	£1.3	£8.0	£16.0	£20.9	£23.2	£33.0
Total Available Expenditure	-£26.4	-£13.3	£2.1	£9.0	£12.8	£29.0
Net floorspace capacity for new superstore	**-2,198**	**-1,101**	**172**	**726**	**1,028**	**2,293**
Gross floorspace capacity for new superstore	**-3,140**	**-1,573**	**245**	**1,037**	**1,469**	**3,276**
Dover (including Strategic Allocations)						
Baseline Expenditure	£10.8	£17.4	£25.3	£28.0	£29.6	£36.4
Commitments	-£38.5	-£38.8	-£39.3	-£39.9	-£40.0	-£40.5
Strategic Allocations	-£46.7	-£47.0	-£47.7	-£48.4	-£48.5	-£49.1
Planned Housing Growth	£1.3	£8.0	£16.0	£20.9	£23.2	£33.0
Total Available Expenditure	-£73.0	-£60.4	-£45.6	-£39.3	-£35.7	-£20.2
Net floorspace capacity for new superstore	**-6,087**	**-4,983**	**-3,706**	**-3,163**	**-2,861**	**-1,596**
Gross floorspace capacity for new superstore	**-8,696**	**-7,118**	**-5,294**	**-4,519**	**-4,088**	**-2,280**
Deal/Sandwich						
Baseline Expenditure	£6.0	£9.6	£14.0	£15.5	£16.3	£20.1
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Planned Housing Growth	£0.5	£2.9	£5.1	£5.8	£5.9	£6.0
Total Available Expenditure	£6.4	£12.5	£19.0	£21.3	£22.2	£26.1
Net floorspace capacity for new superstore	**537**	**1,030**	**1,548**	**1,711**	**1,777**	**2,064**
Gross floorspace capacity for new superstore	**767**	**1,472**	**2,212**	**2,445**	**2,538**	**2,949**
All other in District						
Baseline Expenditure	£0.6	£1.0	£1.4	£1.6	£1.7	£2.0
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Planned Housing Growth	£0.5	£3.2	£5.8	£6.9	£6.9	£7.1
Total Available Expenditure	£1.1	£4.2	£7.2	£8.4	£8.6	£9.1
Net floorspace capacity for new superstore	**95**	**346**	**587**	**678**	**686**	**720**
Gross floorspace capacity for new superstore	**135**	**495**	**838**	**968**	**979**	**1,029**
District Total						
Net floorspace capacity	-1,566	276	2,307	3,115	3,490	5,078
Gross Floorspace capacity	-2,237	394	3,295	4,450	4,986	7,254
District Total (incl. Strategic Allocations)						
Net floorspace capacity	-5,456	-3,606	-1,571	-774	-399	1,189
Gross Floorspace capacity	-7,794	-5,151	-2,244	-1,106	-570	1,698

Notes: Retail commitments and strategic allocations are detailed in Table 16 of Appendix 6. This includes: 3,205 sqm net (or circa 5.450 sqm gross) at St. James Area which is estimated to turnover £38.5m in 2012; 3,500 sqm net (or 5,000 sqm gross) at Dover Waterfront which is estimated to turnover £42.0m in 2012; and 668 sqm net (or 1,335 sqm gross) in the Whitfield Urban Extension which is estimated to turnover £4.7m in 2012.

Taking into account both existing commitments and strategic allocations, the updated **convenience goods** retail assessment forecasts no capacity for new retail floorspace across the District up to 2026. This is explained by the significant strategic allocations identified by the local planning authority in the Dover Urban Area. Notwithstanding this, taking into account strategic allocations there is District wide capacity for 1,189 sqm (net) of new "superstore format" convenience floorspace by 2031.

To be consistent with the Core Strategy, the study distributes convenience floorspace requirements between Dover, Deal/Sandwich and elsewhere in the District according to a constant market share approach. This more detailed analysis confirms that there is no capacity for new convenience goods retail floorspace in Dover up to 2031 over and above existing planned commitments and strategic allocations. However the retail forecasts do identify capacity in the Deal/Sandwich area for circa 1,711 sqm net (2,450 sqm gross) of new ('superstore format') retail floorspace by 2026, growing to 2,064 sqm net (2,949 gross) by 2031. This suggests that there is quantitative capacity for either a new foodstore or possible extensions to existing foodstores in this area over the development plan period.

It should be noted that the base year (2012) capacity forecasts for convenience goods retailing are predicated on the future redistribution of residual expenditure from the District's existing out-of-centre stores (as a result of nominal 'over-trading') to new floorspace in Dover town centre. If there are no suitable and viable sites in Dover town centre or other centres that can meet the identified capacity, then any proposals for new retail floorspace in edge and/or out-of-centre locations will need to be assessed against the sequential and impact 'tests' in accordance with the advice set out in the NPPF.

As shown in the summary table below, for **comparison goods** the forecasts show no capacity for new retail floorspace across the District up to 2026. This is also explained by the significant new planned strategic allocations identified in Dover over the development plan period. Although there is no quantitative need for additional comparison goods floorspace in Dover (taking into account strategic allocations), there is forecast capacity for circa 5,401 sqm net (7,716 sqm gross) of new comparison goods floorspace in the Deal/Sandwich area at 2026.

COMPARISON GOODS - SUMMARY TABLE

	2012	2017	2022	2026	2027	2031
Dover						
Baseline Expenditure	£0.0	£10.9	£29.9	£44.3	£49.4	£69.0
Commitments	-£45.6	-£47.9	-£50.3	-£52.9	-£53.4	-£55.6
Planned Housing Growth	£1.9	£7.3	£16.6	£24.0	£27.4	£42.8
Total Available Expenditure	-£43.7	-£29.6	-£3.8	£15.4	£23.4	£56.2
Net floorspace capacity	**-10,933**	**-6,904**	**-818**	**3,143**	**4,693**	**10,643**
Gross floorspace capacity	**-15,619**	**-9,863**	**-1,168**	**4,490**	**6,704**	**15,204**
Dover (including Strategic Allocations)						
Baseline Expenditure	£0.0	£10.9	£29.9	£44.3	£49.4	£69.0
Commitments	-£45.6	-£47.9	-£50.3	-£52.9	-£53.4	-£55.6
Strategic Allocations	-£71.5	-£75.0	-£78.9	-£82.9	-£83.7	-£87.1
Planned Housing Growth	£1.9	£7.3	£16.6	£24.0	£27.4	£42.8
Total Available Expenditure	-£115.3	-£104.6	-£82.6	-£67.5	-£60.4	-£30.9
Net floorspace capacity	**-28,818**	**-24,403**	**-17,891**	**-13,763**	**-12,130**	**-5,851**
Gross floorspace capacity	**-41,168**	**-34,862**	**-25,558**	**-19,662**	**-17,329**	**-8,359**
Deal/Sandwich						
Baseline Expenditure	£0.0	£4.9	£13.3	£19.8	£22.0	£30.8
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Planned Housing Growth	£1.0	£2.7	£5.3	£6.7	£6.9	£7.8
Total Available Expenditure						
Net floorspace capacity	**260**	**1,756**	**4,025**	**5,401**	**5,817**	**7,301**
Gross floorspace capacity	**371**	**2,509**	**5,750**	**7,716**	**8,310**	**10,430**
All other in District						
Baseline Expenditure	£0.0	£0.4	£1.2	£1.7	£1.9	£2.7
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Planned Housing Growth	£0.2	£1.2	£2.4	£3.1	£3.2	£3.6
Total Available Expenditure	£0.2	£1.7	£3.6	£4.8	£5.1	£6.3
Net floorspace capacity	**62**	**388**	**775**	**987**	**1,031**	**1,191**
Gross floorspace capacity	**88**	**554**	**1,108**	**1,410**	**1,473**	**1,702**
District Total						
Net floorspace capacity	-10,612	-4,760	3,982	9,531	11,541	19,135
Gross Floorspace capacity	-28,358	-21,340	-11,034	-4,637	-2,347	6,281
District Total (incl. Strategic Allocations)						
Net floorspace capacity	-28,496	-22,259	-13,091	-7,375	-5,282	2,641
Gross Floorspace capacity	-40,709	-31,799	-18,701	-10,536	-7,546	3,774

Notes: Retail commitments and strategic allocations are detailed in Table 16 of Appendix 7. This includes: 3,901 sqm net (or 5,574 sqm gross) at White Cliffs Business Park which is estimated to turnover £15.6m in 2012; 7,477 sqm net (or 12,712 sqm gross) at St. James which is estimated to turnover £30.0m in 2012; 6,672 sqm net (or 11,342 sqm gross) at Dover Mid-Town which is expected to turn over £26.8m in 2012; 10,500 sqm net (or 15,000 sqm gross) at Dover Waterfront which is expected to turnover £42.1m in 2012; and 668 sqm net (or 1,335 sqm gross) in the Whitfield Urban Extension which is estimated to turnover £2.7m in 2012.

It is important to state that the capacity forecasts should be treated with caution, particularly post-2017. This is because they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the forecast growth in retail spending, an allowance for the growth in Internet shopping, etc.

Furthermore, the forecasts do not model the potential uplift in 'retention levels' that can occur within catchment areas following the delivery of significant new planned retail floorspace (such as the St. James Development), as well as strategic allocations. In particular, the delivery of the St. James Development and strategic allocations at Dover Mid-town and Dover Waterfront will likely result in an overall uplift in market share and increase comparison goods expenditure in the area available to support additional new floorspace. Therefore, it does not necessarily mean that there is an overprovision of comparison goods floorspace in the District.

With regard to policy boundaries, the study shows that there are high vacancy rates in Dover and the centre is significantly under-represented in terms of convenience goods provision. Dependent upon good design and connections, we anticipate that the implementation of the St. James's development and the promotion of the strategic allocation at the Dover Waterfront for new retail facilities will provide an important anchor to the south of the town centre and generate wider enhancement to the centre through linked trips. As such, we consider that there is merit in including these areas within the Dover town centre boundary. We advise that the Council investigate the impact of these developments on the wider town centre upon implementation to determine whether they should be incorporated within the primary shopping frontage.

Within Deal, the mix of uses in the Experian defined centre is comparable to national averages. We advise that the Council consider incorporating a cluster of retail uses (including several convenience units) to the north of the defined centre within the town centre boundary to afford this area policy protection and to recognise its role as a natural extension to the High Street. Due to its immediate proximity to the defined town centre boundary and its important role in retaining local expenditure, and recommend that the Council consider incorporating the Sainsbury's on West Street within the defined town centre boundary.

In Sandwich, we advise that the Council defines a primary shopping area or town centre boundary around the extent of the current secondary shopping frontage to provide clarity with respect to which sites can be defined as "in", "edge" or "out" of centre. Where appropriate, the Council should consider establishing similar boundaries in the District's other local centres and around concentrated local services areas within the built up urban areas of Dover and Deal (such as Temple Ewell, Whitfield and Walmer).

It is also recommended that the District Council set a local threshold above which they have the discretion to require applications for retail floorspace to include an impact assessment to demonstrate that the proposal would not have a significant adverse impact on existing, committed and planned public and private investment in centres and town centre vitality and viability. For convenience goods, the Council will require a retail impact assessment for developments above 250 sqm (net) as this is the general threshold above which smaller centres could experience a negative impact as a result of branded multi-national operators. For comparison goods, this will depend upon the relative health, location and scale of each centre's non-food offer, however we suggest that the Council reserve the right to request an RIA above for applications above 500 sqm (net).

1.0 INTRODUCTION

1.1 Strategic Perspectives (SP) was commissioned by Dover District Council in May 2012 to produce an updated Retail Study for the District, taking into account and updating the previous 2007 Retail Need Assessment Study prepared by Kent County Council and various updates in 2007 and 2008.

1.2 This updated study will help form a robust evidence base to inform and support relevant retail policies within the emerging Land Allocations Document and will help the District prepare and plan for retail needs up to 2031. It will also provide updated guidance on the scale and mix of new retail floorspace for the District in light of changes in the economic climate, policy, shopping patterns, development pipeline, and retailer presence and demand.

1.3 The study has been prepared in the context of current and emerging national and development plan policy guidance. It specifically takes into account the advice set out in the National Planning Policy Framework (NPPF) published in March 2012. The study approach has also been informed by other key material considerations, including the *Practice Guidance on Need, Impact and the Sequential Approach* (the '*Practice Guidance*').

AIMS & OBJECTIVES

1.4 In accordance with the Council's main aims and objectives, this updated study provides:

- An assessment of current market shares for convenience and comparison goods, compared to the results of previous studies in order to understand changes over time;
- A quantitative assessment of capacity for new convenience and comparison goods retail floorspace both in terms of baseline population growth and as a result of planned housing growth in the Adopted Core Strategy (CS);
- Advice regarding defining the extent of the Primary Shopping Area and Primary and Secondary Shopping Frontages for the main towns of Dover, Deal and Sandwich, taking into account existing uses, vacancy rates, and other key indicators; and
- Qualitative advice on where any identified need should be accommodated.

1.5 The overall aim of this study is to provide DDC with a robust and deliverable strategy that will provide guidance and advice on how to maximise the potential of the District's main town centres as places to live, work, shop and visit for a range of activities. In turn, this will ensure their long term vitality and viability as attractive, competitive and sustainable locations in accordance with the key objectives of the NPPF.

1.6 In order to address the main aims and objectives of the Council's requirements in a robust and comprehensive manner, the study is informed by a combination of desk-top and primary research. Some of the main research methods include:

- The definition of a **study area** to provide the overall framework for the household telephone interview survey and economic capacity assessment (Appendix 1).
- The commissioning of a **household telephone interview survey (HTIS)**[1] of 800 households to help establish current shopping patterns and preferences across the District and the wider area (Appendix 2).
- Assessment of the existing **retail provision** in the District, including a review of the latest Goad Plans for the main centres of Dover, Deal and Sandwich (Appendix 3).
- A detailed **market share analysis** for convenience (Appendix 4) and comparison goods expenditure (Appendix 5).
- An **economic capacity assessment** for both convenience goods (Appendix 6) and comparison goods (Appendix 7) retail floorspace.

1.7 It is important to state at the outset that, in our experience, capacity forecasts beyond five years should be interpreted with caution. Indeed, in the context of the current economic downturn, even forecasts beyond 2-3 years could be subject to change. We therefore advise the Council that although this updated study does provide the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications, the forecasts should be constantly monitored and updated to take into account any significant changes in 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).

REPORT STRUCTURE

1.8 This report draws together the results of the research and is structured as follows:

- **Section 2.0** reviews the national, regional and local planning policy context material to retail and town centre matters. This provides the framework for this study.
- **Section 3.0** highlights some of the key trends that are driving the dynamic changes in the retail sector and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4.0** defines the study (catchment) area and sets out the market share analysis informed by the updated household telephone interview survey.
- **Section 5.0** describes the key inputs of the economic (capacity) assessment for comparison and convenience goods retailing and sets out projected retail floorspace capacity across the Dover, Deal & Sandwich and elsewhere across the District up to 2031.

[1] Please note that the detailed survey results are not appended to this report. They will be made available by the Council upon request, but there may be a charge for this information. This is at the Council's discretion and will be determined on a case-by-case basis.

- **Section 6.0** draws upon the results of the 2012 household survey to identify specific improvements to Dover, Deal and Sandwich which would encourage residents to visit these centres more often than they currently do.
- Finally, bearing in mind the results of the capacity assessment, **Section 7.0** reviews the extent and mix of uses in Dover, Deal and Sandwich and sets out our review and advice on the definition of Primary Shopping Areas and Primary/Secondary Shopping Frontages.

2.0 PLANNNING POLICY CONTEXT

2.1 This section briefly reviews the planning policy context relating to town centres and retailing in the District and its main centres. It covers the Council's Adopted Core Strategy (CS) and other key material considerations, principally the National Planning Policy Framework (NPPF) published in March 2012.

2.2 In this case the Development Plan for the District consists of the South East Regional Spatial Strategy (2009), Saved Policies of the Local Plan[2] (2002) and the Adopted CS and Development Management Policies (2010).

2.3 The Council is also currently preparing their Land Allocations Document (formerly Site Allocations Development Plan Document) which is anticipated for consultation in late autumn 2012.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.4 The NPPF supersedes all previous national planning policy statements and guidance, including Planning Policy Statement 1 (PPS1): *Delivering Sustainable Development* and PPS4: *Planning for Sustainable Economic Growth* (see Annex 3 to NPPF). It sets out the planning policies for England and how these are expected to be applied. It aims to reinforce the importance of up-to-date plans and strengthen local decision making. The NPPF must therefore be taken into account in the preparation of Local Plans[3] and Neighbourhood Plans[4].

The Presumption in Favour of Sustainable Development

2.5 At the heart of the NPPF is a presumption in favour of sustainable development, which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs. The NPPF sets out the Government's view of what sustainable development means in practice for the planning system. There are *"three dimensions"* – economic, social and environmental – which give rise to the need for the planning system to perform a number of roles. The figure below sets out what this means for plan-making and decision-taking (unless material considerations indicate otherwise) as defined by the NPPF (paragraph 14):

2 The NPPF states that for 12 months from its publication, decision-takers may continue to give full weight to relevant policies adopted since 2004, even if there is a "limited degree of conflict with this Framework" (paragraph 214).

3 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.

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

Figure 2.1 Presumption in Favour of Sustainable Development

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

- local planning authorities should positively seek opportunities to meet the development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted[5].

For **decision-taking** this means[6]:

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

2.6 The Framework 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. All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally"* (paragraph 15).

Core Planning Principles

2.7 Paragraph 17 of the NPPF outlines the 12 core planning principles that underpin both plan-making and decision-taking. These confirm that planning should, *inter alia*:

- be genuinely plan-led, empowering local people to shape their surroundings, with succinct local and neighbourhood plans setting out a positive vision for the future of the area and providing a practical framework within which decisions on planning applications can be made with a high degree of predictability and efficiency;
- not simply be about scrutiny, but instead be a creative exercise in finding ways to enhance and improve the places in which people live their lives;
- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs;

[5] For example, those policies relating to sites protected under the Birds and Habitats Directives (see paragraph 119) and/or designated as Sites of Special Scientific Interest; land designated as Green Belt, Local Green Space, an Area of Outstanding Natural Beauty, Heritage Coast or within a National Park (or the Broads Authority); designated heritage assets; and locations at risk of flooding or coastal erosion.

[6] Unless material considerations indicate otherwise

- always seek to secure high quality design and a good standard of amenity for all existing and future occupants of land and buildings;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value;
- promote mixed use developments, and encourage multiple benefits from the use of land in urban and rural areas, recognising that some open land can perform many functions;
- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable; and
- take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs.

Plan-Making

2.8 The NPPF (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.

2.9 Any additional DPDs should only be used where clearly justified. For example Supplementary Planning Documents (SPDs) should only be used where they can help applicants make successful applications or aid infrastructure delivery, and *"should not be used to add unnecessarily to the financial burdens on development"* (paragraph 153).

2.10 LPAs should seek opportunities to achieve each of the economic, social and environmental dimensions of sustainable development, and net gains across all three. The NPPF states that *"…significant adverse impacts on any of these dimensions should be avoided and, wherever possible, alternative options which reduce or eliminate such impacts should be pursued. Where adverse impacts are unavoidable, measures to mitigate the impact should be considered. Where adequate mitigation measures are not possible, compensatory measures may be appropriate"* (paragraph 152).

2.11 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; 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 to meet the objectives, principles and policies of the Framework;

- 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.

2.12 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.

2.13 For business, LPAs should have a clear understanding of needs within the economic markets operating in and across the area. To achieve this the NPPF states that LPAs should work together with county and neighbouring authorities and with Local Enterprise Partnerships (LEPs) to *"…prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market"* (paragraph 160). They should also work closely with the business community to understand their changing needs and identify and address barriers to investment. The NPPF (paragraph 161) states that LPAs should use this evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments (SHLAA) and should include a reappraisal of the suitability of previously allocated land;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres;
- the capacity of existing centres to accommodate new town centre development;
- locations of deprivation which may benefit from planned remedial action; and
- the needs of the food production industry and any barriers to investment that planning can resolve.

2.14 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).

2.15 The Government expects joint working between local planning authorities on areas of common interest and authorities are under the duty to cooperate. This is important to ensure that strategic priorities across local boundaries are properly co-ordinated and clearly reflected in individual Local Plans (paragraph 179). The NPPF states that joint working should enable LPAs to meet development requirements which cannot wholly be met within their own areas (for example, because of a lack of physical capacity or because to do so would cause significant harm to the principles and policies of the NPPF).

2.16 Neighbourhood planning is covered by paragraphs 183-185 of the NPPF and it gives communities *"…direct power to develop a shared vision for their neighbourhood and deliver the sustainable development they need"* (paragraph 183). Parishes and neighbourhood forums can use neighbourhood planning to set planning policies through neighbourhood plans to determine decisions on planning applications, and grant planning permission through Neighbourhood Development Orders and Community Right to Build Orders for specific development which complies with the order. Neighbourhood plans must be in general conformity with the strategic policies of the Local Plan. To facilitate this, local planning authorities should set out clearly their strategic policies for the area and ensure that an up-to-date Local Plan is in place as quickly as possible. Neighbourhood plans should reflect these policies and should *"…not promote less development than set out in the Local Plan or undermine its strategic policies"* (paragraph 184).

Decision-Taking

2.17 The Framework addresses decision-taking in paragraphs 186-207. It covers pre-application engagement and front loading; determining applications; tailoring planning controls to local circumstances; planning conditions and obligations; and enforcement. In summary the NPPF states that LPAs *should "…approach decision-taking in a positive way to foster the delivery of sustainable development. The relationship between decision-taking and plan-making should be seamless, translating plans into high quality development on the ground"* (paragraph 186). It continues that LPAs should *"…look for solutions rather than problems, and decision-takers at every level should seek to approve applications for sustainable development where possible"* (paragraph 187). LPAs should work proactively with applicants to secure developments that improve the economic, social and environmental conditions of the area.

2.18 The Framework promotes early engagement at the pre-application stage and states that *"…the more issues that can be resolved at pre-application stage, the greater the benefits"* (paragraph 190). LPAs are tasked with encouraging applicants to engage with the local community before submitting their applications. Statutory planning consultees are also tasked to take an early, proactive approach, and provide advice in a timely manner throughout the development process. The NPPF (paragraph 195) also states that applicants and LPAs should consider the potential of entering into planning performance agreements, where this might achieve a faster and more effective application process.

2.19 NPPF (paragraph 203) states that LPAs should consider whether otherwise unacceptable development could be made acceptable through the use of conditions or planning obligations. Planning obligations should only be used where it is not possible to address unacceptable impacts through a planning condition. The NPPF (paragraph 206) states that planning conditions should only be imposed where they are necessary; relevant to planning and to the development to be permitted; enforceable; precise; and reasonable in all other respects.

Delivering Sustainable Development – Ensuring the Vitality of Centres

2.20 The Framework (paragraphs 18-149) sets out 13 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. The following sets out some of the key considerations for plan-making and decision-taking that are material to retail planning and other main town centre uses.

2.21 The NPPF (paragraph 23) states that planning policies should be positive, promote competitive town centre[7] environments and set out policies for the management and growth of centres over the plan period. The figure below sets out what LPAs should take account of when drawing up Local Plans.

Figure 2.2 Planning & Promoting Competitive Town Centres

[7] 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.

In 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[8], based on a clear definition of primary and secondary frontages[9] 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;
- 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. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment 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.

2.22 When considering applications for main town centre uses[10] 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**[11] - this require applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only if suitable sites are not available should out-of-centre sites be considered. 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

[8] 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).

[9] 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.

[10] 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).

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

demonstrate flexibility on issues such as format and scale. The sequential approach does not apply to small scale rural offices or other small scale rural development.

- 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 2,500 sqm). 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
  - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, "*…the impact should also be assessed up to ten years from the time the application is made*".

2.23 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."

SOUTH EAST OF ENGLAND REGIONAL SPATIAL STRATEGY 2009

2.24 Considerable upheaval and confusion was created by the Secretary of State's notification of the revocation of RSSs in July 2010. Following an appeal lodged by CALA Homes, the High Court found in February 2011 that the Secretary of State's actions had been unlawful and effectively reinstated the status of RSSs. However, whilst RSSs remain in force, the Government's stated intention to abolish them is a material consideration and therefore limits the weight which can be attached to RSS policies.

2.25 Notwithstanding this, the South East RSS remains a part of the development plan until such time as they are revoked or replaced. We have therefore reviewed key policies relating and impact on retail and town centres across the District.

2.26 **Policy SP1** designates Dover District as part of the East Kent and Ashford Sub-Region. The Sub-Region also includes Canterbury, Thanet, Shepway, and parts of Swale and Ashford. Across this region, the RSS identifies 22 regional hubs, which are identified as the focus for investment, infrastructure, housing and *"new major retail and employment development"* (paragraph 4.8).

2.27 Dover is designated as a Secondary Regional Centre, one level below the Primary Regional Centre of Canterbury (**Policy TC1**). **Policy TC2** specifies that new growth should first be directed to places identified as Centres for Significant Change, followed by Primary Regional Centres, with less growth expected in Secondary Regional Centres. However, the RSS recognises that Local Authorities will be best place to determine the extent of growth and the balance of centres within their areas.

2.28 Dover gained status as a Growth Point in In July 2008. This is recognised by the RSS, which describes Dover as *"an area for economic growth and regeneration, and housing development"* (paragraph 4.11).

2.29 With respect to housing growth, **Policy EKA3** sets the total number of net additional dwellings required between 2006 and 2026 at 10,100 new dwellings (or 505 dwellings per annum). This level of housing growth has been rolled forward and adopted as part of DDC's CS. With respect to accommodating housing growth, the RSS recognises that not all development can be concentrated within urban areas. As such, the RSS states that there will be a need for a substantial urban extension (paragraph 18.9).

LOCAL DEVELOPMENT PLAN

'Saved' Policies of the Local Plan (2002)

2.30 The District Plan was originally adopted in 2002 and a number of policies were 'saved' by the Secretary of State in September 2007. As such, the weight of 'saved' policies is dependent upon their degree of consistency with the NPPF.

2.31 Some saved policies were not replaced upon adoption of the CS and therefore remain relevant in the context of this study. This is particularly the case with area specific policies for St. James Development, Deal and the expansion of Aylesham, which are summarised below.

2.32 **Saved Policy AS9** allocates the St. James Area in Dover for a mixed use scheme including retail, residential, B1 employment, leisure and tourism uses. The area consists of surface car parks and a number of dated buildings. It is described as a key location within the town centre, between the Castle slopes and the Western heights immediately behind the seafront/harbour.

2.33 Following identification of the area as an opportunity for substantial redevelopment and environmental improvements, the District Council appointed consultants to consider prospects for redevelopment. Following a public consultation, a Development Brief Supplementary Planning Guidance for the area was adopted in July 2002.

2.34 An application for the site was approved in August 2009 for a mix of uses including a supermarket, hotel, and a variety of retail, restaurants and high quality social housing. However, the anchor operator (Asda) retracted their interest in March 2010 and the scheme became obsolete. A revised application was submitted in November 2011 and was approved in June 2012 (planning reference: 11/01056). The most recent scheme will provide circa 10,600 square metres of retail floorspace (of which approximately 30% will be for convenience floorspace) along with 8 residential units and associated car parking. Proposals for a hotel at the south east corner of the site are subject to a separate application.

2.35 In Deal, **Saved Policy SP8** allocates a site at the western edge of the defined centre boundary for approximately 5,700 – 6,400 sqm (gross) retail floorspace, of which 2,600 –

2,900 sqm is for bulky goods. The site is relatively narrow, constrained by Anchor Lane to the north and the Sainsbury's on West Street to the South is occupied by a garage. The Sainsbury's store completed an extension, albeit in a slightly different location than the allocation, and we understand this policy will not be saved.

2.36 Following the 1990 Structure Plan, land outside the village of Aylesham was identified as suitable to accommodate approximately 1,000 new dwellings to help meet Canterbury's housing land requirements. **Saved Policy AY1** of the Local Plan allocates land to accommodate this strategic expansion. The policy allocates land for up to 1,000 new dwellings, circa 4.3 ha of employment land, 2ha for a primary school and circa 0.5ha for food retail. With regard to retail provision, the Local Plan recognised that food retail in Aylesham was limited and, consequently, the area experienced high levels of leakage to Canterbury and Whitfield. In order to redress this situation and provide for the needs of new residents, **Saved Policy AY5** allocates land at Market Place for a new foodstore of circa 1,500 – 2,000 sqm (net). This allocation has not been taken into account in the context of retail capacity as it is unclear whether this allocation will be taken forward in the emerging Land Allocations Document.

2.37 Other 'saved' policies relating to retailing and town centres relate to:

- policy tests for the location of supermarkets and superstores on edge of centre and out of centre sites in Dover (**Saved Policy SP3**), and
- safeguarding A1-A3 ground floor uses in Sandwich Town Centre frontages (**Saved Policy SP9**).

Core Strategy (2010)

2.38 The Core Strategy (CS) was adopted in February 2010 and sets out the vision, objectives, spatial strategy and overarching policies for Dover District.

2.39 The **Spatial Vision** for the District reflects the main characteristics and key drivers for change in Dover District and sets out what kind of area the District will be in 2026 and beyond.

2.40 **Policy CP1** sets out the settlement hierarchy for the District, which the CS specifies should be used to inform decisions on the provision of services (such as retail).

2.41 Consistent with the RSS, Dover is at the top of the hierarchy and is identified as the District's only Secondary Regional Centre. It is defined as the "*major focus for development and concentration of higher order public service facilities in the District*". Please note that the whist the settlement hierarchy specifies that Dover includes the built-up parts of the parishes of River, Temple Ewell and Whitfield, any local retail facilities in these areas are defined as "out of centre" for the purposes of this assessment.

2.42 Deal is designated as the only District Centre in the settlement hierarchy. It is defined as the "secondary focus for development in the District; suitable for urban scale development and should provide a good range of public services and facilities". As above, the settlement hierarchy species that Deal includes the built-up parts of the parishes of Sholden, Walmer and Great Mongeham. However, any local retail facilities in these areas are defined as "out of centre" for the purposes of this assessment.

2.43 The next level of the settlement hierarchy consists of Rural Service Centres (RSC), which are defined the main focus for development in the rural area and "*suitable for a scale of development that would reinforce its role as a provider of services to a wide rural area."* Sandwich is the only RSC identified in the District; however Aylesham is identified as a "proposed" RSC, with full status dependent upon implementation of the plans for expansion set out in Saved Policies AY1 and AY5 of the Local Plan.

2.44 Ash, Capel-le-Ferne, Eastry, Shepherdswell and Wingham are designated as the District's Local Centres and are identified as a secondary focus of development in the rural area. They are defined as being "*suitable for a scale of development that would reinforce its role as a provider of services to its home and adjacent communities*".

2.45 The CS also identifies Villages and Hamlets at the bottom two rungs of the settlement hierarchy. Any shopping facilities in these would be of purely neighbourhood significance and, as a result, these would not be considered centres for the purposes of the NPPF.

2.46 **Figure 2.11** of the CS sets out a portrait of the District and identifies a number of key issues and constraints which will influence the Vision moving forward. Dover Town Centre is identified as "*underperforming and losing ground to other towns.*" The town is perceived as lacking focus, with modernisation and improved connectivity identified as aspirations for the future. Deal Town Centre is "*well liked*", however the CS identifies problems associated with community facilities, few employment opportunities, concerns over accessibility, limited housing choice, flood risk and wildlife habitat constraints. Sandwich Town Centre is described as "*losing its vibrancy*", with the outstanding qualities of the medieval town centre requiring protection. The portrait also recognises Aylesham's "*unrealised potential*" as a rural centre. The CS also notes that, more widely across the District, rural settlements have been losing local facilities and there remains limited local employment and affordable housing provision.

2.47 **Policy CP2** sets out the total amount of land to be allocated for new job-creating development (including retail) based on delivering 10,100 homes by 2026 and 14,000 in the longer term. Between 2006 and 2026, the policy sets out a requirement for identifying land to accommodate 54,000 sqm (gross) of retail floorspace across the District. Of this, 35,000 sqm (gross) is to be accommodated by Strategic Allocations (see paragraph 2.49 below). The remaining 19,000 sqm (gross) is directed to the Deal/Sandwich trade area in order to improve the functioning and retention rate of these centres.

2.48 Table 3.2 of the CS sets out a more detailed breakdown of the type and scale of retail floorspace that should be accommodated by the District's main centres over the Development Plan period. According to the Adopted CS, the Dover area should plan for 35,700 sqm (gross) of new comparison goods floorspace by 2026, with no need identified for additional convenience floorspace. Deal and Sandwich should plan for an additional

2,300 sqm (gross) of convenience floorspace and 16,000 sqm (gross) of comparison. This study will revise and update these figures.

2.49 The CS sets out policies for four strategic allocations which are considered of such scale and significant that they are central to the success of the CS. These are:

- Dover Waterfront
- Mid-Town, Dover
- Former Connaught Barracks, Dover
- Managed expansion of Whitfield, Dover

2.50 Dover Waterfront forms part of the western and seaward gateways to Dover and extends into the town centre. It occupies a key location in Dover and is identified as offering a unique opportunity to create a mixed- use development of sufficient scale, quality and substance to become a major attraction for Dover, strengthening the town centre and creating a continuous commercial area to the seafront. **Policy CP8** allocates this area for a mix of uses, including up to 20,000 sqm (gross) retail floorspace; up to 7,000 sqm of restaurants, cafes and drinking establishments; 15,000 sqm of assembly and leisure uses; as well as offices and a hotel. This strategic allocation has been taken into account in the retail capacity assessment. However, note that the scale and mix of retail floorspace is a working assumption and will be subject to refinement through progression of a masterplan.

2.51 Dover Mid-Town is the most northerly block of Dover Town Centre and is located to the north of the High Street. The site is currently under-utilised however, it has been identified as offering the potential to re-shape, expand and revitalise the town centre to make it more compact and less linear. **Policy CP9** allocates this area for mixed-use development consisting of residential institutions, at least 100 homes, retail/restaurant/drinking establishments of up to 15,000 sqm, non-residential institutions and the redevelopment of K College. The CS does not specify the amount of retail floorspace envisaged for this area. Dover District Council has provided estimates on the scale and mix of floorspace for the purpose of the capacity model. However, note that the scale and mix of retail floorspace is a working assumption and will be subject to refinement through progression of a masterplan.

2.52 Connaught Barracks in Dover is located opposite Dover Castle, overlooking the town. It is surplus to military requirements and was acquired by Homes and Community Agency for redevelopment in 2007. **Policy CP10** allocates this area for predominantly residential development of circa 500 dwellings.

2.53 An area to the west, north and east of Whitfield is identified as a location for major urban expansion. Whitfield was originally a loose settlement of farmsteads and has grown incrementally over the years. As a result, instead of a well-defined centre local shops and community facilities are dispersed throughout the urban area. **Policy CP11** allocates the site for at least 5,750 homes, supported by a range of transport, primary education, primary health and social care, utility services, green infrastructure, and retail, financial and professional offices and eating and drinking establishments. Of note, the Core Strategy recognises that planned growth here must be complementary to Dover town centre rather than in competition, as one of the reasons for seeking population growth in Dover is to help support a range of new and improved facilities in the town centre. The Council adopted the Whitfield Masterplan Supplementary Planning Guidance in April 2011 which provides greater detail on the vision for Whitfield. The quantum of retail development assessed as a commitment as part of the economic capacity assessment is estimated as that contained in Barton Wilmore's 2010 Retail Study which accompanied the planning application for Phase 1a.

Development Management Policies (2010)

2.54 Annex 1 of the Adopted CS sets out more detailed policies to manage and guide new development in the District in accordance with the CS and national policy.

2.55 Policies relevant to retail include:

- **Policy DM22** which safeguards the use of ground floor of premises in Dover and Deal's defined primary shopping frontages for A1, A3 and A4 uses and safeguards the secondary shopping frontages in Dover, Deal and Sandwich for A1, A2, A3, A4 and A5;
- **Policy DM23** which states that proposals for local shops or extensions to local shops will be permitted on developments sites for employment uses within the urban areas and in rural settlements where consistent with the retail hierarchy; and
- **Policy DM24** which seeks to protect local shops and pubs and sets out policy tests for potential changes of use.

Proposals Map

2.56 The Proposals Map for DDC was adopted along with the CS and sets out the extent and location of spatial policies contained in the Saved Policies of the Local Plan and CS. Within Dover and Deal, the proposals map defines the extent of primary and secondary shopping frontages, town centre boundary, the settlement boundary and the location of all site specific policies. For Sandwich, the Proposals Map defines only a secondary shopping frontage and the wider settlement boundary. For Aylesham, and the remaining Local Centres in the District area, only settlement boundaries are defined.

2.57 The appropriateness of the extent of these designations has been reviewed as part of this study.

EMERGING POLICY

2.58 The Council is in the process of preparing a Land Allocations Pre-Submission Local Plan (formerly called the Site Allocations Document). This document will set out site specific policy designations and identify which sites in Dover, Deal, Sandwich and the rural area will be required to deliver the vision set out in the CS.

2.59 The Council consulted on its 'preferred options' of this DPD in 2008 and a 'further call for sites' took place in July 2010. Interim Consultation on further proposed sites took place between October and December 2010. We understand the Council are currently considering the merits of each site and will publish the next version of the DPD for consultation in autumn 2012.

2.60 The conclusions of this study have helped to inform the scale of potential retail designations that have been included in the Land Allocations Local Plan.

SUMMARY

2.61 This section reviewed the national, regional and local policy context relevant to plan-making and the determination of applications for retail and town centre uses. The underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, promoting new development in town centre locations before considering edge- of- centre or out- of- centre sites. This is reinforced by the recently published NPPF.

2.62 Although the Regional Spatial Strategy and Saved Policies of the Local Plan remain a part of the development plan, weight to relevant policies should only be attributed according to their consistency with the NPPF.

2.63 The Adopted Core Strategy sets out a clear settlement hierarchy for the District's centres and should be used to inform decisions on the provision of services (such as retail). Dover (including the urban areas of River, Temple Ewell and Whitfield) is identified as a Secondary Regional Centre and is the "Major focus" for major development. Deal is designated as a District Centre (including the urban areas of Sholden, Walmer and Great Mongeham) and is the "secondary focus" for major development in the District. Sandwich is defined as a Rural Service Centre, with development primarily to "*reinforce its role as a provider of services to a wide rural area*". Aylesham is defined as a "proposed" Rural Service Centre until such time as the proposed expansion is delivered. The District's defined Local Centres serve more local needs.

2.64 The Core Strategy sets out a number of strategic allocations on the adopted Proposals Map of such scale and significance that they are central to the success of the CS. Dover Waterfront is an important site on the edge of the town centre which is envisioned for mixed use development including 20,000 sqm (gross) of retail development. Dover Mid-Town and Connaught Barracks in Dover are identified for mixed-use development, the former to include an element of retail however the quantum is not made explicit. An area to the west, north and east of Whitfield is identified as a location for major urban expansion. The site is allocated for at least 5,750 homes, supported by a range of facilities, however the quantum of retail floorspace has not yet been determined.

2.65 The results of this study have fed into the next stage of the emerging Land Allocations Pre-Submission Local Plan, which will give greater clarification in to the specific sites that will be required to deliver the Core Strategy vision for the District.

3.0 THE CHANGING RETAIL AND URBAN LANDSCAPE

3.1 Britain's urban landscape has altered dramatically since the 1980s. The changes in the location of new retail and leisure development and the dynamic shifts in the nation's shopping and leisure habits have largely been shaped by the complex interaction of policy, economic, social, consumer lifestyle and investment trends. In turn, these trends have had a significant impact on the current and future role of centres, which need to be taken into account when considering future needs, identifying sites and strategies, and assessing the impact of new development. This section summarises some of the key trends that have driven change in the retail sector over the last three decades, and will continue to shape change in the future.

ECONOMIC TRENDS & CONSUMER SPENDING

3.2 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007 has had an equally dramatic impact on household budgets, consumer spending, market demand and, as a result, the level and extent of new development.

3.3 The table below sets out the latest recorded and forecast expenditure per capita growth rates for the main categories of retail spending between 2005 and 2028 prepared by Experian Business Strategies (EBS).

Table 3.1 Growth in UK Retail Spend per Head (% change), 2005 - 2028

	Actual Growth						Forecast Growth				
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014-18	2019-28
Retail Spend	1.7	2.6	1.9	2.0	-1.1	0.3	0.2	0.9	1.6	2.2	2.3
Convenience Goods:	0.1	-0.2	0.4	-1.4	-2.4	0.8	-0.3	-0.4	0.5	0.5	0.6
Comparison Goods	2.7	4.5	2.7	3.9	-0.5	0.1	0.5	1.6	2.1	3.0	3.0

Source: Experian Retail Planner Briefing Note 9 (September 2011) Figures 1a and 1b.

Note: *This forecast excludes special forms of trading and provides an indication of forecast growth from physical outlets only.

3.4 The forecasts show limited growth in retail expenditure per head over the short term. EBS also forecast that per capita growth rates will be lower than historic trends over the longer term for a number of inter-related reasons including, *inter alia*, the increasing maturity of the UK economy and less expansionary consumer credit. As a result, average comparison goods retail spending growth of +3.0% per annum for the period 2012-2027 is significantly lower than growth rates based on historic trends of around +6.0%. For convenience goods the difference between the forecast and historic growth rates is not as marked.

3.5 The retail market therefore remains fragile. Analysts forecast that the retail sector will continue to struggle over the short to medium term. Business and consumer confidence has been weakened by a range of factors including, *inter alia*, the public sector cuts; the rise in VAT; increasing unemployment; and the rising cost of living (including higher energy costs and petrol). This has effectively reduced disposable income and retailers' margins are being squeezed further as the downturn persists.

RETAIL DEVELOPMENT PIPELINE

3.6 The retail development pipeline has slowed dramatically during the economic downturn compared with the shopping centre *"boom"* experienced in the ten years up to 2007. One of the key impacts has been to *"flush out"* some of the more expensive and risky development schemes that were in the pipeline in 2007. 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 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, there is limited new floorspace scheduled to open in 2012 and 2013. As a result, many of Britain's towns that were set to benefit from much needed new retail-led investment and regeneration over the next 5 years may now have to wait several years before confidence and investment returns. Even then, the scale and type of new investment that will emerge in the post-recessionary period could be very different to the last decade of development.

RETAIL OCCUPANCY TRENDS

3.7 In this context, retail operators have also had to adapt their business strategies and store formats to changes in customer requirements, planning legislation and the economic downturn. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations have managed to weather the economic storm.

3.8 The changes in the grocery sector over the last decade in particular illustrate the dynamic changes that have occurred in the competitive retail industry. For example:

- The major food operators have introduced smaller store formats which are capable of being accommodated within town centres, such as the Tesco 'Metro' and Marks and Spencer's 'Simply Food' formats.
- In order to increase market share in the highly competitive grocery sector, several operators have also expanded into smaller convenience stores (e.g. Tesco now has circa 2,000 'Express' stores and Sainsbury's also has its 'Local' format). Similarly, Waitrose and Morrison's are seeking to increase their convenience store offer, and Asda's purchase of Netto has also allowed it to operate from smaller convenience store formats.

- The growth of European '*deep discount'* food operators (such as Aldi and Lidl) has also been dramatic during the last decade. In turn, the established grocery retailers have responded through their own-range 'value' products and price discounts**.**
- The main grocery operators have increased the non-food sale areas of stores, including own-label clothing and electrical goods sales. In some of the larger stores operated by Tesco ('Extra' format) and Asda, a significant proportion of sales area (sometimes up to 60%) is set aside for non-food retailing. This growth in non-food sales responded to the stronger forecast growth in comparison goods expenditure.
- 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.

3.9 Those non-food retailers that experienced significant growth up to 2007 now have to adapt to the very different market conditions. The retailers that are not 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 disappeared from our high streets (e.g. Woolworths, TJ Hughes, Habitat and Jane Norman).

3.10 The 'bulky goods' retail warehouse sector has also not been immune to the impact of the economic downturn. It has experienced a period of significant change and, more recently, instability. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000 sqm gross) in an attempt to dominate market share. However, these same operators are now looking to scale down their stores. Following the acquisition and then subsequent sale of Do It All, Great Mills and Wickes, Focus DIY went into administration in May 2011.

3.11 Within town centres, some high street multiple operators are changing their formats and requirements, and are increasingly seeking larger modern shop units in prime locations. Some traditional high street retailers (e.g. Boots, Next, TK Maxx and Marks & Spencer) have sought this space in large out-of-centre stores which provide the larger floorplates they require to display their full range of products. For example, Mothercare has recently announced plans to close 110 of their town centre stores (representing approximately a quarter of their portfolio) to focus on their out-of-centre market.

TOWN CENTRES

3.12 These changes in retail development and market demand are clearly impacting on the UK's town centres and high streets. Research 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 50-75 centres). This is because they have larger and established catchment areas and represent less risky investments in the current climate. These larger centres have also generally benefitted from recent new shopping centre development over the last decade (e.g. Fremlin Walk in Maidstone) 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.

INTERNET SHOPPING

3.13 New forms of retailing have also emerged in recent years and are becoming established as significant alternatives to more traditional 'bricks and mortar' shopping facilities. Internet shopping has increased its market share of retail sales in certain product categories due to the increased use of personal computers, mobile phones and faster Broadband access. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products on the high street. Although forecasters are still uncertain as to future growth (for example, EBS forecast a plateau in market share by 2018), there does appear to be significant potential for increased market share of convenience and comparison goods retail expenditure. This will have implications for retail capacity forecasts and market demand from retailers for representation in certain types of centres.

FUTURE TRENDS

3.14 Looking ahead, forecasters are uncertain as to when the UK will emerge fully from the economic recession. The economy is forecast to face a period of:

- lower growth in consumer spending;
- reduced bank lending;
- limited access to credit;
- cuts in public sector expenditure; and
- a sluggish housing market.

3.15 Notwithstanding this, forecasters appear to agree that that the economy and retail sector post-recession will be very different to the *"boom"* years of the last decade. This presents significant challenges for all those involved in the retail planning, development and investment.

3.16 The economic downturn is also impacting on the vitality and viability of many of Britain's centres and high streets, through the loss of customers, the number and frequency of shopping trips, and new public/private sector investment. This is placing pressures on rental growth and market demand in many centres outside the *"top 100"* shopping locations, which is further compounded by rising vacancy levels and the loss of key anchor retailers, such as in Dover Town Centre.

3.17 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 could continue to struggle.

3.18 Notwithstanding this reduction in the supply of new retail floorspace, industry experts predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 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, recent 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. prime) and having the right size, format and specification to meet the needs of modern retailers.

3.19 Research by the British Council of Shopping Centres (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.

3.20 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, it is likely that applications for new and extended shopping facilities in out-of-centre locations will continue in the future. Potentially the next phase of out-of-centre investment and development could be a further reinvention and masterplanning of existing out-of-centre locations as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and extended 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. sequential sites) to increase their retail offer.

3.21 In this context, it is clear that the 'top 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 STUDY AREA – DEFINITION & MARKET SHARES

THE STUDY AREA

4.1 The starting point for the retail assessment is to define a realistic and appropriate study (or 'catchment') area. For strategic assessments the study area needs to be drawn sufficiently wide to 'capture' the wider influence of main centres, as well as the more localised catchments of the District's smaller centres and stores.

4.2 The defined study area was agreed with DDC at the outset and is set out in **Appendix 1**. It includes all of the District area, as well as some areas outside the perimeter from where the District's main centres may still influence shopping patterns.

4.3 The study area was divided into eight zones, informed by postcode sector geography. Bearing in mind that postcode sectors can be somewhat arbitrary and are not necessarily an appropriate representation of the catchment areas of different scales and types of retail facilities, the boundaries of several zones (specifically zones 1, 2, 4, 5 and 8) have been amended to take into account natural topography and the perceived catchment areas of different scales and types of centres.

4.4 When drawing the study area and survey zones, we also had regard to the 2007 Retail Needs Assessment Study (RNAS) and 2011 Canterbury City Council Retail and Leisure Study (RLS). Table 4.2 below shows a comparison between the 2012 study area, the previous 2007 RNAS and 2011 RLS. Overall, the 2012 study area is roughly similar to the study area surveyed during previous studies. As a result, it will be possible to broadly compare and contrast changes in shopping patterns over the last 5 years. This will help identify whether centres have experienced a fall in market shares over time. In turn, this will provide valuable baseline evidence for the health checks and economic modelling.

Table 4.2 Comparison of Study Areas

<table>
<tr><th>2007 DDC Retail Study</th><th>2011 Canterbury Retail and Leisure Study</th><th>2012 DDC Retail Study</th></tr>
<tr><td rowspan="2">Zone 29 & Zone 30</td><td rowspan="8">Zone 8 & Zone 9</td><td>Zone 1</td></tr>
<tr><td>Zone 2</td></tr>
<tr><td>Zone 28</td><td>Zone 3</td></tr>
<tr><td>Zone 25</td><td>Zone 4</td></tr>
<tr><td>Zone 24</td><td>Zone 5</td></tr>
<tr><td rowspan="2">Zone 23 & Zone 26</td><td>Zone 6</td></tr>
<tr><td>Zone 7</td></tr>
<tr><td>Zone 27</td><td>Zone 8</td></tr>
</table>

4.5 This study also makes reference to shopping patterns within more geographically constrained "primary catchment areas" (PCA's) of the Districts' main centres. For the purposes of this assessment, we have assumed that Zones 1 & 2 form Dover's PCA, Zones 4 & 5 form the PCA for Deal, and Sandwich's PCA is contiguous with Zone 6. Please note that we do not suggest that PCAs are the only areas which should look to the District's centres for shopping provision. Rather, they form the tightest geographical area surrounding the built up areas of the District's three main centres, which allows us to assess shopping patterns within each built up area more specifically (see **Appendix 1**).

HOUSEHOLD SURVEY

4.6 Strategic Perspectives commissioned *NEMS Market Research* to carry out a household telephone interview survey (HTIS) across the defined study area and zones. The questionnaire was designed by SP, working in partnership with the Council, and is set out in **Appendix 2**[12] along with the survey methodology.

4.7 In total, 800 telephone interviews were conducted in July 2012 across the study area, comprised of 100 surveys in each survey zone. Please note that sample sizes per zone are consistent with good practice and are higher than the total number of responses assessed during the 2007 RNAS (600 interviews across 6 zones) and 2011 Canterbury RLS (200 surveys across 2 zones).

4.8 A number of measures were put in place by NEMS to ensure each sample is representative of the profile of the person responsible for main food / shopping in the household. These are also detailed in **Appendix 2**.

4.9 Responses across the study area were weighted by zone population to ensure that the results of respondents in more sparsely or heavily populated zones were not under or over represented in terms of the market share assessment. This is a standard approach and helps to ensure the survey results provide a robust and realistic picture of shopping patterns for different types of food and non-food purchases.

MARKET SHARE ANALYSIS

4.10 The survey results detailing shopping patterns and preferences for different types of convenience and comparison goods shopping are used to inform the market share analysis for the main study centres, foodstores and retail warehouses at the base year[13]. These market shares provide a key input to the retail capacity assessment.

4.11 Please note that the market share assessment and capacity study adopts a strict interpretation of the NPPF definition of whether retail destinations are considered "in", "edge" or "out" of centre (NPPF, Annex 2: Glossary). Within Dover and Deal "in centre"

[12] The detailed household survey results and tabulations are not appended to this report, but can be obtained by the Council upon request. Please note that there may be a cost for purchasing the full survey results.

[13] Please note that the survey results were re-weighted by NEMS to filter out negative responses (such as by people who did not remember where they shopped for a particular type of good).

facilities are those located within the defined Town Centre boundary, and "edge of centre" development is located within 300m of the adopted primary shopping frontage. In Sandwich, with the absence of a town centre boundary, "in centre" has been taken as any facilities located within the adopted Secondary Shopping Frontage. "Out of centre" development is that which is located more than 300m of the defined primary shopping frontage, and includes local facilities within the built-out areas of Dover and Deal (such as in Temple Ewell, Whitfield and Walmer). No town centres are defined for Aylesham, the defined Local Centres or other smaller settlements.

Internet

4.12 It is common practice in retail assessments to deduct SFT from the average expenditure per capita figures at the outset according to national forecasts derived from Experian Business Strategies (see Section 5.0). Special Forms of Trading (i.e. purchases over the Internet, mail order shopping and market stalls) have therefore been filtered out before undertaking the market share assessment.

4.13 Experian Business Strategies (EBS) estimate that special forms of trading account for 4.6% of all expenditure on convenience goods in 2012. To be robust, we have compared this against the results of the 2012 HTIS, which shows that the weighted average of all internet spending across main, secondary and local top-up shopping purchases equated to roughly 3.7% of combined convenience goods expenditure. This is consistent with the level of SFT found during the course of the 2007 RNAS. Notwithstanding this, to be robust and in accordance with good practice we have applied EBS forecasts for convenience goods SFT up to 2031 consistent with Experian's latest Retail Planning Briefing Note (No. 9).

4.14 EBS estimates that SFT account for 8.8% of all expenditure on comparison goods in 2012. After applying an appropriate weighting to take into account the distribution and weight of spend by respondents across different comparison goods expenditure categories, the results of the 2012 HTIS indicate that approximately 7.1% of all comparison goods expenditure across the study area can be attributed to SFT. Although slightly lower than EBS forecasts, to be robust and consistent with good practice we have applied EBS forecasts for comparison goods expenditure on SFT up to 2031 consistent with their latest Retail Planning Briefing Note (No. 9).

Convenience Goods

4.15 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 housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

4.16 To assess current shopping patterns, the household survey comprised standard questions on:

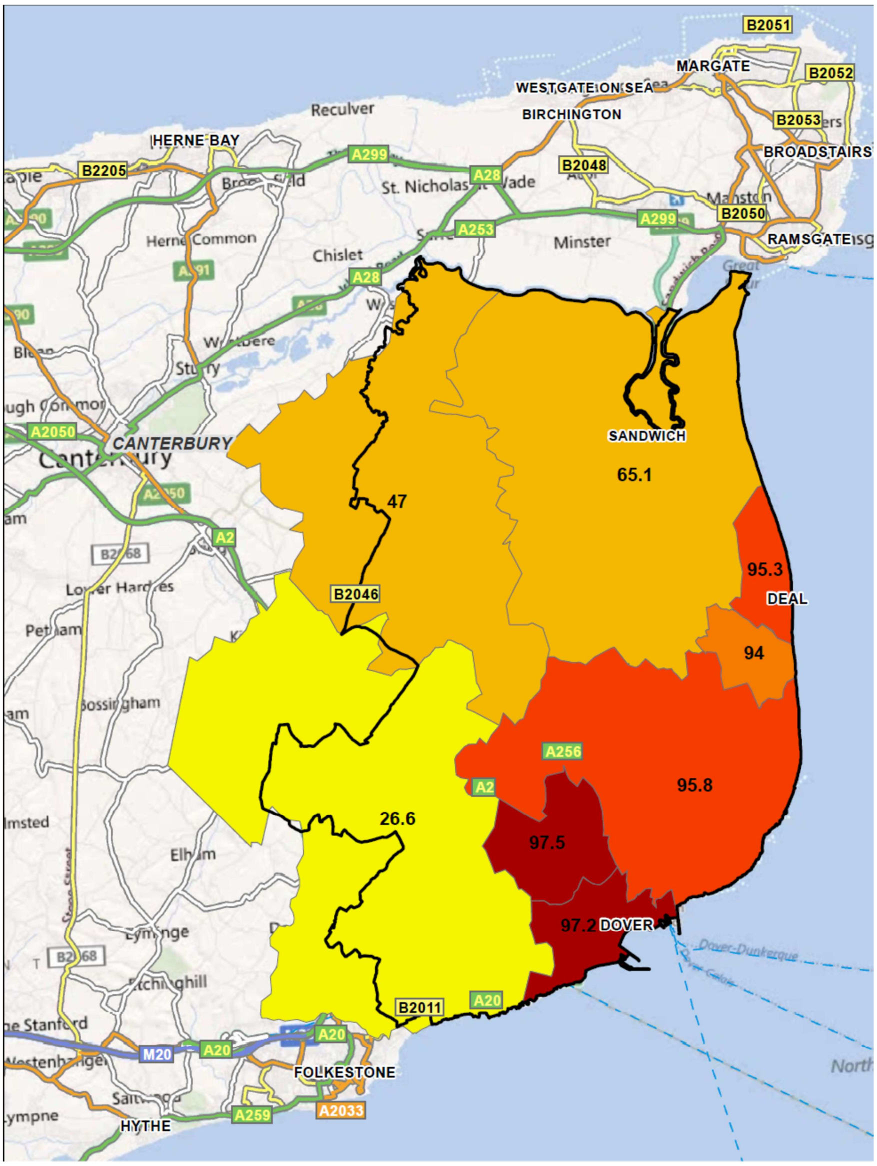
- where households *"normally"* carry out their main 'bulk' (trolley) food purchases (*question 1*), the main reason they visit a particular store (*question 2*), how they normally travel there (*question 3*), and how often (*question 4*);
- whether households also regularly visited any other stores for main 'bulk' convenience goods purchases (*question 5*) and how often (*question 6*);
- where households carry out more frequent 'top up' (basket) purchases (*question 7*);
- whether households also purchased comparison goods in-store as part of their overall food shopping trip (*question 8*) and, if so, where (*question 9)*; and
- what proportion of their last main food shop was spent on non-food goods (*question 10*).

4.17 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. In this case we have assumed a standard weighting of 65% for main 'bulk' shopping, 10% for secondary main 'bulk' shopping and 25% for top-up shopping. This weighting produces a composite pattern of convenience goods spending and this is what constitutes convenience goods market shares and expenditure throughout the remainder of this study.

4.18 The overall market share analysis for convenience goods provides the framework for the economic capacity assessment and is set out in Table 1 of **Appendix 4**.

4.19 Figure 4.3 below depicts the market share of all convenience goods expenditure which is captured by stores and facilities within the District (called 'retention') across each of the survey zones.

Figure 4.3 Retention of Convenience Goods Shopping within the District (%)



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4.20 Some of the key headline results identified by the market share analysis are as follows:

- Overall, the District's centres and foodstores are retaining a high proportion of convenience goods expenditure from residents in the study area (76.3%). Looking more specifically at the primary catchment areas of the District's main centres, both Dover (Zones 1 & 2) and Deal (Zones 4 & 5) are achieving very high retention rates of 94.7% each. Sandwich's PCA (Zone 6) is achieving a lower District wide retention rate of 65.1%.

- The District's "in centre" foodstores are achieving a total market share of 13.4% across the study area. This is lower than the market share achieved by edge of centre stores (15.4%) and significantly smaller than the amount of trade retained by out of centre stores (47.5%).

- Within Dover's PCA, "in centre" foodstores achieve 9% of total market share, of which the majority (4.3%) is attributed to the M&S on Biggin Street. There is only one edge of centre foodstore (Iceland on the High Street) which achieves a market share of 2.1%. The majority of convenience market share is attributed to out of centre foodstores, of which the most popular destinations are the Tesco Extra in White Cliffs Business Park (36.3%), followed by the Morrison's on Bridge Street (36%).
- Within Deal's PCA, "in centre" foodstores achieve 22.1% market share. This is attributed to the Co-Op on Park Street (7.2%), Iceland on Queen Street (5.0%), and M&S on High Street (5.5%) and other smaller stores (4.4%). The Sainsbury's on West Street is the only edge of centre store and achieves a 47.1% market share within Zones 4 & 5. The retention of out of centre facilities is significantly lower than in Dover's PCA, and together achieve a market share of approximately 25%. The most popular out of centre destination is Tesco Extra at White Cliffs Business Park (11.8%).
- Within Sandwich's PCA, "in centre" foodstores achieve 12% market share. Of this, less than half (5.6%) is attributed to stores in Sandwich, with the remainder directed to Deal (2.3%) and other local centres within the District (4.1%). Edge of centre foodstores account for 35.2% of all convenience goods provision, of which 23.1% is attributed to the Co-Op on Moat Sole Road and the remainder (12.1%) to the Sainsbury's on West Street in Deal. Out of centre stores account for 18% of total convenience trade. This is mostly attributed for by the Tesco Extra in White Cliffs Business Park (12.3%). The most popular food shopping destinations outside of the District are Westwood Cross (13.6%) and Canterbury (10.7%). With respect to the latter, cross tabulations of the results of the HTIS show that, of those who use Canterbury for their main food shopping, 40% normally combine their trip with other activities, of which the most popular activity is non-food shopping (11%). Due to the relatively wide geographic extent of Zone 6 and the proximity and relative attraction of adjacent facilities and higher order facilities, it is reasonable to expect that an element of expenditure will "leak" outside of the District. However, there does appear to be qualitative arguments for enhancing food store provision within Sandwich to claw back some of this leakage.
- Approximately 47.0% of convenience goods expenditure in Zone 7 and 26.6% in Zone 8 is captured by stores in Dover District. This is considered reasonable bearing in mind their location on the periphery of the District's main centres and the relative proximity to Folkestone and Canterbury.
- In total, the District's out-of-centre stores account for 44.5% of total convenience goods spend across the study area as a whole. Tesco at White Cliffs Business Park in Dover appears to dominate trade, accounting for between 6.9% and 48.6% of expenditure in each zone, and 22.7% of total convenience expend across the study area as a whole. The Morrison's on Bridge Street in Dover also has a high share of total convenience spend (14.7%), however it appears to draw less from zones outside of the Dover PCA (specifically Zones 4 – 8) than the Tesco Extra.

- The District's Local Centres have a more modest convenience market share in the study area. All centres achieve their highest market share in the zone within which they are located, which reflects the relative scale of the convenience goods floorspace in these smaller centres and their primary roles as meeting the more frequent day-to-day shopping needs of their local catchment populations.

Comparison Goods

4.21 Comparison 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**). For the purpose of our assessment comparison goods and non-food shopping have the same meaning.

4.22 The household survey comprised questions on the following main non-food expenditure categories, as defined by Experian Business Strategies (also see **Appendix 2**):

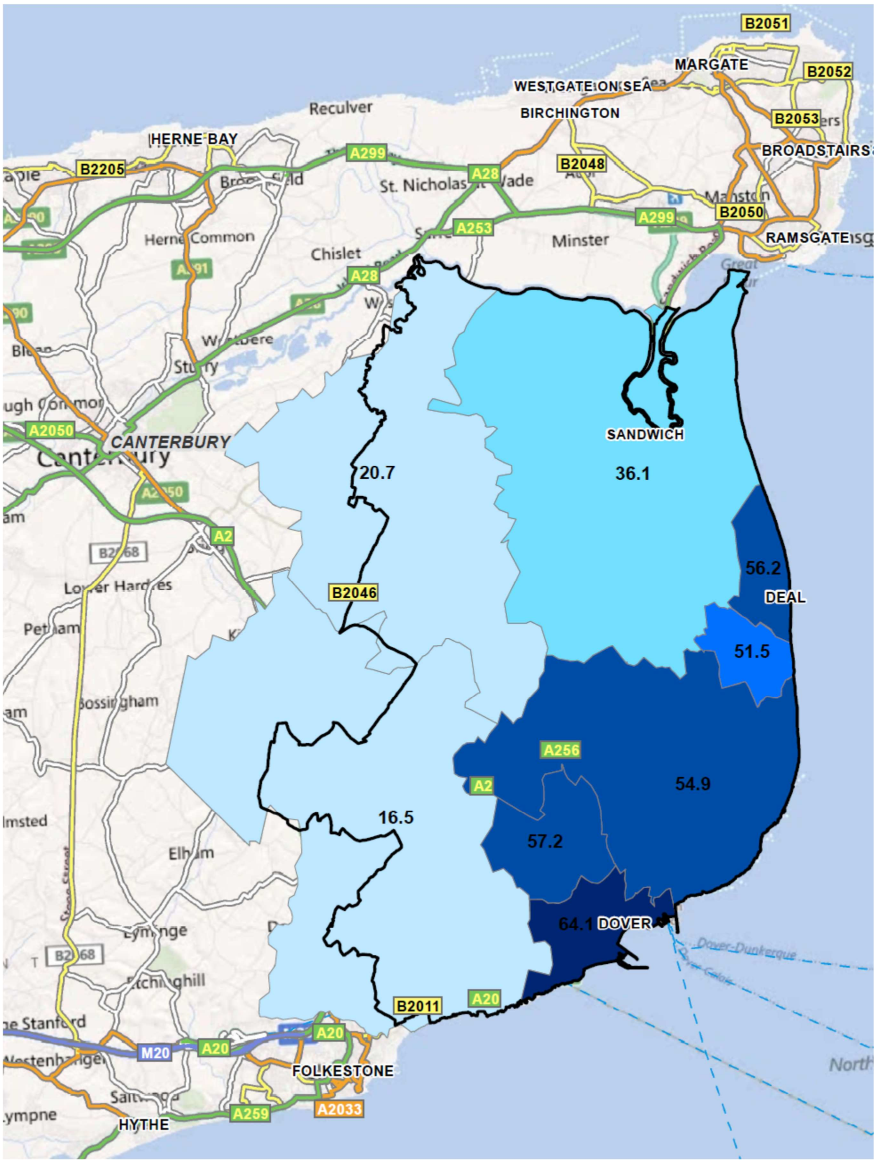
- 'clothing and footwear' (*question 11*);
- 'furniture, carpets and floor coverings' (*question 12*);
- 'textiles, curtains, soft furnishings, etc.' *(question 13)*;
- 'DIY goods, hardware, decorating supplies, etc.' (*question 14*);
- 'Gardens, plants and flowers' *(question 15)*;
- 'large domestic appliances' (e.g. fridges, washing machines, etc.) *(question 16);*
- 'small domestic appliances' (e.g. kettles, irons, knives, etc.) *(question 17)*;
- 'audio-visual, photographic and computer equipment' (such as radio, TV, Hi-Fi, telephones, photographic and computer goods) (*question 18*);
- 'CDs, DVDs, etc.' (but excluding video and computer games) *(question 19)*;
- 'personal use and care' (including medical and pharmaceutical products) *(question 20);*
- 'games, toys, hobbies, sports, camping and musical instruments' *(question 21)*;
- 'pets and pet related products' *(question 22)*; and
- 'all other non-food goods' (*question 23)*.

4.23 The retail capacity assessment draws on the overall market share analysis for all comparison goods shopping (see Table 1, **Appendix 4**). This has been derived by applying the market shares for the different categories of comparison goods to the comparable average per capita expenditure levels by goods type within each study zone (see Tables 2-14, **Appendix 4**).

4.24 This is an accepted approach as it provides a more accurate assessment of the distribution and weight of spend by respondents across each zone. The more detailed expenditure category approach means that the resultant market shares for centres and stores are not skewed by any particular comparison goods expenditure category. As a result, the analysis provides a more robust picture of overall shopping patterns for comparison goods.

4.25 Figure 4.4 below depicts the market share of all comparison goods expenditure which is captured by stores and facilities within the District ('retention') across each of the survey zones.

Figure 4.4 Retention of Comparison Goods Shopping within the District (%)

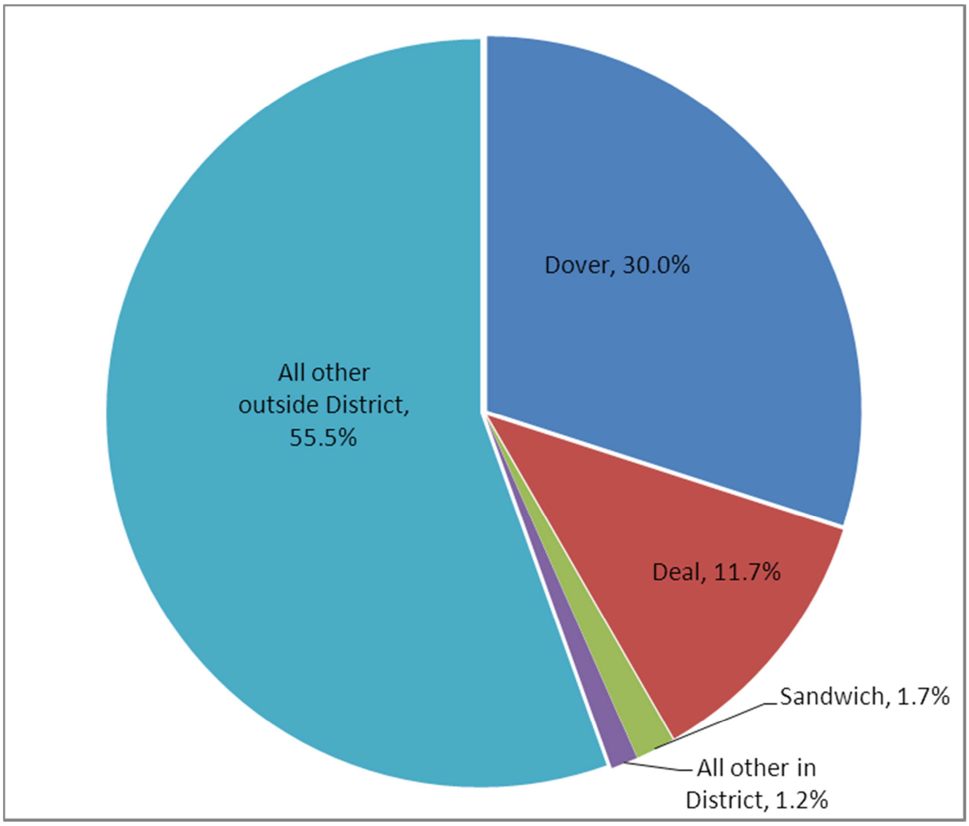


4.26 The key headline results for the study area as a whole (i.e. Zones 1-8) as set out in Table 1 (**Appendix 4**) are as follows:

- The District's main centres and stores are achieving a total of 44.5% of all comparison goods shopping expenditure across the study area.

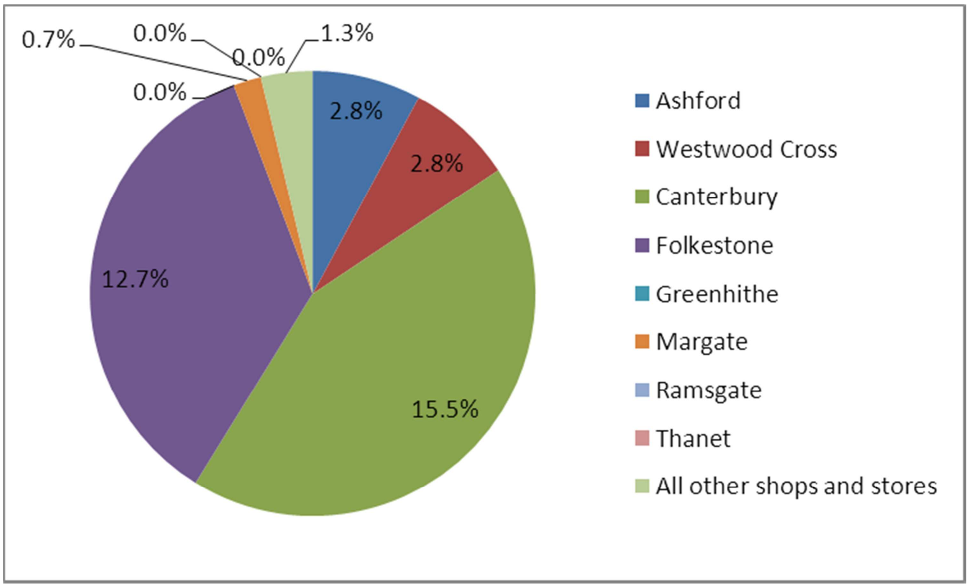
- Stores and facilities located "in" the District's centres together account for 29% of total comparison goods expenditure. "Edge" of centre stores facilities are limited to the Charlton Centre (which for the purposes of this assessment we have taken to include standalone stores at Charlton Green) and De Bradelei Wharf Designer Outlet. Together these account for circa 1% of total comparison goods trade within the study area. The District's out-of-centre shopping facilities (i.e. retail warehouses and the non-food sales areas in superstores) are achieving a market share of 14.4% across the study area. The retention rate for comparison goods shopping is higher in the zones within which major out-of-centre provision is located (Zones 1-4), indicating that they do play a role in retaining expenditure locally.
- Centres and stores outside Zones 1-8 account for 55.5% of comparison goods shopping trips from within the entire study area (see Figure 4.5). Figure 4.6 below shows the main destinations outside of the District, which are Canterbury (27.2%), Westwood Cross (12.4%) and Folkestone (10.4%).

Figure 4.5 Market Share of All Comparison Goods Expenditure Across All of Study Area (Zones 1-8)



Source: Table 1, Appendix 5.

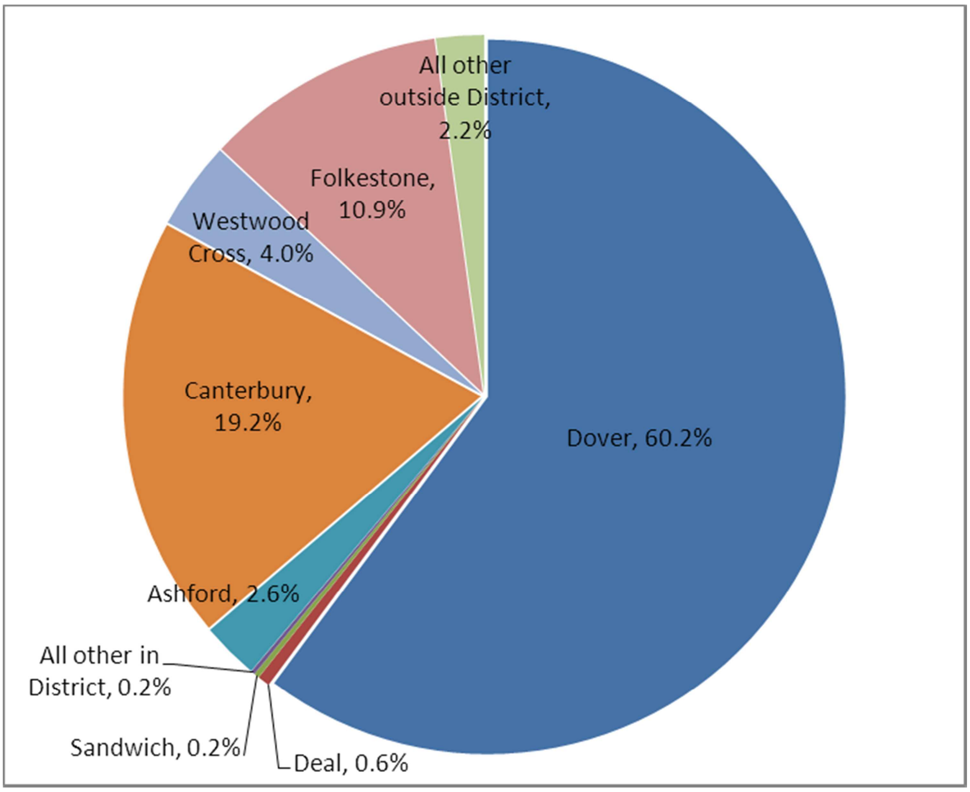
Figure 4.6 Share of Comparison Goods Shopping in Outside of District Destinations Across All of Study Area



Source: Appendix 5, Table 1.

4.27 Looking specifically at shopping patterns within Dover's PC (Zones 1 & 2), Figure 4.7 below depicts the main destinations for comparison goods shopping.

Figure 4.7 Market Share of All Comparison Goods Expenditure Across Dover's PCA (Zones 1 & 2)



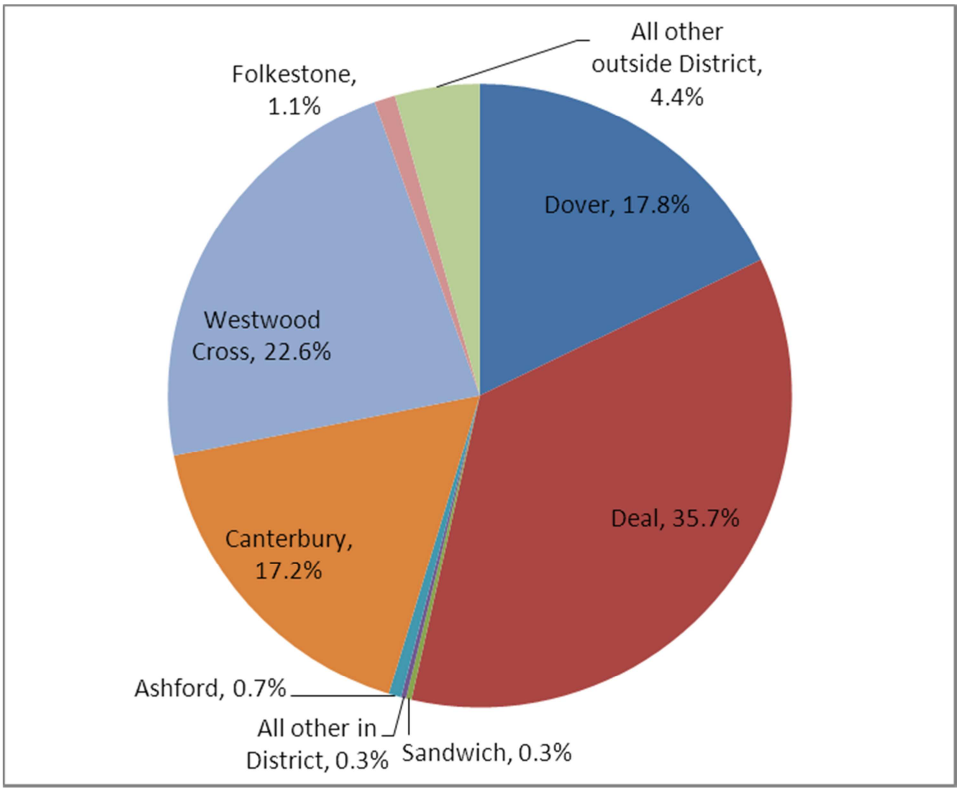
Source: Appendix 5, Table 1.

4.28 The result of the market share analysis of respondents within Dover's PCA shows that:

- 61.2% of all comparison goods expenditure is retained within centres and stores within the District. The most popular destinations outside of Zones 1-8 are Canterbury (19.2%) and Folkestone (10.9%). There is a notable increase in the market share of Canterbury between Zones 1 (15.5%) and Zone 2 (24.3%), demonstrating the broad sphere of Canterbury's influence on the District.
- "In centre" stores within Dover achieve a 37.4% share of total comparison goods shopping trips from Zones 1 & 2. In Zone 1, these stores achieve a market share of 42.8%, whereas they achieve a market share of only 30% from Zone 2. "In centre" stores achieve 16.6% market share from Zone 3 and between 3.7% - 6.8% from the other study zones.
- Edge of centre stores in Dover are limited to the Charlton Centre (which, for the purpose of this assessment, also includes standalone retail warehouses at Charlton Green) and de Bradelei Wharf Designer Outlets. Together they achieve a combined 2.3% of comparison expenditure within Zones 1 and 2. Across the study area, they account for circa 1% of total comparison goods expenditure.
- Out of centre stores in Dover account for 20.5% of total comparison goods shopping in Zones 1 & 2 and between 7.7% and 17.7% in the other survey zones.

4.29 Looking specifically at shopping patterns within Deal's PCA (Zones 4 & 5), Figure 4.8 depicts the main destinations for comparison goods shopping.

Figure 4.8 Market Share of All Comparison Goods Expenditure Across Deal's PCA (Zones 4 & 5)



Source: Appendix 4, Table 1.

4.30 The result of the market share analysis for respondents in Deal's PCA shows that:

- 54.1% of comparison goods expenditure from Deal's PCA is retained within the District's centres and stores. The most popular destinations outside of Zones 1-8 are Westwood Cross (22.6%) and Canterbury 17.2%).
- Stores in Deal District Centre account for 32.7% of all comparison goods expenditure within Deal's PCA (Zones 4 & 5). It also achieves a reasonable market share from Zone 3 (15.7%) and Zone 6 (9.4%). Out of centre stores in Deal are limited, and have a market share of approximately 3% in Deal's PCA. Out of centre stores in Dover account for 11.5% of total comparison goods market share.

4.31 Outside of the two main centres of Dover and Deal, the more detailed market share analysis shows that:

- Within Sandwich's PCA, approximately 43.7% of all comparison goods expenditure is retained within the District. Sandwich itself has a very limited role in comparison goods shopping. It accounts for 11.6% of total comparison expenditure within its PCA (Zone 6) and less than 2% in all other zones. Circa 10% of all comparison goods expenditure within Zone 6 goes to Deal District Centre. The majority of leakage is attributed to Westwood Cross (31.1%) and Canterbury (23.8%).
- District wide retention rates in Zone 7 (30.7%) and Zone 8 (24.3%) are lower; however they are considered reasonable bearing in mind the attraction and relative proximity of Canterbury, Folkestone and Westwood Cross.

4.32 Tables 2-14 (**Appendix 5**) set out the more detailed shopping patterns for the different types of comparison goods expenditure categories that make up the overall market share analysis. To help illustrate some of the key trends and shopper preferences, the table below summarises the market shares and retention levels for selected comparison goods categories across the study area. To give some context, the table also lists the total amount (in £m) of expenditure retained in the District. Please note that figures for Dover and Deal incorporate both in, edge and out of centre provision.

Table 4.3 2012 Study Area - Market Share Analysis (%)

	Clothing & Footwear	Furniture, Carpets, etc.	Textiles, Soft Furnishings, etc.	DIY, Hardware, etc.	Large Domestic Appliances	Audio Visual	Goods for personal use

Dover Sub Regional Centre	14.8%	18.6%	14.5%	65.0%	18.5%	21.1%	40.3%
Deal District Centre	7.7%	9.8%	2.4%	5.9%	10.2%	5.7%	25.3%
Sandwich RSC	0.5%	2.4%	1.0%	1.3%	0.3%	0.6%	3.7%
All other in District	0.0%	0.2%	0.0%	0.1%	2.4%	0.0%	4.7%
RETENTION LEVEL:	**23.0%** **£16m**	**31.0%** **£8m**	**17.8%** **£2m**	**72.2%** **£19m**	**31.5%** **£3m**	**27.4%** **£8m**	**74.0%** **£37m**
Canterbury	42.1%	45.9%	52.0%	11.3%	23.5%	28.2%	11.3%
Westwood Cross	17.1%	10.1%	17.2%	3.9%	17.1%	17.3%	3.4%
Folkestone	9.9%	7.4%	7.9%	9.6%	23.5%	20.8%	9.1%
All Other Centres/Stores Outside District:	7.9%	5.6%	5.1%	3.0%	4.4%	6.3%	2.2%
TOTAL MARKET SHARE:	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Appendix 5, Tables 2-14.

4.33 Table 4.3 shows that there is a relatively wide variance in District wide retention rates across specific comparison goods subcategories. Dover achieves the highest market share of all destinations within the District, which is reflective of its status at the top of the retail hierarchy. Looking more specifically at where this expenditure is directed, Tables 4-12 show that stores and facilities "in centre" account for the majority of market shares across most comparison goods sub-categories, with exception of DIY, Gardening, CDs and DVDs, which are dominated by out of centre stores.

4.34 Across the District there is a relatively high leakage of audio-visual, games and clothing expenditure, which can be accounted for by the proximity and relative attraction of facilities at Westwood Cross, Canterbury and Folkestone.

CHANGES IN MARKET SHARES OVER TIME

4.35 Table 4.4 compares the results of the results of the 2012 HTIS market share analysis to the results of the previous District-wide retail study (RNAS 2007) and Canterbury's 2011 Retail and Leisure Study (RLS).

Table 4.4 Comparison of Results of 2012 HTIS Market Share Analysis

		DDC RNAS 2007		Canterbury RLS 2011		DDC Retail Study 2012	
	Retail goods category	Retention within DDC	Leakage out of DDC	Retention within DDC	Leakage out of DDC	Retention within DDC	Leakage out of DDC
Convenience	Main Food			68.0%	32.0%	74.5%	25.5%
	Top-Up			60.6%	39.4%	84.5%	15.5%
	Total Convenience	**73.7%**	**26.3%**			**76.3%**	**23.7%**
Comparison	Clothing and Footwear			19.5%	80.5%	23.0%	77.0%
	Furniture, and Floor Coverings			16.8%	83.2%	31.0%	69.0%
	Textiles and Soft Furnishings			12.5%	87.5%	17.8%	82.2%
	Hardware, DIY and Gardening*			56.7%	43.3%	71.7%	28.3%
	Domestic appliances *			19.5%	80.5%	34.0%	66.0%
	Audio-Visual*			16.5%	83.5%	32.1%	67.9%
	Personal Use			61.3%	38.7%	74.0%	26.0%
	All other non-food goods*			25.3%	74.7%	49.3%	50.7%
	Total Comparison	**38.2%**	**61.8%**			**44.5%**	**55.5%**

Source: DDC Retail Need Assessment Study (December 2007), Canterbury City Council Retail and Leisure Study (January 2011) and Appendices 3 & 4 of present study. * denotes categories which are comprised of a combination of two or more sub-categories used in the 2012 HTIS.

4.36 When interpreting potential changes in market share over time, it must be noted that the areas assessed during the 2007 RNAS and Canterbury's 2011 RLS followed the District boundary exactly and were therefore slightly smaller than the area assessed here. It has also not been possible to directly compare changes in specific sub-categories of goods due to differences in data collection and reporting.

4.37 Notwithstanding this, the table above indicates that there has been an overall increase in the total District wide retention rate for both convenience goods (growing from 73.7% in 2007 to 76.3% in 2012) and comparison goods (growing from 38.2% in 2007 to 44.5% in 2012).

4.38 This apparent improvement in District wide retention rates is particularly striking bearing in mind that the study area assessed as part of the present study is slightly larger than that which was assessed during either the 2007 or 2011 studies. This may be partially due to the implementation and opening of new retail facilities in the District (such as B&Q).

SUMMARY

4.39 In summary, the survey evidence shows that the District's main centres and stores are retaining a high proportion (76.3%) of convenience goods shopping trips and expenditure across the study area. There is a particularly high retention rate in the PCA's of Dover (94.7%) and Deal (94.7%). Sandwich retains slightly less convenience goods expenditure (65.1%), which can be partially accounted for by the attraction of convenience (and comparison goods) shopping in Westwood Cross, Canterbury and Folkestone. There is also a reasonable district wide retention rate in Zone 7 (47.0%) and Zone 8 (26.6%) bearing in mind the attraction and proximity of facilities outside of the District. Compared to the results of the 2007 RNAS, the 2012 market share assessment shows that the overall retention of convenience goods shopping in the District has increased from 73.7% in 2007 to 76.3% in 2012.

4.40 The 2012 market share assessment shows that 44.5%. of all comparison goods expenditure is retained by stores and centres within the District. This is an improvement from the 38.2% retention recorded in 2007.

4.41 Looking specifically at the sub-categories of comparison goods expenditure, district-wide retention rates (as a %) are highest in Goods for Personal Use and DIY & Gardening. Retention is lowest in Audio-visual goods (72.5%), Clothing & Footwear (77%) and Soft Furnishings (82%), which could be attributed to the provision of competing facilities outside the District as well as potential gaps in provision inside the District.

4.42 Within Dover's PCA, "in centre" shops and facilities attract the majority of comparison goods expenditure across different categories of comparison goods expenditure. In centre destinations also attract a reasonable share of all comparison goods expenditure across all other zones in the study area (ranging from 3.7% in Zone 6 to 16.6% in Zone 3). Out of centre destinations in Dover account for 13.4% of all comparison goods expenditure across the study area. Out of centre stores only achieve a higher market share than the town centre in the sub-categories of DIY, gardening and CDs/DVDs (the latter presumably accounted for by the Tesco Extra).

4.43 Deal and Sandwich centres account for 11.6% and 1.7% of total comparison goods respectively across the study area as a whole. The retention rate of in and out of centre stores in Deal is higher (35.7%) in Deal's PCA (Zones 4 & 5). Sandwich Rural Service Centre has a limited role in retaining comparison goods expenditure, and accounts for less than 2% of all comparison goods expenditure across the study area. This is consistent with its role within the retail hierarchy.

4.44 Overall, comparison goods expenditure attracted to centres and stores outside of the District (leakage) is mostly captured by Canterbury (27.2%), Westwood Cross (12.4%)

and Folkestone (10.4%). As expected, leakage is higher around the periphery of the study are (particularly in Zones 6-8) and lowest in Zone 1.

4.45 Whilst the District's smaller centres have a much more limited draw for both main food and comparison goods shopping, they are important destinations for more frequent top-up food shopping and meeting the day-to-day needs of their local catchment populations.

5.0 ECONOMIC CAPACITY ASSESSMENT

5.1 This section sets out the assessment of the quantitative need (retail capacity) for new comparison and convenience goods floorspace in the District area over the development plan period, between 2012 (the 'base year') and 2027 (the 'design year'), as well as up to 2031. This assessment supersedes the previous retail capacity forecasts prepared for the Council.

5.2 The 'baseline' capacity is based on the latest expenditure and population projections provided by Experian Business Strategies (EBS) for the study area and each sub-zone (i.e. Zones 1-8). The economic tabulations detailing the convenience and comparison goods capacity forecasts are set out in **Appendix 6** and **Appendix 7** respectively.

THE CREAT*E* CAPACITY MODEL

5.3 The **CREAT**^{e} economic model has been developed by Strategic Perspectives over a number of years to specifically assess the capacity for and impact of new retail floorspace. The Excel-spread sheet based model draws on the advice set out in the NPPF and *Practice Guidance*. It adopts a transparent step-by-step approach in which all the key assumptions and forecasts can be easily tested and interrogated. In simple terms the economic capacity approach is based on the following key assumptions and forecasts:

- The definition of a realistic study (catchment) area (see Section 4.0).
- Average convenience and comparison goods expenditure per capita levels for the eight study zones are derived from the *'Area Profile Reports'* ('APRs') produced by Experian Business Strategies ('EBS'). All expenditure and turnover figures are expressed in 2010 prices.
- The base year population has been derived from the EBS *'Area Profile Reports'* ('APRs'). Projections up to 2031 have been taken from data provided by Kent County Council.
- The forecasts of annual growth in convenience and comparison goods expenditure per capita levels are informed by the most recent expenditure forecasts published by EBS in *'Retail Planner Briefing Note 9'* (September 2011).
- As described earlier, we have made an allowance for Special Forms of Trading ('SFT') at the base year and for growth over the forecast period based on the latest forecasts published by EBS in *'Retail Planner Briefing Note 9'* (September 2011).
- The assessment of the 'potential' (or 'current') turnovers of all retail floorspace in the District area at 2012 is based on the allocation of available expenditure in the study area to existing centres/stores based on the survey-derived market share analysis for each zone (see Section 4.0), and judgements as to the likely trade draw of certain centres/stores from outside the study area;

- The growth in the 'potential' turnover of existing centres and stores over the study period (i.e. 2017, 2022, 2026, 2027 and 2031), which is based on a constant market share approach.
- The assessment of the 'benchmark' turnovers for existing centres/stores in 2012 is based, where possible, on the company average sales densities (or 'turnover to floorspace ratios' - £ per square metre) of specific retailers published by Mintel and Verdict Research. This assessment is informed by other evidence, including centre/store health checks and previous retail studies. Where not available, convenience goods retailers are estimated to be operating at 'benchmark' levels.
- The growth in 'benchmark' turnovers over the study period allows for the growth in the 'productivity' (or 'efficiency') of existing floorspace in accordance with national policy and the advice set out in the 'Practice Guidance'. This reflects the ability of retailers to absorb increases in their costs by increasing their average sales densities[14].

5.4 Capacity arises from the relationship and differences between expenditure and turnover growth. In simple terms, if existing centres/stores are trading in line with appropriate 'benchmark' levels at the base year, a comparison between 'potential' and forecast turnover levels will provide a broad indication of the expenditure 'surplus' or capacity over the forecast period. A 'surplus' capacity generally points to an under-provision of retail facilities within a centre and/or study area (which, all things being equal, would suggest a quantitative need for new floorspace), whereas a deficit would suggest an over-provision of retail facilities.

5.5 For convenience goods, our capacity approach takes into account the relative trading performance of the District's different centres and stores in 2012 based on comparisons between the survey-derived 'potential' turnover estimates and 'benchmark' sales levels based on published research and other evidence. However, this is a more difficult exercise for comparison goods capacity assessments, as there is limited published floorspace and 'benchmark' turnover data available for comparison goods floorspace.

5.6 Furthermore, forecasts over a long period of time are inherently less certain, due to economic uncertainties and the potential for changes in some of the key assumptions (such as, for example, stronger growth in internet shopping that currently forecast).

5.7 As a result, we advise at the outset that the capacity forecasts should be treated with caution. They are intended to provide an indication of the potential need for new retail floorspace to help inform plan-making and potential future site allocations, and should not be treated as 'maximum' or 'minimum' thresholds (or hard 'targets') that have to be met.

14 For convenience and comparison goods retailing we have identified appropriate annual 'productivity' growth rates that are compatible with the annual expenditure per capita growth forecasts. 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 scale, quality and type of their retail floorspace).

5.8 In this context, the following provides a summary of the key baseline assumptions and forecasts underpinning the retail capacity assessment for convenience and comparison goods retailing.

POPULATION AND EXPENDITURE ESTIMATES

Study Area Population

5.9 Table 1 (Appendices 6 & 7) sets out the base year population for each study area zone and the projections to 2026 and 2031, based on the outputs of the Experian *Area Profile Reports* and Kent County Council population projections. The total study area population of 121,049 in 2012 is projected to increase to 135, 672 by 2026 and to 141, 380 by 2026 (+16.1%).

5.10 Dover's PCA (Zones 1 & 2) has the highest combined population in the study area, at 40,744 in 2012, which is expected to grow to 45,574 by 2026, and 47,492 by 2031 (+16.6%). Deal's PCA (Zones 4 & 5) has a slightly lower population of 29,612 in 2012, which is expected to grow to 33, 336 by 2026 and 34, 783 by 2031 (17. 33 %).

5.11 Please note, Increase in population as a result of planned housing growth is incorporated elsewhere in the economic capacity model.

Average Expenditure Levels (2012)

5.12 Table 2 sets out the base year (2012) average expenditure per capita levels for convenience goods (**Appendix 6**) and comparison goods (**Appendix 7**) within the eight study area zones.

5.13 As described above, an allowance has been made for the market share of 'non-store' Special Forms of Trading (SFT) at the base year and over the forecast period to take into account purchases that generally occur outside of shops (such as, for example, via mail order, vending machines, market stalls and the Internet).

5.14 Based on recent forecasts published by EBS and the results of the household survey, we have adopted EBS estimates that SFT will account for 4.6% of average convenience goods expenditure at the base year, increasing to 7.0% by 2031. For comparison goods, SFT is estimated to account for 10.9% of expenditure at the base year and is forecast to increase to 12% by 2031.

5.15 Notwithstanding the use of robust forecasts, we caution that growth could be higher over the long term for two reasons:

- First, EBS have assumed that after 2018 internet shopping will grow in line with total retail sales, reflecting the maturing of the market. However, if the growth of online retail spending was to continue at current levels, then there is clearly potential for more significant growth in SFT post-2018.

- Second, the SFT allowance for both convenience and comparison goods also takes account of the fact that a proportion of online sales are sourced from regular stores rather than dedicated warehouses (particularly in the case of foodstore operators). This implies an increase in required store floorspace to cater for rising internet sales. However, the trend towards 'click-and-collect' services and the development of so-called 'dark stores' dedicated solely to internet food shopping could fuel stronger growth in SFT over time.

5.16 We therefore recommend that the Council monitors the research relating to the growth of on-line shopping and updates the forecast growth rates when necessary.

Expenditure Growth (2012 – 2031)

5.17 For the purpose of this strategic assessment we have adopted forecast annual growth rates in per capita convenience and comparison goods expenditure from the latest *Retail Planner Briefing Note 9* (September 2011) prepared by Experian Business Strategies (EBS).

5.18 For convenience goods, annual expenditure growth rates were recorded at 0.8% in 2010. EBS forecasts are for negative growth in both 2011 (-0.3%) and 2012 (-0.4%), returning to positive annual growth of 0.5% between 2013 and 2018, and rising slightly to 0.6% between 2019 and 2031.

5.19 For comparison goods, expenditure growth rates in 2012 were recorded at 0.1%. EBS forecasts are for growth of 0.5% in 2011, 1.6% in 2012, 2.10% in 2013, and stabilising at 3.0% between 2014 and 2031. We consider that these assumptions are reasonable and robust, particularly bearing in mind industry-wide consensus that spending growth will be lower than previous historic levels (which were recorded around 0.6% per annum for convenience expenditure and 5.9% per annum for comparison goods expenditure between 1990 – 2010).

5.20 Total available retail expenditure in the study area and zones is derived by multiplying the population and expenditure per capita levels over the forecast period.

5.21 At the base year there is estimated to be some £229.3m of available convenience goods expenditure in the study area (see Table 3, **Appendix 6**) and £320.5m of comparison goods expenditure (Table 3, **Appendix 7**). Between 2012 and 2031:

- total **convenience goods** expenditure in the study area (i.e. Zones 1-8) is forecast to increase to £269.8m by 2026 (+ 17.7%) and £289.1m by 2031 (+26.1%); and
- total **comparison goods** expenditure is forecast to grow to £523.3m by 2026 (+ 64.8%) and £638.9m by 2031 (+99.4%).

5.22 The forecast growth in comparison goods expenditure significantly outstrips convenience goods expenditure growth. As we demonstrate below, this has implications for the forecasts of residual expenditure.

'BASELINE' TURNOVER ASSESSMENT

5.23 The next key stage in the capacity assessment involves establishing the relative 'baseline' turnover of the District's existing centres and stores. This is fundamental to the assessment of what, if any, surplus capacity is likely to arise over the forecast period. As stated previously, there are two accepted approaches for assessing the trading performance of existing centres and stores:

- **'Benchmark' turnover levels** – this approach assesses the turnover of centres/stores informed by the published company average sales densities (£ per sqm) for specific retailers, where available. For convenience goods retailing, and principally the main foodstore operators, it is possible to robustly assess 'benchmark' turnover levels based on the published company average sales figures (Table 4, **Appendix 6**). Where such information is not available for the District's smaller stores and other convenience floorspace, we have made informed judgements as to their likely average turnover levels based on the available evidence and research[15]. The amount of comparison goods floorspace in Dover District has been informed by the Experian Goad Category Reports for Dover, Deal and Sandwich and the 2007 RNAS. No benchmark turnover levels have been estimated for comparison goods floorspace due to the very limited availability of published 'benchmark' turnover data.
- **'Potential' turnover levels** – this approach involves allocating all available convenience and comparison goods expenditure (£ million) in the study area (Table 3, **Appendices 6 & 7**) based on the market shares (%) derived from the household survey. As described in Section 4, the market share analysis helps us understand the 'retention' of expenditure which is currently directed to the existing retail floorspace in the District, as well as identifying any significant 'leakage' to centres/stores located outside of the District.

5.24 If the quantitative assessment indicates that 'potential' turnover estimates are significantly above or below 'benchmark' levels, this can provide an indication that existing floorspace/stores is either overtrading or under-performing.

CONVENIENCE GOODS CAPACITY FORECAST

Turnover Performance

5.25 The next step in assessing expenditure available to support new convenience goods floorspace is to find out how much of existing expenditure is currently "captured" by existing centres and stores within the District.

5.26 Available convenience goods expenditure (£ million) is allocated to the District's centres/stores from the study zones at the base year (2012) based on the market shares

15 This includes the Dover Rural Retail Survey (2004), previous Retail Studies, the location, scale and type of convenience floorspace; the size and affluence of the catchment population; accessibility by different modes of travel, etc.

(%) derived from the household survey (see Table 5, **Appendix 6**). For the purpose of this assessment we have assumed constant market shares over the forecast period to allocate forecast expenditure to centres/stores at 2017, 2022, 2026, 2027 and 2031 (see Tables 6-11).

5.27 The market share analysis in Appendix 3 does not take into account the fact that some of the District's centres/stores will draw retail expenditure from outside the study area. To incorporate this into the model, Table 12 (Appendix 6) sets out estimates additional trade which is expected to be drawn into the District's main centres and stores from outside of the study area. These trade draw estimates are informed by retail spend from tourism recorded in *The Economic Impact of Tourism on Kent and Medway* (December 2010), as well as other factors including, inter alia, the location, scale and attractiveness of the retail offer in each centre/store; accessibility and parking provision; the distribution of competing centres/stores both within and outside the study area; and the retail expenditure derived from tourists, day-trippers and commuters living outside the study area.

5.28 Table 13 (Appendix 6) sets out the total 'potential' turnovers of the main centres/stores in the District across the study period, based on market shares and estimates of trade draw from outside of the study area.

5.29 Table 14 (Appendix 6) depicts the baseline convenience goods capacity assessment, which is derived by comparing the benchmark sales density of all convenience floorspace in the District (Step 1) to the total 'potential' turnover of all centres and stores derived from the 2012 market shares (Step 2). Table 14 shows that centres and stores in the District are currently trading above benchmark levels by £17.4m in 2012, with this baseline capacity (excluding commitments) growing to £58.5m by 2031.

5.30 Table 21 breaks this down into a more detailed analysis showing which stores in the District are trading above benchmark levels and by how much. Overall, Dover appears to be trading around benchmark turnover levels. However, most individual stores are actually trading slightly below benchmark levels. Instead, the overall trading level for Dover is due primarily to the nominal overtrading of the Tesco Extra in White Cliffs Business Park (which is trading 41% above the national benchmark). Likewise, whereas Deal and Sandwich, overall, appear to be trading circa 37.1% above benchmark levels, this is mostly due to the significant (circa 83%) overtrading of the Sainsbury's on West Street in Deal. All other stores appear to be trading at or around benchmark levels.

5.31 The *Practice Guidance* (paragraph B.42) advises that 'benchmarks' should not be used "prescriptively" or used in "isolation" to indicate a measure of "need". This is because operators in different locations will trade significantly above or below their company averages depending on a range of factors. As a result, given the inherent margins of error involved in this type of exercise, the *Practice Guidance* advises that 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"* (paragraph B.43).

Other supporting evidence will include, for example, the results of in-centre health checks, or any signs of in-store congestion and/or queuing at checkouts.

5.32 In this case there is quantitative and qualitative evidence to indicate that the strong trading performance of the District's main out-of-centre stores is in contrast to the relatively poor performance of Dover town centre, which is achieving a total 'potential' convenience goods turnover some 20% below its estimated 'benchmark'. Bearing in mind relatively limited scale, quality and choice of foodstores in Dover town centre, and 'in centre' stores are currently estimated to be trading at levels some 20% below 'benchmark', our 'baseline' capacity assessment is based on the presumption that:

a. there is residual expenditure capacity at the base year due to the strong trading performance of the Tesco Extra at White Cliffs and Sainsbury's in Deal; and

b. this residual expenditure can be directed to the District's retail centres first, subject to the availability of a suitable site.

Planned Housing Growth

5.33 As stated above, the baseline convenience capacity shown in Table 14 (Appendix 6) is derived from the growth of the existing population and does not take into account planned housing growth contained within the Adopted Core Strategy. However, this needs to be taken into account to plan adequately for the District's retail needs over the plan period.

5.34 Table 15 (Appendix 6) sets out the steps taken to estimate the total amount of convenience goods expenditure which will be derived as a result of planned housing growth. For the purpose of this assessment, we have assumed that each new dwelling will have an average of 2.30 residents (provided by Kent County Council) and average convenience spend per person will remain consistent with average District-wide levels (as derived from Experian Population Reports for 2012). We have also applied the constant market share approach when estimate the total amount of convenience expenditure which will be retained within the District.

5.35 Core Strategy Policy CP3 sets the total District-wide housing target of delivering 14,000 new homes. It also distributes this housing need across Dover, Deal & Sandwich, Aylesham and elsewhere across the District. To take this into account, Table 15 (Appendix 6) sets out the expected distribution of new housing across these areas across the study period. Please note we have taken into account Kent County Council's estimates of completions up to 2011 to avoid double counting. Planned housing growth is estimated to result in a total of 21,827 additional people in the District over the plan period and up to 29,141 by 2031.

5.36 After discounting an element of expenditure which is expected to "leak" out of the District (consistent with the constant market share approach derived from the 2012 HTIS), Table 15 shows that planned housing growth is estimated to contribute an additional £2.3m of available convenience expenditure in 2012. This is expected to grow to £883.6m by 2026 and £46.1m by 2031.

5.37 Dover is expected to retain the majority (circa 70%) of this additional expenditure, with the remainder going to Deal & Sandwich (15%) and the remainder (15%) distributed across other areas in the District such as Aylesham.

Retail Commitments & Strategic Allocations

5.38 Prior to deriving the projected capacity for new retail floorspace for each area in the District, it is important to first take into account any committed floorspace. This will effectively take the first 'slice' of any forecast residual expenditure capacity at the base year and over the forecast period and prevent overprovision of floorspace.

5.39 The only commitment for convenience goods floorspace identified is at the St. James Redevelopment in Dover Town Centre (Planning Reference DOV/11/01056). Planning permission was granted for 10,682 sqm (net) of new retail floorspace and the planning statement accompanying the application estimated 30% would be used for the sale of convenience goods. As an operator is not attached, we have assumed that this floorspace will trade at an average of £12,000/ sqm, which is reasonable bearing in mind the average turnovers of the top five national foodstore operators. As a result, the development is expected to turnover £38.5m in 2012. This grows to £40.5 in 2031 after taking into account annual productivity growth rates for convenience goods floorspace.

5.40 An estimate of retail floorspace from strategic allocations in Dover Waterfront, Dover Mid-Town and Whitfield (Table 18b, Appendix 6) has been included in the study. However, these should be taken as working estimates that will be refined through any subsequent masterplans.

Capacity for New Convenience Floorspace

5.41 In order to be consistent with the Core Strategy, we have split the forecasted need between Dover, Deal & Sandwich, and all other settlements across the District by applying constant market shares set out in Table 17 (Appendix 6).

5.42 Taking into account each of the steps detailed above, Tables 18a – 20 (Appendix 6) show the detailed convenience goods capacity forecasts for Dover, Deal & Sandwich and all other areas in the District. These are summarised in the table below.

Table 5.5 Convenience Goods Capacity – Assuming 'overtrading' at 2012 (net sqm)

	2012	2017	2022	2026	2031
DOVER (not including Strategic Allocations)					
Major food superstore:	-2,198	-1,101	172	1,028	2,293
OR Supermarket / Deep Discounter:	-4,396	-2,202	343	1,452	4,587
DOVER (incl. Strategic Allocations)					
Major food superstore:	-6,087	-4,983	-3,706	-3,163	-1,596
OR Supermarket / Deep Discounter:	-12,174	-9,965	-7,412	-6,326	-3,192
DEAL & SANDWICH					
Major food superstore:	537	1,030	1,548	1,711	2,064
OR Supermarket / Deep Discounter:	1,074	2,061	3,097	3,422	4,129
ALL OTHER IN DISTRICT					
Major food superstore:	95	346	587	678	720
OR Supermarket / Deep Discounter:	189	692	1,173	1,356	1, 441
TOTAL ACROSS DISTRICT (not incl. Strategic Allocations)					
Major food superstore:	-1,566	276	2,307	3,115	5,078
OR Supermarket / Deep Discounter:	-3,132	551	4,613	6,230	10,156
TOTAL ACROSS DISTRICT (incl. Strategic Allocations)					
Major food superstore:	-5,456	-3,606	-1,571	-774	1,189
OR Supermarket / Deep Discounter:	-10,911	-7,212	-3,142	-1,548	2,377

Source: Tables 18a-20, Appendix 6.

5.43 In order to convert the residual expenditure (after allowing for all new commitments) into a net sales floorspace figure we have assumed a major superstore operator would achieve an average sales density of circa £12,000 per sqm in 2012 (based on the published average sales figures for Asda, Tesco, Sainsbury's, Morrison's and Waitrose) and a smaller format supermarket and/or deep discounter would achieve an average sales density of £6,000 per sqm (based on the published sales levels for a range of operators including, Co-Op, Budgens, Lidl and Aldi).

5.44 As described above, request we have also considered net forecast capacity including strategic allocations at the Council's request.

5.45 Based on the key assumptions set out above and including estimates for the strategic allocations, forecasts indicate a negative capacity for new convenience floorspace in Dover until 2026. This is due to strategic allocations at St. James and Dover Waterfront. By way of comparison, the Core Strategy identifies a negative capacity for Dover of -6,800 sqm (gross) in 2027.

5.46 In Deal and Sandwich, there is capacity for 537 sqm (net) of new 'superstore format' convenience floorspace in 2012, growing to 1,711 sqm (net) by 2026 and 2,064 sqm (net) by 2031. This is roughly similar to Core Strategy's requirement for 2,300 sqm (gross) additional convenience floorspace by 2026.

5.47 Elsewhere within the District, we have identified a forecast need for 95 sqm (net) of new 'superstore format' convenience floorspace in 2012, growing to 678 sqm (net) by 2026 and 720 sqm (net) by 2031.

5.48 Furthermore, the capacity assessment follows a standard <u>constant market share</u> approach and does <u>not</u> therefore model the potential uplift in 'retention levels' that can occur within catchment areas following new retail development. Based on the high 'retention levels' of 94.7% in Dover's PCA and 94.7% in Deal's PCA, we do not consider that there is scope in these cases to increase the market shares in these zones to justify new retail floorspace. However, there may be scope to increase retention in Sandwich's PCA (Zone 6) and potentially elsewhere in the study area.

5.49 If it is not possible to identify or allocate sites in centres for stores of an appropriate scale, then we would advise that capacity forecasts should <u>not</u> necessarily be used to support further out-of-centre retail floorspace, unless the Council is satisfied that proposals are in compliance with the sequential 'test' and will not harm the overall vitality and viability of existing centres, in compliance with the advice set out in the NPPF.

5.50 As stated previously, we advise that all capacity forecasts beyond a 5 year period should also be treated with caution and do not necessarily represent 'thresholds' or 'targets' that should be met.

COMPARISON GOODS CAPACITY ASSESSMENT

Turnover Performance

5.51 Table 5 (**Appendix 7**) allocates all available comparison goods expenditure (£ million) in the study area at 2012 to the District's existing retail floorspace based on the market shares (%) derived from the household survey. As with convenience goods retailing, we have assumed <u>constant market shares</u> over the forecast period to determine the allocation of expenditure to all centres/stores at 2017, 2022,2026, 2027 and 2031 (see Tables 7-10).

5.52 Table 11 (Appendix 7) sets out our informed judgements as to the likely draw of comparison goods expenditure from outside the study area. As with convenience, these estimates are informed by retail spend from tourism recorded in *The Economic Impact of Tourism on Kent and Medway* (December 2010), as well as other factors including, inter alia, the location, scale and attractiveness of the retail offer in each centre/store; accessibility and parking provision; the distribution of competing centres/stores both within and outside the study area; and the retail expenditure derived from tourists, day-trippers and commuters living outside the study area.

5.53 Table 13 (Appendix 7) sets out the total 'potential' turnover estimates for all the District's main centres in 2012 based on 2012 market shares and our estimates of trade draw from outside the study area.

5.54 Table 14 (Appendix 7) shows the derived average sales densities (£ per sqm) based on our estimates of the comparison goods sales area of the District's main centres/stores. As described earlier, we have not estimated 'benchmark' turnover levels of existing floorspace. This is because the evidence detailing the sales areas and average turnover performance of the District's centres and shopping parades is not as robust or reliable as for foodstores. For example, there is no accepted published information detailing the average turnover levels of different sized centres. We have therefore placed more weight on the results of the 2012 HTIS and have assumed that the survey-derived 'potential' turnover estimates approximate 'benchmark' levels. Notwithstanding this, Table 14 shows that due to growth in expenditure rates out-pacing productivity growth rates, there is an estimated baseline capacity for £65.8m by 2026 and £102.4m by 2031 (not including commitments).

5.55 Overall, Table 14 (Appendix 7) shows that the District's stores and facilities are currently trading at around £3,755/sqm. Based on our assessments of the performance of different types of centres and shopping locations in the UK, we have found that average sales densities can range from circa £2,000 per sqm for smaller centres, up to £7,000 per sqm and above for successful centres. It therefore appears that the District's floorspace is trading around expected levels.

Planned Housing Growth

5.56 As with comparison goods, the baseline convenience capacity shown in Table 14 (Appendix 7) is derived from the growth of the existing population and does not take into account planned housing growth contained within the Adopted Core Strategy. However, this needs to be taken into account to plan adequately for the District's retail needs over the plan period.

5.57 The same process is applied as during the convenience goods capacity assessment to estimate the total amount of comparison goods retail expenditure available over the plan period as a result of planned housing growth. The average spend per person is consistent with District-wide average and the amount of new expenditure estimated to be retained within the District is consistent with the results of the market share assessment (44.5%) adopting a <u>constant market share</u> approach. The result is an estimated total of £4.7m of additional comparison goods expenditure in 2012, growing to £64.8m by 2031. Dover is expected to retain the majority (circa 70%) of this additional expenditure, with the remainder going to Deal & Sandwich (15%) and distributed more widely across other areas in the District (15%) such as Aylesham.

Retail Commitments & Strategic Allocations

5.58 As with the convenience goods capacity assessment, it is necessary to take into account any committed floorspace before determining forecast residual expenditure capacity at the base year and over the forecast period. The capacity forecasts have taken into account the strategic allocations in the adopted Core Strategy.

5.59 There are two existing commitments for comparison goods floorspace in the District. The first is the permission for the St. James Development (Planning Reference DOV/11/01056) which was granted in June 2012 and includes an additional 10,682 sqm (net) of new retail floorspace, of which approximately 70% will be for comparison goods. The second is for a new planning permission granted in October 2011 at White Cliffs Business Park (Reference DOV/07/00802) erection 5,829 sqm (gross) of retail floorspace comprised of six retail warehouse units, as well as a restaurant and access.

5.60 At the Council's request we have also, separately, taken into account estimates of new retail floorspace to be provided within strategic allocations at Dover Waterfront, Dover Mid-Town and Whitfield (Table 18b, Appendix 7). Please note these are working assumptions based on all available data and will need to be refined as part of any masterplans.

5.61 For the purposes of this assessment, we have assumed that floorspace for commitments and strategic allocations will trade at approximately £4,000/sqm. Taking this into account, we expect that committed development would turnover circa £45.6m in 2012, growing to £55.6m by 2031 as a result of taking into account productivity growth rates for comparison goods floorspace. We estimate that strategic allocations could turnover circa £82.9m by 2026, growing to £87.1m by 2031 taking into account productivity growth rates for comparison goods.

Capacity for New Comparison Floorspace

5.62 In order to be consistent with the Core Strategy, we have split the forecasted need between Dover, Deal & Sandwich, and all other settlements across the District by applying <u>constant market shares</u> set out in Table 17 (Appendix 7).

5.63 Taking into account each of the steps detailed above, Tables 18a – 20 (Appendix 7) show the detailed comparison goods capacity forecasts for Dover, Deal & Sandwich and all other areas in the District. These are summarised in the table below.

5.64 These are summarised in the table below.

Table 5.6 Comparison Goods Capacity (net sqm)

	2012	2017	2022	2026	2031
DOVER (not incl. Strategic Allocations)	-10,933	-6,904	-818	3,143	10,643
DOVER (incl. Strategic Allocations)	-28,818	-24,403	-17,891	-13,763	-5,851
DEAL & SANDWICH	260	1,756	4,025	5,401	7,301
ALL OTHER IN DISTRICT	62	388	775	987	1,191
TOTAL ACROSS DISTRICT (not incl. Strategic Allocations)	**-10,612**	**-4,760**	**3,982**	**9,531**	**19,135**
TOTAL ACROSS DISTRICT (incl. Strategic Allocations)	**-28,496**	**-22,259**	**-13,091**	**-7,375**	**2,641**

Source: Tables 18a - 20, Appendix 7

5.65 The forecast residual expenditure (after allowing for all new commitments) has been converted to a net retail sales area based on an assumed average sales density for all new comparison goods floorspace of circa £4,000 per sqm in 2012 (2010 prices). This is informed by the average turnover levels achieved by existing floorspace across the District. Notwithstanding this, it should be noted that the average sales levels for different retailers will vary due to a range of factors, including location and the scale and quality of the different comparison goods sold. For example, published 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 sqm, whereas large format electrical goods retailers (such as PC World and Comet) are achieving average sales of circa £7,000 per sqm. These different sales levels assumptions will have implications for the assessment of the need for, and impact of different types of comparison goods floorspace and retailers. It will also be a material consideration for the local planning authority when assessing and determining applications for large format retailing (such as retail warehouses for example).

5.66 Including the strategic allocations, the table shows that there is negative capacity for new retail floorspace in Dover across the assessment period. This is due to substantial outstanding comparison goods commitments at White Cliffs Business Park and St. James Development, and the strategic allocations in Dover Mid-town and Dover Waterfront. In comparison, the Core Strategy includes a requirement of 35,700 sqm (gross) for Dover (or circa 25,000 sqm (net)) by 2026. The difference in forecasts is driven largely by commitments and strategic allocations.

5.67 For Deal & Sandwich, there is a forecast need for circa 260 sqm (net) of new comparison goods floorspace in 2012, growing to 5,401 sqm (net) by 2026 and 7,301 sqm (net) by 2031.

5.68 Elsewhere in the District, there is a forecast need for 62 sqm (net) of new comparison goods retail floorspace in 2012, growing to 987 sqm (net) by 2026 and 1,191 sqm (net) by 2031.

5.69 It must be reiterated that this capacity assessment is based on a standard <u>constant market share approach</u> and does <u>not</u> therefore model the potential uplift in 'retention levels' that can occur within catchment areas following new retail development. In particular, the delivery of the St. James Development and strategic allocations at Dover Mid-town and Dover Waterfront will likely result in an overall uplift in market share and increase comparison goods expenditure in the area available to support additional new floorspace. Therefore, it does not necessarily mean that there is an overprovision of comparison goods floorspace in the District.

5.70 As for the convenience goods capacity forecasts, we advise that all forecasts beyond a 5 year period should be treated with caution and should not necessarily be treated as 'thresholds' or 'targets' that should be met.

SUMMARY

5.71 In summary, taking into account both commitments and strategic allocations, the updated retail assessment forecasts capacity for no new 'superstore format' convenience goods floorspace in Dover across the assessment period. In Deal/Sandwich there is capacity for 5,401 sqm (net) of new 'superstore format' convenience goods floorspace by 2026.

5.72 It should be noted that the base year capacity forecasts for convenience goods retailing are predicated on the future redistribution of residual expenditure from the District's existing out-of-centre stores (as a result of nominal 'over-trading') to new floorspace in Dover town centre. If there are no suitable and viable sites in Dover town centre or other centres that can meet the identified capacity, then any proposals for new retail floorspace in edge and/or out-of-centre locations will need to be assessed against the sequential and impact 'tests' in accordance with the advice set out in the NPPF.

5.73 Taking into account both commitments and strategic allocations, there appears to be no District wide capacity for comparison goods floorspace over the development plan period, growing to 2,641 sqm (net) by 2031. This is a result of significant strategic allocations in Dover. However, looking more specifically at the trade areas, the assessment shows that there is forecast capacity for Deal and Sandwich for 5,401 sqm (net) by 2026, growing to 7,301 sqm (net) by 2023.

5.74 Forecasts do <u>not</u> model the potential uplift in 'retention levels' that can occur within catchment areas following the delivery of retail commitments and strategic allocations. Negative capacity for new comparison floorspace in Dover up to 2031 does not, therefore, necessarily indicate an overprovision of planned retail floorspace.

5.75 It is important to restate that these capacity forecasts should be treated with caution, particularly post-2017, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, and the growth in retail spending, etc. For example, if the growth in Internet shopping is stronger than current forecasts suggest, then this will reduce the future demand and capacity for new 'physical' space over the long term.

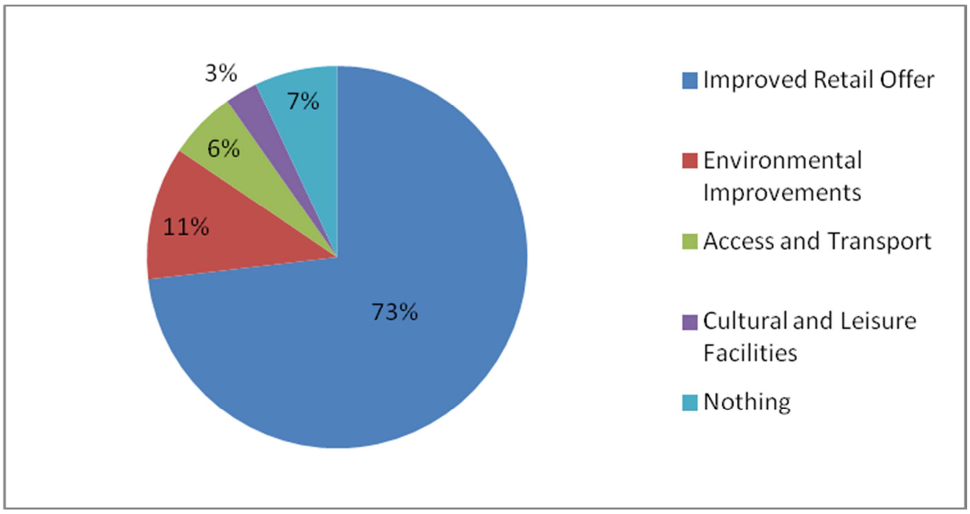
6.0 DESIRED IMPROVEMENTS TO THE MAIN CENTRES

6.1 As part of this study we have been asked to provide broad advice where any new floorspace should be directed across the District and its main centres. We have provided quantitative advice with respect to the distribution of forecasted retail need across the District in Section 5.0. Below, we supplement this information by assessing the results of the detailed results of the 2012 household survey to understand whether respondents have identified any desired qualitative improvements to the District's main centres.

Dover Sub-Regional Centre

6.2 Question 25 of the HTIS asked all respondents *"What improvements to Dover Town Centre, if any, would make you visit more often than you do?"* Figure 6.9 below depicts the top five overall improvements mentioned by respondents across the study area, categorised by overall theme.

Figure 6.9 Desired Improvements to Dover Town Centre – Across All Study Area

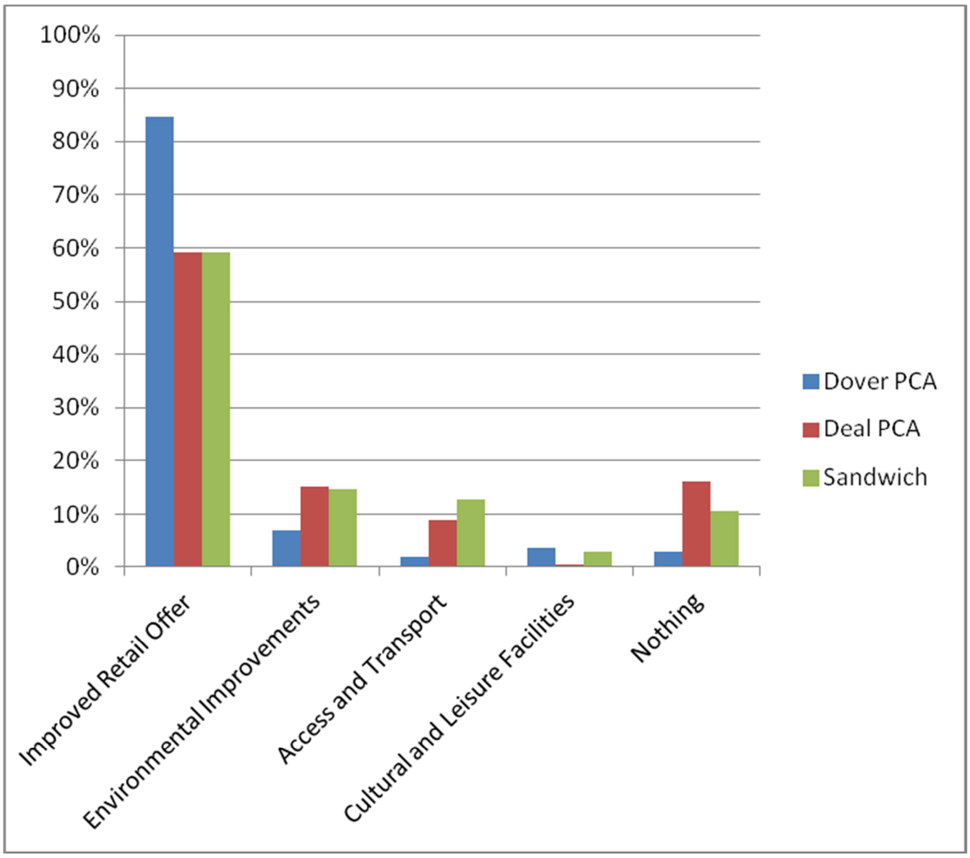


6.3 As shown, the majority of respondents who identified a desired improvement for Dover mentioned retail. Within this category, the top specific improvements mentioned were for more/better non-food shops (18%), fashion shops (9%), retail brands (8%), independent and specialist shops (8%) and a department store (8%).

6.4 Circa 11% of all respondents across the study area mentioned desires for environmental improvements to Dover. Within this theme, "complete refurbishment" was mentioned by 5% of all respondents, and "cleaner streets" was mentioned by 4%. The top mentions within the access theme was for "more/better car parking" (3%) and for cultural/leisure facilities, "more/better entertainment facilities" (1%). Overall, 7% said "nothing" would make them visit Dover more often.

6.5 Figure 6.10 compares responses to Question 25 of the HTIS by which PCA respondents live in. As shown, respondents living within Dover PCA (Zones 1 & 2) identified retail improvements comparatively more than those living in either Deal PCA (Zones 4 & 5) or Sandwich's PCA (Zone 6).

Figure 6.10 Desired Improvements to Dover Town Centre – By PCA



6.6 Within Dover's PCA, the most often cited specific retail improvements mentioned by respondents were for more/better non-food shops (23%), fashion shops (12%), retail brands (12%), a department store (9%) and independent/specialist shops (7%). Within the other themes, the top responses were for a complete refurbishment (4%) and more/better entertainment facilities such as a cinema (2%).

Deal District Centre

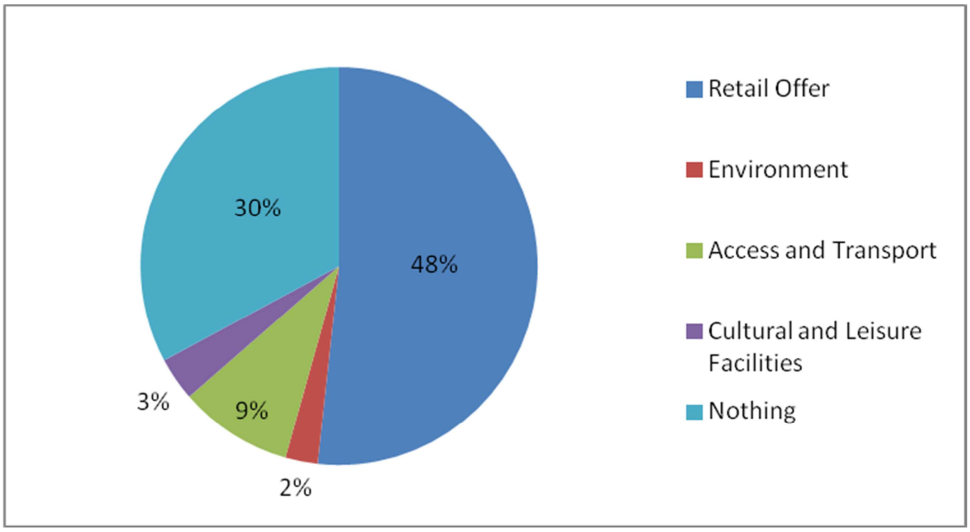
6.7 Question 26 of the 2012 HTIS asked "*What improvements to Deal Town Centre, if any, would make you visit it more often than you currently do*?" Figure 6.11 below shows the split between the major categories of response of all responses across the study area.

6.8 As shown, a relatively high number of respondents said "nothing" would make them visit Deal more often. This is consistent with the more localised role the centre plays within the District's retail hierarchy.

6.9 For those who did mention an improvement, retail was the most often cited theme. Within the retail theme, the most popular responses were for more/better non-food shops (10.5%), independent and specialist shops (7%), fashion shops (7%) and fewer vacancies (5%).

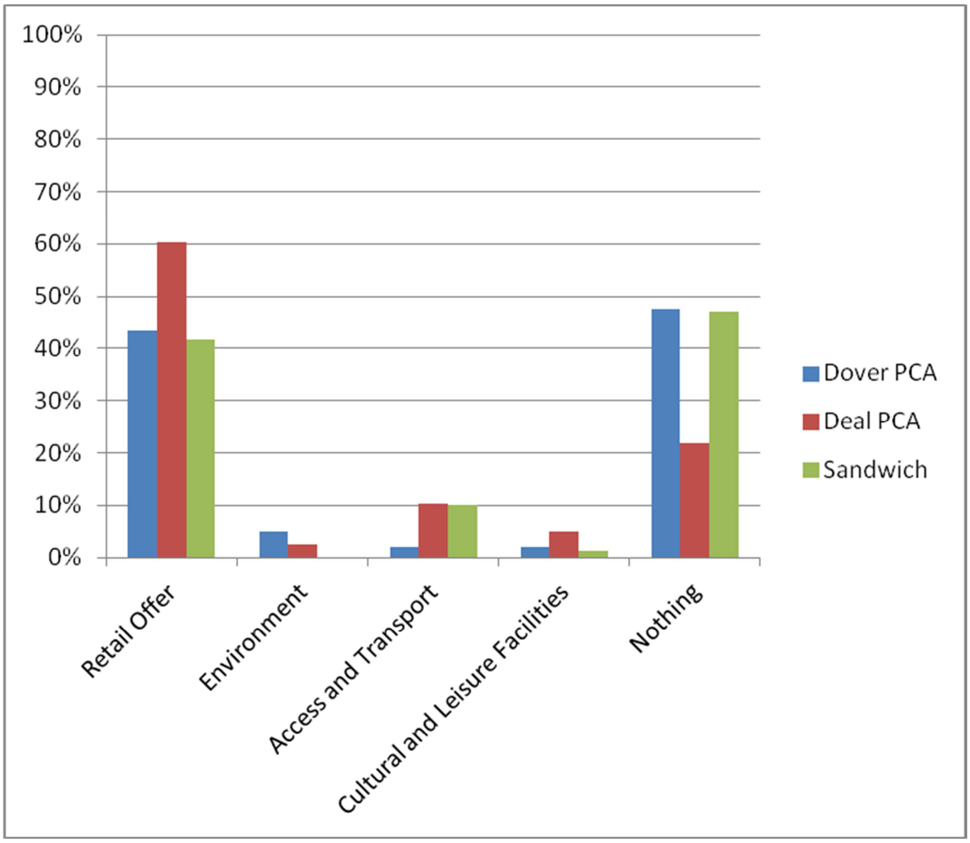
6.10 Within the other themes the most often cited responses were for more/better car parking (4%), cheaper parking (3%), more/better cafes and restaurants (2%) and cleaner streets (1%).

Figure 6.11 Desired Improvements to Deal District Centre – Across All Study Area



6.11 Figure 6.12 below compares responses to Question 25 of the HTIS by which PCA respondents live in. As shown, those living within Deal PCA have identified retail as the most desired improvement. A relatively high proportion of those living in Dover PCA and Sandwich indicated that "nothing" would make them visit Deal more often. This is relatively unsurprising given the role of the centre within the District's retail hierarchy; however it indicates that the level of linkages between Deal and Sandwich may be less strong than otherwise anticipated.

Figure 6.12 Desired Improvements to Deal Town Centre – By PCA

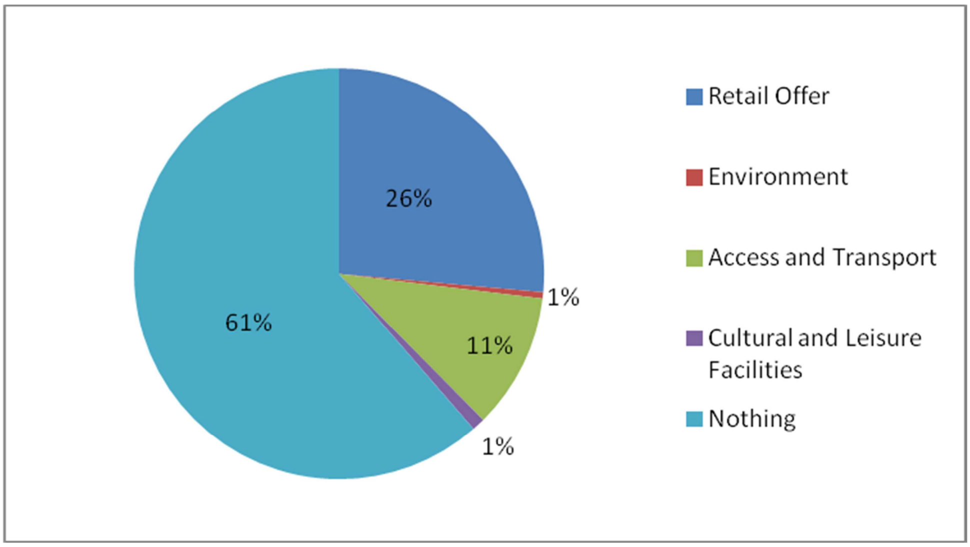


6.12 The most often cited specific retail improvements mentioned by respondents living within Deal's PCA were for more/better fashion shops (11%), non-food shops (10%) and fewer vacancies (9%). The most often cited responses in other themes were for more/better and cheaper car parking (8%) and more/better restaurant and cafes (3%).

Sandwich Rural Service Centre

6.13 Question 27 of the 2012 HTIS asked "*What improvements to Sandwich Town Centre, if any, would make you visit it more often than you currently do*?" Figure 6.13 below shows the split between the major categories of response of all responses across the study area. A high number of respondents said "nothing" would make them visit Sandwich more often, which is reasonable bearing in mind the role of the centre within the District's hierarchy.

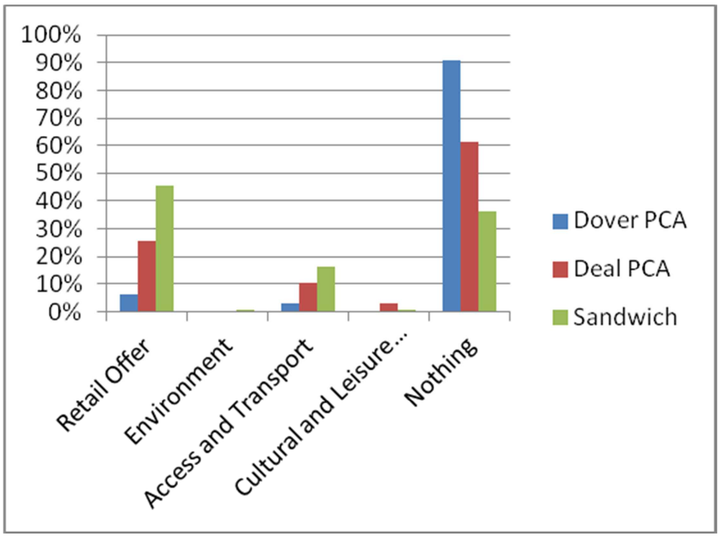
Figure 6.13 Desired Improvements to Sandwich Rural Service Centre – Across All Study Area



6.14 For respondents who did mention an improvement, retail was the most often cited response. Within this category, the most often mentioned responses were for more/better non-food shops (6%), fashion shops (4%) and retail brands (3%). Access and Transport was also more highly representative than responses for the other centres, with the most often cited specific response for more/better car parking (6%).

6.15 Figure 6.14 below compares various improvements desired for Sandwich Town Centre by where the respondent lived. As can be seen, those living within Sandwich's PCA (Zone 6) have identified more desired improvements for Sandwich than those living in either or Dover or Deal. This is to be expected bearing in mind the role of Sandwich in the retail hierarchy.

Figure 6.14 Desired Improvements to Sandwich Rural Service Centre – By PCA



6.16 The most often cited specific improvements cited by respondents living in Sandwich's PCA were for more/better non-food shops (12%), food shops (7%), and independent/specialist shops (5%). Within the access category, the highest responses were for more/better car parking (8%) and cheaper/free parking (6%).

SUMMARY

6.17 Both across the study area, and individually within each PCA, the detailed results of the 2012 HTIS indicate that the most desired improvement to the District's main centres is for more and better retail floorspace, specifically for non-food goods.

7.0 BOUNDARY DEFINITIONS

7.1 When drawing up Local Plans the NPPF clearly states that local planning authorities should, amongst other key objectives:

- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- 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. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local Planning Authorities should therefore undertake an assessment 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; and
- 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.

7.2 This study has reviewed the extent of the defined primary and secondary shopping frontages and town centre boundaries of Dover, Deal and Sandwich in light of the results of the present study.

7.3 In addition to providing the opportunity for the Council to produce area specific policies to guide the development of their centres, defining town and retail shopping boundaries are important to inform what is considered in "edge" or "out" of centre site in the context of the sequential assessment. For retail proposals, an "edge of centre" site is defined as a site "*well connected and up to 300 metres of the primary shopping area*" (NPPF, Appendix 2: Glossary). For all other main town centre uses, edge of centre sites are located "*within 300m of a town centre boundary*" (NPPF, Appendix 2: Glossary).

7.4 To advise on whether policy boundaries remain appropriate, we have considered changes in the mix of uses in the three towns over time using the results of the 2003 District-wide Retail Study, the most recent Experian Centre Reports and Plans for each of the three main centres, and the results of an update of the centres undertaken by the Council in July 2012. Due to lack of information about individual unit sizes, only outlet information is available for the 2012 analysis.

7.5 It should be noted that the centre boundaries defined by Experian Goad do not necessarily match the town centre boundaries or shopping frontages defined by local planning authorities in their Proposals Map. The Goad Reports may not therefore reflect the total amount of retail and town centre floorspace in a particular centre.

7.6 It should also be noted that the sum of the convenience and comparison goods floorspace figures should not be taken to completely represent Class A1 floorspace, as Experian Goad defines Class A1 uses (such as hairdressers) as "services."

DOVER

7.7 The Adopted Proposals Map identifies a town centre boundary, as well as both primary and secondary frontages.

7.8 Dover town centre is focused on a single main street which runs northwest to southwest. The boundary follows York Street and Priory Road to the west, Ladywell and Park Street to the north, Maison Dieu Road to the west and Townwall Street to the South.

7.9 Primary shopping frontages are defined on either side of Biggin Street and Canon Street from the junction with the High Street in the north to Market Square in south. The designated secondary frontage continues on either side of King Street down to Townwall Street, as well as on either side of Worthington Street and partway along Pencester Road).

7.10 In this case, the Experian Goad Plan and Reports cover an area which extends further north than the policy-defined centre, incorporating Charlton Centre, and both sides of the High Street from Ladywell to north of Bridge Street.

7.11 Table 7.7 below sets out changes in the mix of uses in Dover between 2003 and 2012.

Table 7.7 Change in Composition of Dover, 2003 - 2012

	2003		2011		2012	
	Gross Sqm	Outlet No.	Gross Sqm	Outlet No.	Gross Sqm	Outlet No.
Convenience	9,940 (18%)	27 (10%)	4,004 (7%)	23 (8%)	NA	27 (9%)
Comparison	29,170 (53%)	129 (45%)	19,129 (35%)	96 (33%)	NA	92 (32%)
Services	12,080 (22%)	91 (32%)	13,824 (25%)	99 (34%)	NA	101 (35%)
Vacant	3,810 (7%)	35 (12%)	17,549 (32%)	74 (25%)	NA	72 (25%)
Total	**55,000**	**282**	**54,529**	**292**	**NA**	**292**

Source: Goad Centre Reports for Dover in 2003 and 2011. 2012 data from Dover District Council. Figures may not sum due to rounding.

Convenience Goods

7.12 As Table 7.7 shows, convenience goods floorspace in the centre (as defined by Experian Goad) fell by approximately 60% between 2003 and 2011, from 9,940 sqm to 4,004 sqm. Convenience goods retailing currently represents some of 7% of total floorspace in the centre, which is significantly below the national average of 17%.

7.13 There was a decline in the overall number of convenience goods units recorded in the centre, from 27 in 2003 to 23 in 2011. However, the results of the Council's 2012 update shows that this has now risen back to 2003 levels. Convenience outlets now account for 9% of all town centre units, which is slightly higher than the national average of 8.5%.

7.14 The results of the 2012 HTIS indicate that provision in Dover town centre is supplemented by out-of-centre facilities (some of which are currently significantly overtrading). These stores help contribute to Dover PCA's high retention rate of 94.7% of convenience goods and also capture significant levels of expenditure from the wider study area. Notwithstanding this, due to their distance some ways out of the town centre it would be appear that linked trips are limited. Although the nominal over-trading of out-of-centre stores has partially driven the need for new floorspace in the District, this should be not used to defend the extension of out of centre stores and will be dependent upon finding appropriate sites in or at the edge of Dover town centre.

7.15 Overall, we consider that convenience goods floorspace in Dover town centre is significantly under-represented. Implementation of the recent permission for significant redevelopment in the St. James area will help to rejuvenate the town centre by providing a strong convenience anchor.

Comparison Goods

7.16 Table 7.7 shows that the amount of comparison goods floorspace in Dover town centre has fallen by approximately 34%, from 29,170 sqm in 2003 to 19,129 sqm in 2011. Comparison goods floorspace currently accounts for 35% of total town centre floorspace, which is lower than the national average of 46%.

7.17 The number of outlets has also fallen by 26% from 129 units in 2003 to 96 units in 2011. According to the results of the Council's recent update, this figure has fallen by another 8 units to 92 units in 2012. Comparison goods outlets currently account for 32% of total town centre outlets, which is lower than the national average of 41%.

7.18 The reason for this significant drop in comparison goods representation in the centre is unclear, however it may be linked to the vacancy of the large former Premus and Poundstop units at the northern end of the High Street as well as, potentially, extensive vacancies in the St. James area in preparation for its redevelopment.

Services

7.19 Service business floorspace as defined by Experian Goad is comprised of the following sub-categories:

- Retail services, including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.;
- Leisure services, comprising Class A3 (restaurants and cafes), Class A4 (drinking establishments) and Class A5 (hot food takeaways) uses; and
- Finance and professional services, covering Class A2 uses such as banks, estate agents, etc.

7.20 The total amount of service floorspace in Dover has increased from 12,080 sqm in 2003 to 13,824 sqm in 2011. Current provision represents some 25% of total floorspace, which is slightly above the national average of 23%.

7.21 The number of service units in the centre has increased from 91 units in 2003 to 101 units in 2012. Service units currently represent 35% of total town centre provision, which is consistent with the national average.

Vacancy Levels

7.22 Table 7.7 shows that the amount of vacant floorspace in Dover has almost quadrupled, from 3,810 sqm 2003 to 17,549 by 2011. Vacancies now represent approximately 32% of all floorspace in the town centre, significantly higher than the 12% national average.

7.23 The number of vacant units has increased from 35 in 2003 to 72 in 2012. They now represent 25% of all units, which is also higher than the national average of circa 14%.

7.24 Although it is not possible to definitely advise on the cause of this increase, as no Goad Plan was attached to the 2003 Retail Study, it appears to be largely due to a concentration of vacant units in St. James as the area is prepared for redevelopment.

7.25 In addition to St. James, there appears to be a concentration at the northern end of the High Street, outside of the policy-defined town centre boundary on the adopted Proposal Map. The main vacancies here appear to consist of two large vacant units (the former Poundstop and Premus), 6 out of 17 units in the Charlton Centre and a large vacant unit on the corner of Charlton Green and Bridge Street. As a result, the overall vacancy level for Dover will appear to be higher than the rates within the policy defined centre actually are.

Recommendations

7.26 With respect to the concentration of various town centre uses, the 2011 Goad Plan and results of the Council's 2012 update show that the largest concentration of retail units

units appear to be on Biggin Street and Canon Street, consistent with the designation of this area as primary shopping frontage.

7.27 There is a wider mix of uses along the secondary shopping frontage, including services and an element of vacancies, especially at the northern and southern fringes of the town centre. Town centre uses appear to have extended north of Biggin Street onto the High Street.

7.28 Overall, there is a significant under-representation of convenience goods floorspace in Dover town centre. We consider that the upcoming redevelopment of the St. James Area will become an important anchor the southern end of the High Street and help deliver significant improvements in the town centre. This should be further enhanced by the development of the Dover Waterfront area. Clearly, design will be an important factor in ensuring that new development here fosters linked trips and enhances the wider town centre as a whole.

7.29 Due to the strategic importance of the St. James development and Dover Waterfront, it is recommended that there is merit in including the Dover Waterfront within the town centre boundary. Upon implementation of the St. James, Dover Mid-town and Dover Waterfront, the local authority should undertake further investigations to determine the market uplift in retail expenditure, the linkages new development here will have to the town centre, and whether this area should also be incorporated as part of the primary shopping frontage.

DEAL

7.30 The Adopted Proposals Map designates a town centre boundary, as well as primary and secondary frontages.

7.31 Deal has a traditional north to south High Street which forms the heart of its centre. The designated town centre is bounded by West Street to the west and Beach Street to the east. The northern edge roughly follows Oak Street in the north and South Street in the south.

7.32 The primary shopping frontage is defined along the High Street between Park Street in the north and South Street in the south. The secondary frontage continues farther north and also perpendicular to the High Street on Park Street and Queen Street.

7.33 As with Dover, the Experian Goad Centre Report for Deal is based on the Goad Plan defined by Experian and are not entirely consistent with the policy-defined town centre area. In this case the Experian Goad Plan and Reports cover an area which is broadly similar to town centre area defined by the Council, however incorporates some "edge of centre" areas including the Sainsbury's on West Street and farther north along the High Street.

7.34 Table 7.8 below sets out the amount of floorspace (in sqm gross) and number of units devoted to respective use main town centre use categories in Deal in 2003, January 2012 and July 2012.

Table 7.8 Change in Composition of Deal, 2003 - 2012

	2003		January 2012		July 2012	
	Gross Sqm	Outlet No.	Gross Sqm	Outlet No.	Gross Sqm	Outlet No.
Convenience	6,320 (21%)	20 (10%)	6,986 (22%)	20 (9%)	NA	20 (9%)
Comparison	15,530 (53%)	110 (53%)	13,787 (43%)	104 (49%)	NA	104 (48%)
Services	5,850 (20%)	58 (28%)	7,154 (22%)	67 (32%)	NA	59 (27%)
Vacant	1,860 (6%)	19 (9%)	4,032 (13%)	20 (9%)	NA	32 (15%)
Total	**29,560**	**207**	**31,959**	**211**	**NA**	**215**

Source: Goad Centre Reports for Deal in 2003 and January 2012. July 2012 data from Dover District Council. Figures may not sum due to rounding.

Convenience Goods

7.35 Convenience goods floorspace in the centre (as defined by Experian Goad) has risen by approximately 10.5% between 2003 and January 2012, from 6,320 sqm to 6,986 sqm. Convenience goods retailing currently represents some of 22% of total floorspace in the centre, which is above the national average of 17%. However, as mentioned above, it should be noted that this includes the Sainsbury's on West Street which is actually defined as "edge of centre" by policy.

7.36 The number of convenience outlets in the centre has remained the same since 2003. Convenience units currently represent 9% of all town centre units, which is consistent with the national average.

7.37 Overall, we consider that convenience goods floorspace in Deal town centre is well-represented. The results of the 2012 HTIS indicate that the Sainsbury's on West Street plays a significant role in retaining convenience expenditure within the area. Due to its location at the edge of the town centre, it is recommended that the Sainsbury's on West Street, the car parking area, properties located on Queens Street are included within the town centre.

Comparison Goods

7.38 Table 7.8 shows that the amount of comparison goods floorspace in Deal District Centre has fallen by approximately 11%, from 15,530 sqm in 2003 to 13,787 sqm in 2011. As of January 2012, comparison goods floorspace represented 43% of all floorspace in the

(Experian defined) town centre. This is slightly lower than but similar to the national average of 46%.

7.39 The number of comparison goods outlets in Deal has fallen slightly from 110 units in 2003 to 104 units in July 2012. Comparison outlets represent 49% of total town centre units, which is higher than the national average of 41%.

Services

7.40 The total amount of service floorspace in Deal increased from 5,850 sqm in 2003 to 7,154 sqm in January 2012. Service floorspace represents 22% of total floorspace, which is comparable to the national average of 23%. However, the Council's most recent update indicates that this figure may have decreased.

7.41 The number of service outlets has fluctuated from 58 units in 2003, to 67 in 2011 and back to 59 in 2012. As of July 2012, service outlets currently account for 27% of total town centre units, which is lower than the national average of 35%.

Vacancy Levels

7.42 The amount of vacant floorspace in Deal has risen from 1,860 sqm in 2003 to 4,032 sqm in 2012. Notwithstanding this, as of January 2012, vacancies accounted for 13% of total town centre floorspace, which is less than the national average of 14%.

7.43 The number of vacant outlets remained relatively stable from 2003 to 2011, however between January and June 2012 the number of vacant outlets has increased from 20 units to 32. Notwithstanding this, vacancies account for 15% of all units in the centre which is roughly comparable to the national average of 14%.

Recommendations

7.44 The defined primary shopping frontage appears to have the highest proportion of convenience and comparison goods units, consistent with its policy designation.

7.45 It is significant to note that there do not appear to be any obvious concentrations of vacancies in the centre. Those units which are vacant appear to be located at the fringe of the town centre (such as off Beach Street facing the sea) and on the secondary frontages, which is to be expected.

SANDWICH

7.46 Sandwich does not have a defined town centre boundary or primary shopping frontages. It was considered inappropriate to designate such areas due to what was deemed as the relatively dispersed nature of the centre and the wide variety of the mix of uses there.

7.47 The centre follows a medieval street pattern, with the secondary frontage running along the length of King Street, turning into Delf Street and branches out into Market Street.

7.48 With the exception of the inclusion of the Co-Op on Moat Sole Road (which is considered edge of centre store in policy terms), and a few properties at the northern fringe of Market Street, the Goad Plan is relatively consistent with the extent of the defined Secondary Shopping Frontage.

7.49 Table 7.9 below shows the mix of uses in Sandwich according to the results of the most recent Goad Centre Report in 2011 and the Council's more recent update. Please note that no Goad report was published for Sandwich as part of the 2003 Retail Study.

Table 7.9 Change in Composition of Sandwich, 2011 - 2012

	2011		2012	
	Gross Sqm	Outlet No.	Gross Sqm	Outlet No.
Convenience	2,118 (22%)	8 (9%)	NA	10 (11%)
Comparison	3,660 (37%)	38 (41%)	NA	38 (41%)
Services	2,843 (29%)	34 (37%)	NA	37 (40%)
Vacant	1,208 (12%)	13 (14%)	NA	7 (8%)
Total	**9,829**	**93**	**NA**	**92**

Source: Goad Centre Report for Sandwich in 2011. 2012 data from Dover District Council. Figures may not sum due to rounding.

Convenience Goods

7.50 Convenience goods floorspace in the centre (as defined by Experian Goad) equates to approximately 2,118 sqm as of 2011 and accounts for 22% of all floorspace surveyed in the centre. This is above the national average of 17%.

7.51 The number of convenience units has increased, from 8 units surveyed in 2011 to 10 units in 2012. Convenience units now represent 11% of all outlets, which is lower than the national average of 17%.

7.52 We consider that convenience goods floorspace in Sandwich town centre is reasonably well-represented. The Co-Op on Moat Sole Road plays an important role in retaining shopping tips in the area. However, the results of the 2012 HTIS indicate that retention rate in Sandwich's PCA is lower than either Dover or Deal. Although this is to be expected bearing in mind Sandwich's status in the retail hierarchy and the scale of its food and convenience offer, it may also indicate a qualitative need for additional provision within or at the edge of the centre.

Comparison Goods

7.53 Comparison goods floorspace equates to 3,660 sqm and represents 37% of all floorspace in the (Experian defined) town centre. This is lower than the national average of 46%.

7.54 The number of comparison goods outlets in Sandwich has remained stable over the last year. Comparison goods account for 38 units and represent 41% of all units in the town centre, which is in line with the national average of 41%.

Services

7.55 Services account for 2,843 sqm of floorspace in the centre as of 2011 and represent 29% of total floorspace. This is slightly higher than the national average of 23%.

7.56 The number of service outlets has risen from 34 in 2011 to 37 in 2012. They currently represent 40% of all outlets, which is higher than the national average of 35%.

Vacancy Levels

7.57 As of 2011, 1,208 sqm of floorspace in Sandwich is classified as vacant. Vacancies account for 12% of total floorspace, which is the same as the national average.

7.58 The number of vacant outlets in the centre has reduced significantly from 11 units in 2011 to 7 units at present. Vacancies account for 8% of total units, which is significantly lower than the national average of 14%

Recommendations

7.59 The purpose of allocating only a secondary frontage in Sandwich was to allow for greater flexibility in the mix of uses encouraged in the centre. It appears that this policy has worked to help local businesses respond to the economic climate and has helped keep the vacancy rates for the centre relatively stable and in line with national averages. However, as there is no town centre boundary, primary shopping area or primary shopping frontages defined in Sandwich, this potentially leaves the Council open to debate with respect to what sites should be defined as "in", "edge" or "out" of centre for the purposes of the sequential assessment.

7.60 In order to protect the existing centre, it is recommended that the Council define either a town centre boundary or primary shopping area around the extent of the current secondary shopping frontage to provide clarity on which sites would be considered "edge" and "out" of centre.

OTHER CENTRES AND SETTLEMENTS

7.61 Although we have not been instructed to consider the definition of policy boundaries in other local centres and settlements within the District, we advise that the Council should consider defining centre boundaries where possible. This will provide clarity on which sites would be considered "in", "edge" and "out" of centre for the purpose of the sequential assessment and impact 'tests' carried out in compliance with the NPPF (paragraphs 24-27). In turn, this will enable the local planning authority to assess and determine the impacts and benefits of new proposals on relevant local centres on a case-by-case basis.

7.62 Where appropriate, the Council should consider defining local centre boundaries around concentrations of local services in the built up areas of Dover and Deal (specifically, in Temple Ewell, Whitfield and Walmer). This could encourage the further concentration of local services into local centres that serve the immediate needs of their local areas.

SUMMARY

7.63 The study has shown that there are high vacancy rates in Dover and the centre is significantly under-represented in terms of convenience goods provision. Dependent upon good design and connections, we anticipate that the implementation of the St. James development will provide an important anchor to the south of the town centre and generate wider enhancement to the centre through linked trips. The Council will need to investigate the potential impact of the development upon implementation to determine whether it should be incorporated within the primary shopping frontage.

7.64 The extension of the town centre boundary to include Dover Waterfront and Snargate Street will focus the regeneration and growth at the southern end Dover town centre (including the St. James area).

7.65 Within Deal, the mix of uses in the Experian defined centre is comparable to national averages. We have identified a cluster of retail uses (including several convenience units) to the north of the town centre on the High Street. We have advised that the Council consider incorporating these units the town centre boundary (potentially as secondary shopping frontage) to afford this area policy protection and to recognise its role as a natural extension to the High Street.

7.66 The results of the 2012 household survey indicate the important role that Sainsbury's on West Street plays in retaining shopping within Deal's PCA. Due to its immediate proximity to the defined town centre boundary, this store should be included within the defined town centre boundary to recognise its important role within the wider centre and afford it policy protection against competing out of centre developments.

7.67 In Sandwich, the Council has defined a primary shopping area or town centre boundary around the extent of the current secondary shopping frontage to provide clarity with respect to which sites can be defined as "in", "edge" or "out" of centre. Definition of a PSA around this area will mean that any proposals for new retail floorspace outside the PSA will be subject to the sequential and impact 'tests' carried out in compliance with the NPPF (paragraphs 24-27). In turn, this will enable the local planning authority to assess and determine the impacts and benefits of new proposals on the centre on a case-by-case basis.

7.68 Where appropriate, the Council could consider establishing similar boundaries in the District's other local centres and around concentrated local services areas within the built up urban areas of Dover and Deal (such as Temple Ewell, Whitfield and Walmer).

7.69 Although it has also been recommended that the District Council set a local threshold above which retail proposals will require consideration of an impact assessment to demonstrate that the application would not have a significant adverse impact on existing, committed and planned public and private investment in centres and town centre vitality and viability. For convenience goods, the Council should reserve the right to require a retail impact assessment for developments above 250 sqm (net) as this is the general threshold above which smaller centres could experience a negative impact as a result of branded multi-national operators. For comparison goods, this will depend upon the relative health, location and scale of each centre's non-food offer, however we suggest that the Council reserve the right to request an RIA above for applications above 500 sqm (net).

8.0 GLOSSARY OF TERMS

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. Planning for the future of such areas can be achieved successfully through the use of area action plans, with master plans or development briefs for particular sites. In London the international and metropolitan centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.
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. In London the major and many of the district centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.
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. In rural areas, large villages may perform the role of a local centre.
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 contiguous 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. *[In PPS6 the centre for a retail development constitutes the primary shopping area].*
PRIMARY FRONTAGE	Primary frontages are likely to include a high proportion of retail uses.
SECONDARY FRONTAGE	Secondary frontages provide greater opportunities for a diversity of uses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the

	attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
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	An out-of-centre development 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 *Practice Guidance* 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 –

APPENDIX 1: STUDY AREA

APPENDIX 2: HOUSEHOLD SURVEY – QUESTIONNAIRE & METHODOLOGY

APPENDIX 3: GOAD CENTRE REPORTS FOR DOVER, DEAL AND SANDWICH

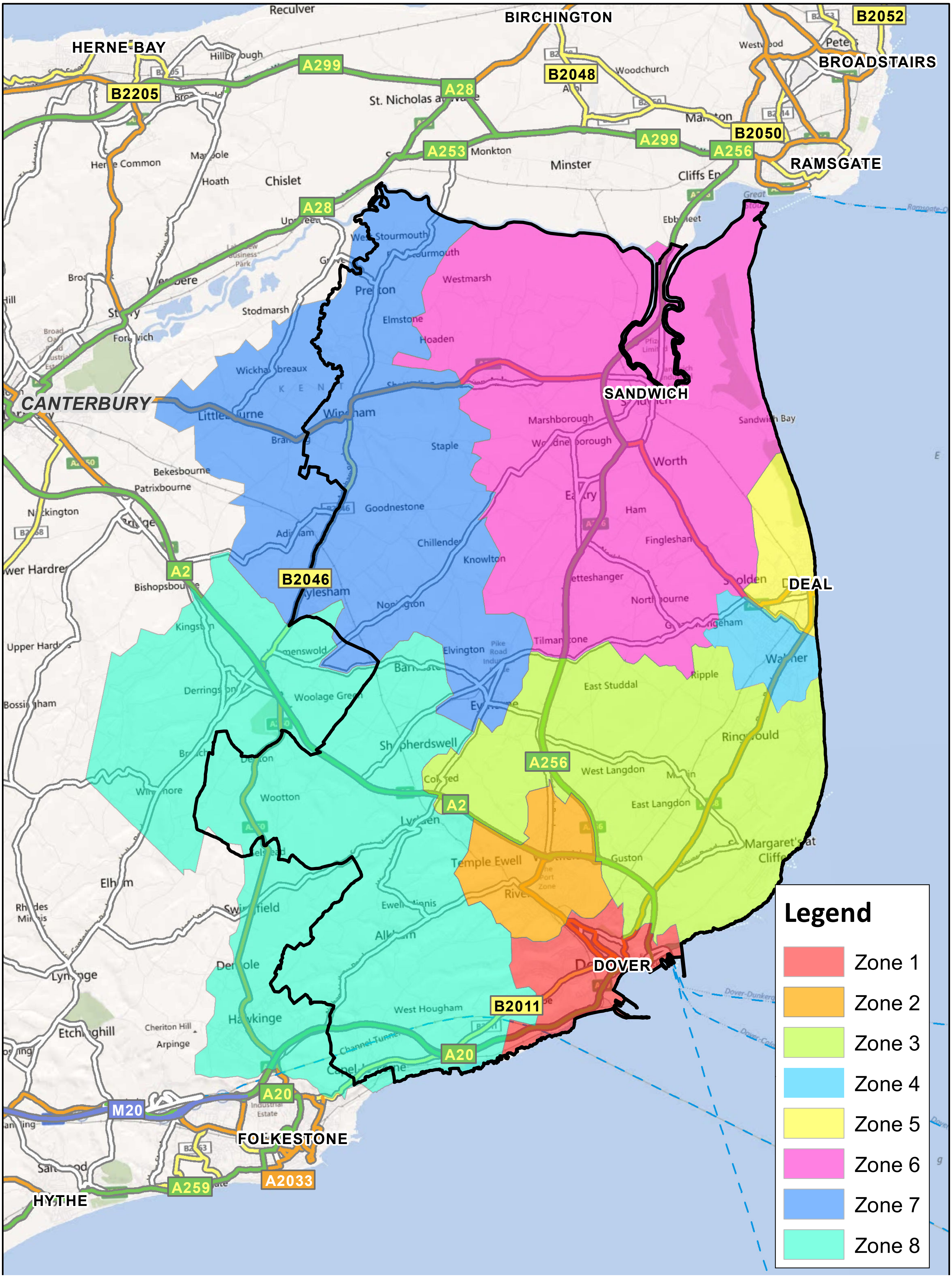
APPENDIX 4: CONVENIENCE GOODS - MARKET SHARE ANALYSIS

APPENDIX 5: COMPARISON GOODS - MARKET SHARE ANALYSIS

APPENDIX 6: BASELINE CONVENIENCE GOODS CAPACITY ASSESSMENT

APPENDIX 7: BASELINE COMPARISON GOODS CAPACITY ASSESSSMENT

Dover District Council Retail Study Area 2012



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Dover Household Survey
for
Planning Perspectives

June 2012

Job Ref: 080612

Table of Contents

Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Dover area to assess shopping habits for main food and grocery, top-up and non-food shopping. Respondents were also asked if they thought improvements were needed to Dover, Deal or Sandwich.

1.2 Research Methodology

A total of 800 telephone interviews were conducted between Wednesday 6th June 2012 and Wednesday 20th June 2012. 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 8 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1	CT16 1, CT16 2, CT17 0, CT17 9	100
2	CT16 2, CT16 3, CT17 0	100
3	CT14 8, CT15 5, CT15 6	100
4	CT14 7, CT14 9	100
5	CT14 6, CT14 7, CT14 9	100
6	CT3 1, CT3 2, CT13 0, CT13 9, CT14 0	100
7	CT3 1, CT3 3, CT4 6, CT15 4	100
8	CT4 6, CT15 7, CT18 7	100
Total		**800**

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

As sample sizes within each sector were not in proportion to population, the final tabulated data was weighted to make the overall results representative of the total population within the defined survey area. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Weighting
1	24,567	100	1.6219
2	16,194	100	1.0691
3	8,077	100	0.5332
4	13,794	100	0.9107
5	16,073	100	1.0611
6	13,944	100	0.9206
7	13,161	100	0.8689
8	15,369	100	1.0146
Total	**121,179**	**800**	

* Source: Census 2001

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 800 answers "Yes" to a question, we can be 95% sure that between 46.5% and 53.5% of the population holds the same opinion (i.e. +/- 3.5%).

The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10	±2.1
20	±2.8
30	±3.2
40	±3.4
50	±3.5

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 percent 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.

Job Number: 080612

Dover District Council - Household Survey Questionnaire

Good morning / afternoon / evening, my name is …. and I'm calling from NEMS Market Research, an independent market research company. We are conducting a short survey into the shopping behaviour of people in the area on behalf of Dover District Council to help inform emerging policy. We are also seeking views as to how the three main town centres can be improved. Do you have a few minutes to answer some questions please? It will take about 5 minutes.

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

Yes
No

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

Q01 Where do you normally go for your household's main food and grocery shopping (i.e. primarily bulk 'trolley' purchases)?
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER, PLEASE SPECIFY THE FOOD STORE NAME, ROAD / STREET NAME AND AREA.

Specific Stores:
001 Aldi, Boundary Road, Ramsgate
002 Aldi, Cherry Tree Avenue, Dover
003 Aldi, East Street, Sittingbourne
004 Aldi, High Street, Hythe
005 Aldi, Zion Place, Margate
006 Alldays, The Street, Ash
007 Asda Supercentre, Bouverie Place, Folkestone
008 Asda Supermarket, Charlton Green, Dover
009 Asda Superstore, Kimeberley Way, Ashford
010 Asda Superstore, Sturry Road, Canterbury
011 Asda Superstore, Westwood Road, Broadstairs
012 Budgens, Broadway Garage, Broadstairs
013 Budgens, St Lawrence, Ramsgate
014 Co-op, Beauchamp Avenue, Mill Hill, Deal
015 Co-op, Castle Street, Dover
016 Co-op, Cheriton Road, Folkestone
017 Co-op, Churchfield Way, Wye, Ashford
018 Co-op, Eythorne Road, Shepherdswell
019 Co-op, Grange Road, Ramsgate
020 Co-op, High Street, Cheriton, Folkestone
021 Co-op, High Street, Sturry, Canterbury
022 Co-op, Hopeville Avenue, St. Peters, Broadstairs
023 Co-op, Lord Warden, Hamilton Road, Deal
024 Co-op, Lower Road, River, Dover
025 Co-op, Main Road, Sellindge, Ashford
026 Co-op, Market Square, Aylesham
027 Co-op, Moat Sole Road, Sandwich
028 Co-op, Newington Road, Bush Parade, Ramsgate
029 Co-op, Park Street, Deal
030 Co-op, Queens Street, Deal
031 Co-op, Station Road, Birchington
032 Co-op, The Street, Ash
033 Co-op, Tothill Street, Minster, Thanet
034 Costcutter, Bewsbury Cross Lane, Whitfield
035 Costcutter, Bywater Transport Pike Road Industrial Estate, Eythorne
036 Costcutter, Fleming Way, Folkestone
037 Costcutter, Hereson Road, Ramsgate
038 Costcutter, Island Road, Canterbury
039 Costcutter, King Street, Ramsgate
040 Costcutter, Pencester Road, Dover
041 Costcutter, Sandgate Road, Folkestone
042 Costcutter, Sheriden Road, Dover
043 Farm Foods, Charlton Green, Dover
044 Farm Foods, New Street, Ashford
045 Iceland, College Walk, Margate
046 Iceland, High Street, Broadstairs
047 Iceland, High Street, Dover
048 Iceland, High Street, Hythe
049 Iceland, King Street, Ramsgate
050 Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury
051 Iceland, Mortimer Street, Herne Bay
052 Iceland, Queen Street, Deal
053 Iceland, Sandgate Lane Shopping Centre, West Terrace, Folkestone
054 Lidl, Haven Drive, Hawkinge
055 Lidl, Margate Road, Ramsgate
056 Lidl, New Street, Ashford
057 Lidl, Shellons Street, Folkestone
058 Lidl, Sturry Road, Canterbury
059 M&S Simply Food, Maybrook Retail Park, Sturry Road, Canterbury
060 M&S, Biggin Street, Dover
061 M&S, High Street, Deal
062 M&S, St Georges Street, Canterbury
063 M&S, Westwood Cross Centre, Margate Road, Thanet
064 Morrisons, Beach Street, Herne Bay
065 Morrisons, Bridge Street, Dover
066 Morrisons, Cheriton Road, Folkestone
067 Morrisons, College Walk, Halwye Street, Margate
068 Morrisons, Ten Perch Road, Canterbury

069 Sainsbury's Local, St. Dunstans, Canterbury
070 Sainsbury's Local, St. Lawrence Ground, Old Dover Road, Canterbury
071 Sainsbury's Military Road, Hythe
072 Sainsbury's West Street, Deal
073 Sainsbury's, Kingsmead Road, Canterbury
074 Sainsbury's, Margate Road, Broadstairs
075 Sainsbury's, Park Farm Road, Folkestone
076 Sainsbury's, Simone Weil Avenue, Ashford
077 Sansbury's Bouverie Road West, Folkestone
078 Spar, Blackbull Road, Folkestone
079 Spar, Dover South Service St, Limekiln Street, Dover
080 Spar, Folkestone Road, Dover
081 Spar, Market Street, Sandwich
082 Spar, The Centre, Newington, Ramsgate
083 Spar, Townwall Street, Dover
084 Tesco Express, Canterbury Road, Hawkinge
085 Tesco Express, Castle House, Bouverie Road West, Folkestone
086 Tesco Express, Foord Road, Folkestone
087 Tesco Express, Hereson Road, Ramsgate
088 Tesco Express, Mace Lane, Ashford
089 Tesco Express, Mill Hill, Deal
090 Tesco Express, Railway Bell, Dover Road, Folkestone
091 Tesco Extra, Hythe Road, Wilesborough, Ashford
092 Tesco Extra, Margate Road, Westwood, Broadstairs
093 Tesco Extra, Millstrood Road, Whitstable
094 Tesco Extra, White Cliffs Business Park, Whitfield, Dover
095 Tesco Metro, High Street, Broadstairs
096 Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury
097 Tesco Superstore, Cheriton High Street, Folkestone
098 Tesco Superstore, Moat Field Meadow, Kingsnorth, Ashford
099 Tesco Supertore, Manston Road, Ramsgate
100 Waitrose, Prospect Road, Hythe
101 Waitrose, Queen Street, Ramsgate
102 Waitrose, Repton Park, Ashford
103 Waitrose, St. Georges Centre, Canterbury

Local Stores / Markets:

104 Ash - local stores
105 Capel-le-Ferne - local stores
106 Deal - local stores
107 Deal - markets
108 Dover - local stores
109 Dover - markets
110 Eastry - local stores
111 Sandwich - local stores
112 Sandwich - markets
113 Shepherdswell - local stores
114 Wingham - local stores

Others:

115 Internet / mail order / catalogue (PLEASE WRITE IN)
116 Other (PLEASE WRITE IN)
117 (Don't know / varies)
118 (Don't do main food shopping) **GO TO CLOSE**

Q02 What is the main reason you choose (STORE MENTIONED AT Q01) to do your main food and grocery shopping?

DO NOT READ OUT. ONE ANSWER ONLY.

1 Accessibility by public transport
2 Convenient to home
3 Convenient to work
4 Free car parking
5 Good car parking provision
6 Low / competitive prices
7 Quality of fresh food / goods
8 Choice of food goods available
9 Choice of non- food goods (e.g. clothes, DVDs, etc)
A Instore delicatessen / bakery / fresh fish counter etc
B Use of in-store cafe
C Use of cash point / ATM
D Petrol station / car wash
E Clubcard / rewards system
F Preference for retailer
G Good shopping environment
H Provision of non-food goods shopping nearby
I Provision of leisure services nearby
J Provision of services nearby, such as banks and other financial services
K Other (PLEASE WRITE IN)
L (Don't know / varies)

Not those who mentioned internet at Q01

Q03 How do you normally travel to (STORE / DESTINATION 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
B Other (PLEASE WRITE IN)
C (Don't know / varies)

Q04 How often do you normally do your main food shopping at (STORE / DESTINATION MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Less often
6 (Varies)
7 (Don't know)

Q05 In addition to (STORE MENTIONED AT Q01), is there any other store that you regularly use for your main-food shopping, INCLUDING INTERNET SHOPPING?
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER, PLEASE SPECIFY THE FOOD STORE NAME, ROAD / STREET NAME AND AREA.

Specific Stores:
001 Aldi, Boundary Road, Ramsgate
002 Aldi, Cherry Tree Avenue, Dover
003 Aldi, East Street, Sittingbourne
004 Aldi, High Street, Hythe
005 Aldi, Zion Place, Margate
006 Alldays, The Street, Ash
007 Asda Supercentre, Bouverie Place, Folkestone
008 Asda Supermarket, Charlton Green, Dover
009 Asda Superstore, Kimeberley Way, Ashford
010 Asda Superstore, Sturry Road, Canterbury
011 Asda Superstore, Westwood Road, Broadstairs
012 Budgens, Broadway Garage, Broadstairs
013 Budgens, St Lawrence, Ramsgate
014 Co-op, Beauchamp Avenue, Mill Hill, Deal
015 Co-op, Castle Street, Dover
016 Co-op, Cheriton Road, Folkestone
017 Co-op, Churchfield Way, Wye, Ashford
018 Co-op, Eythorne Road, Shepherdswell
019 Co-op, Grange Road, Ramsgate
020 Co-op, High Street, Cheriton, Folkestone
021 Co-op, High Street, Sturry, Canterbury
022 Co-op, Hopeville Avenue, St. Peters, Broadstairs
023 Co-op, Lord Warden, Hamilton Road, Deal
024 Co-op, Lower Road, River, Dover
025 Co-op, Main Road, Sellindge, Ashford
026 Co-op, Market Square, Aylesham
027 Co-op, Moat Sole Road, Sandwich
028 Co-op, Newington Road, Bush Parade, Ramsgate
029 Co-op, Park Street, Deal
030 Co-op, Queens Street, Deal
031 Co-op, Station Road, Birchington
032 Co-op, The Street, Ash
033 Co-op, Tothill Street, Minster, Thanet
034 Costcutter, Bewsbury Cross Lane, Whitfield
035 Costcutter, Bywater Transport Pike Road Industrial Estate, Eythorne
036 Costcutter, Fleming Way, Folkestone
037 Costcutter, Hereson Road, Ramsgate
038 Costcutter, Island Road, Canterbury
039 Costcutter, King Street, Ramsgate
040 Costcutter, Pencester Road, Dover
041 Costcutter, Sandgate Road, Folkestone
042 Costcutter, Sheriden Road, Dover
043 Farm Foods, Charlton Green, Dover
044 Farm Foods, New Street, Ashford
045 Iceland, College Walk, Margate
046 Iceland, High Street, Broadstairs
047 Iceland, High Street, Dover
048 Iceland, High Street, Hythe
049 Iceland, King Street, Ramsgate
050 Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury
051 Iceland, Mortimer Street, Herne Bay
052 Iceland, Queen Street, Deal
053 Iceland, Sandgate Lane Shopping Centre, West Terrace, Folkestone
054 Lidl, Haven Drive, Hawkinge
055 Lidl, Margate Road, Ramsgate
056 Lidl, New Street, Ashford
057 Lidl, Shellons Street, Folkestone
058 Lidl, Sturry Road, Canterbury
059 M&S Simply Food, Maybrook Retail Park, Sturry Road, Canterbury
060 M&S, Biggin Street, Dover
061 M&S, High Street, Deal
062 M&S, St Georges Street, Canterbury
063 M&S, Westwood Cross Centre, Margate Road, Thanet
064 Morrisons, Beach Street, Herne Bay
065 Morrisons, Bridge Street, Dover
066 Morrisons, Cheriton Road, Folkestone
067 Morrisons, College Walk, Halwye Street, Margate
068 Morrisons, Ten Perch Road, Canterbury
069 Sainsbury's Local, St. Dunstans, Canterbury
070 Sainsbury's Local, St. Lawrence Ground, Old Dover Road, Canterbury
071 Sainsbury's Military Road, Hythe
072 Sainsbury's West Street, Deal
073 Sainsbury's, Kingsmead Road, Canterbury
074 Sainsbury's, Margate Road, Broadstairs
075 Sainsbury's, Park Farm Road, Folkestone
076 Sainsbury's, Simone Weil Avenue, Ashford
077 Sansbury's Bouverie Road West, Folkestone
078 Spar, Blackbull Road, Folkestone
079 Spar, Dover South Service St, Limekiln Street, Dover
080 Spar, Folkestone Road, Dover
081 Spar, Market Street, Sandwich
082 Spar, The Centre, Newington, Ramsgate
083 Spar, Townwall Street, Dover
084 Tesco Express, Canterbury Road, Hawkinge
085 Tesco Express, Castle House, Bouverie Road West, Folkestone
086 Tesco Express, Foord Road, Folkestone

087 Tesco Express, Hereson Road, Ramsgate
088 Tesco Express, Mace Lane, Ashford
089 Tesco Express, Mill Hill, Deal
090 Tesco Express, Railway Bell, Dover Road, Folkestone
091 Tesco Extra, Hythe Road, Wilesborough, Ashford
092 Tesco Extra, Margate Road, Westwood, Broadstairs
093 Tesco Extra, Millstrood Road, Whitstable
094 Tesco Extra, White Cliffs Business Park, Whitfield, Dover
095 Tesco Metro, High Street, Broadstairs
096 Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury
097 Tesco Superstore, Cheriton High Street, Folkestone
098 Tesco Superstore, Moat Field Meadow, Kingsnorth, Ashford
099 Tesco Supertore, Manston Road, Ramsgate
100 Waitrose, Prospect Road, Hythe
101 Waitrose, Queen Street, Ramsgate
102 Waitrose, Repton Park, Ashford
103 Waitrose, St. Georges Centre, Canterbury

Local Stores / Markets:

104 Ash - local stores
105 Capel-le-Ferne - local stores
106 Deal - local stores
107 Deal - markets
108 Dover - local stores
109 Dover - markets
110 Eastry - local stores
111 Sandwich - local stores
112 Sandwich - markets
113 Shepherdswell - local stores
114 Wingham - local stores

Others:

115 Internet / mail order / catalogue (PLEASE WRITE IN) GOTO Q07
116 Other (PLEASE WRITE IN)
117 (Don't know / varies)
118 (No other stores mentioned) GOTO Q07

Those who use another store to do their main food shopping at Q05 (excluding Internet shopping)

Q06 How often do you normally shop at (place mentioned at Q05)?
DO NOT READ OUT. ONE ANSWER ONLY.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Less often
6 (Varies)
7 (Don't know)

Q07 Where do you normally do most of your household's shopping for small scale 'top-up' food and convenience goods items (including newspapers, bread, milk and tobacco products)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:

001 Aldi, Boundary Road, Ramsgate
002 Aldi, Cherry Tree Avenue, Dover
003 Aldi, East Street, Sittingbourne
004 Aldi, High Street, Hythe
005 Aldi, Zion Place, Margate
006 Alldays, The Street, Ash
007 Asda Supercentre, Bouverie Place, Folkestone
008 Asda Supermarket, Charlton Green, Dover
009 Asda Superstore, Kimeberley Way, Ashford
010 Asda Superstore, Sturry Road, Canterbury
011 Asda Superstore, Westwood Road, Broadstairs
012 Budgens, Broadway Garage, Broadstairs
013 Budgens, St Lawrence, Ramsgate
014 Co-op, Beauchamp Avenue, Mill Hill, Deal
015 Co-op, Castle Street, Dover
016 Co-op, Cheriton Road, Folkestone
017 Co-op, Churchfield Way, Wye, Ashford
018 Co-op, Eythorne Road, Shepherdswell
019 Co-op, Grange Road, Ramsgate
020 Co-op, High Street, Cheriton, Folkestone
021 Co-op, High Street, Sturry, Canterbury
022 Co-op, Hopeville Avenue, St. Peters, Broadstairs
023 Co-op, Lord Warden, Hamilton Road, Deal
024 Co-op, Lower Road, River, Dover
025 Co-op, Main Road, Sellindge, Ashford
026 Co-op, Market Square, Aylesham
027 Co-op, Moat Sole Road, Sandwich
028 Co-op, Newington Road, Bush Parade, Ramsgate
029 Co-op, Park Street, Deal
030 Co-op, Queens Street, Deal
031 Co-op, Station Road, Birchington
032 Co-op, The Street, Ash
033 Co-op, Tothill Street, Minster, Thanet
034 Costcutter, Bewsbury Cross Lane, Whitfield
035 Costcutter, Bywater Transport Pike Road Industrial Estate, Eythorne
036 Costcutter, Fleming Way, Folkestone
037 Costcutter, Hereson Road, Ramsgate
038 Costcutter, Island Road, Canterbury
039 Costcutter, King Street, Ramsgate
040 Costcutter, Pencester Road, Dover
041 Costcutter, Sandgate Road, Folkestone
042 Costcutter, Sheriden Road, Dover
043 Farm Foods, Charlton Green, Dover
044 Farm Foods, New Street, Ashford
045 Iceland, College Walk, Margate
046 Iceland, High Street, Broadstairs
047 Iceland, High Street, Dover
048 Iceland, High Street, Hythe
049 Iceland, King Street, Ramsgate
050 Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury
051 Iceland, Mortimer Street, Herne Bay
052 Iceland, Queen Street, Deal
053 Iceland, Sandgate Lane Shopping Centre, West Terrace, Folkestone
054 Lidl, Haven Drive, Hawkinge
055 Lidl, Margate Road, Ramsgate
056 Lidl, New Street, Ashford
057 Lidl, Shellons Street, Folkestone
058 Lidl, Sturry Road, Canterbury
059 M&S Simply Food, Maybrook Retail Park, Sturry Road, Canterbury
060 M&S, Biggin Street, Dover
061 M&S, High Street, Deal
062 M&S, St Georges Street, Canterbury
063 M&S, Westwood Cross Centre, Margate Road, Thanet
064 Morrisons, Beach Street, Herne Bay
065 Morrisons, Bridge Street, Dover
066 Morrisons, Cheriton Road, Folkestone
067 Morrisons, College Walk, Halwye Street, Margate
068 Morrisons, Ten Perch Road, Canterbury
069 Sainsbury's Local, St. Dunstans, Canterbury
070 Sainsbury's Local, St. Lawrence Ground, Old Dover Road, Canterbury
071 Sainsbury's Military Road, Hythe
072 Sainsbury's West Street, Deal
073 Sainsbury's, Kingsmead Road, Canterbury
074 Sainsbury's, Margate Road, Broadstairs
075 Sainsbury's, Park Farm Road, Folkestone
076 Sainsbury's, Simone Weil Avenue, Ashford
077 Sansbury's Bouverie Road West, Folkestone
078 Spar, Blackbull Road, Folkestone
079 Spar, Dover South Service St, Limekiln Street, Dover
080 Spar, Folkestone Road, Dover
081 Spar, Market Street, Sandwich
082 Spar, The Centre, Newington, Ramsgate
083 Spar, Townwall Street, Dover

084 Tesco Express, Canterbury Road, Hawkinge
085 Tesco Express, Castle House, Bouverie Road West, Folkestone
086 Tesco Express, Foord Road, Folkestone
087 Tesco Express, Hereson Road, Ramsgate
088 Tesco Express, Mace Lane, Ashford
089 Tesco Express, Mill Hill, Deal
090 Tesco Express, Railway Bell, Dover Road, Folkestone
091 Tesco Extra, Hythe Road, Wilesborough, Ashford
092 Tesco Extra, Margate Road, Westwood, Broadstairs
093 Tesco Extra, Millstrood Road, Whitstable
094 Tesco Extra, White Cliffs Business Park, Whitfield, Dover
095 Tesco Metro, High Street, Broadstairs
096 Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury
097 Tesco Superstore, Cheriton High Street, Folkestone
098 Tesco Superstore, Moat Field Meadow, Kingsnorth, Ashford
099 Tesco Supertore, Manston Road, Ramsgate
100 Waitrose, Prospect Road, Hythe
101 Waitrose, Queen Street, Ramsgate
102 Waitrose, Repton Park, Ashford
103 Waitrose, St. Georges Centre, Canterbury

Local Stores / Markets:

104 Ash - local stores
105 Capel-le-Ferne - local stores
106 Deal - local stores
107 Deal - markets
108 Dover - local stores
109 Dover - markets
110 Eastry - local stores
111 Sandwich - local stores
112 Sandwich - markets
113 Shepherdswell - local stores
114 Wingham - local stores

Others:

115 Internet / mail order / catalogue (PLEASE WRITE IN)
116 Other (PLEASE WRITE IN)
117 (Don't know / varies)
118 (Don't do top-up food shopping)

Q08 When you go shopping for your main food goods, do you normally combine your trip with other activities or purchases?
DO NOT READ OUT. CAN BE MULTICODED.

1	Yes – non-food shopping	GO TO Q09
2	Yes – leisure activity	**GO TO Q10**
3	Yes – travelling to / from work	**GO TO Q11**
4	Yes – travelling to / from school / college	**GO TO Q11**
5	Yes - other food shopping	**GO TO Q11**
6	Yes – visiting services such as banks and other financial institutions	**GO TO Q11**
7	Yes - childcare / nursery / after school activity	**GO TO Q11**
8	Yes - other (PLEASE WRITE IN)	**GO TO Q11**
9	No	**GO TO Q11**
A	(Don’t know / varies)	**GO TO Q11**

Those who combine their main food shopping trip with non-food shopping at Q08

Q08 Where do you buy non-food goods when you combine it with your main food shopping?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:

001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury

Town Centres / Retail Parks / Shopping Centres:

010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store

Others:

044 In-store
045 Internet / mail order / catalogue (PLEASE WRITE IN)
046 Other (PLEASE WRITE IN)
047 (Don't know / can't remember / varies)

Q09

On last main food shop approximately what proportion of your total spend was on non-food items?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Less than 5%
2 5-10%
3 11-20%
4 21-30%
5 31-40%
6 41-50%
7 51-60%
8 61-70
9 71-80
A 81-90
B 91-100%
C (Don't know)

I would now like to ask you some more detaield questions about non-food shopping:

Q10 Where do you normally do most of your shopping for CLOTHING & FOOTWEAR ITEMS (womens, mens, childrens and baby - shoes including trainers, etc.)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q11 Where do you normally do most of your household's shopping for FURNITURE, CARPETS & OTHER FLOOR COVERINGS (such as beds, sofas, tables, fitted carpets, lights/lamps, pictures, bookshelves, baby furniture, camping and garden furniture, mirrors, etc)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q12 Where do you normally do most of your household's shopping for TEXTILES, CURTAINS, SOFT FURNISHINGS, BED SPREADS, ETC.
DO NOT READ OUT. ONE ANSWER ONLY

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q13 Where do you normally do most of your household's shopping for DIY, HARDWARE, DECORATING SUPPLIES, & MAJOR/SMALL HAND TOOLS ETC. (such as paint, varnish, cement, electric drills/hammers, sanders, hedge cutters, saws, hammers, lawn mowers, spades, door fittings, electric bulbs. electric batteries. etc)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q14 Where do you normally do most of your household's shopping for GARDENS, PLANTS & FLOWERS (such as natural & articificial flowers, bulbs, pots & pot holders, Xmas trees, etc - excludes gardening equipment & gardening tools)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
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014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
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027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q15 Where do you normally do most of your household's shopping for LARGE DOMESTIC APPLIANCES (such as fridges, washing machines, cookers, vacuum cleaners, sewing machines, etc)?

DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q16 Where do you normally do most of your household's shopping for SMALL DOMESTIC APPLIANCES (such as kettles, coffee machines, food mixers, irons, electric blankets, deep fryers, knives, toasters, etc)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
009 Homebase, Wincheap Industrial Estate, Canterbury
Town Centres / Retail Parks / Shopping Centres:
010 Ash - local store
011 Ashford - Retail Outlet
012 Ashford - Town Centre
013 Ashford - Warren Retail Park / Orbit Retail Park
014 Ashford - Other
015 Broadstairs - Town Centre
016 Broadstairs - Westwood Cross
017 Broadstairs - Other
018 Canterbury - Sturry Road Retail Park
019 Canterbury - Town Centre
020 Canterbury - Whitefriars Shopping Centre
021 Canterbury - Wincheap Retail Park
022 Canterbury - Other
023 Capel-le-Ferne - local store
024 Deal - Town Centre
025 Deal - Other (includes Hutchings Timber Yard (DIY)
026 Dover - Charlton Green (includes Halfords, Granville Street and Carpet Right)
027 Dover - De Braderlei Wharf Designer Outlet
028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q17 Where do you normally do most of your household's shopping for smaller AUDIO-VISUAL, PHOTOGRAPHIC & COMPUTER ITEMS, (such as stereos, radios, TVs, computers, laptops, printers, camcorders, cameras, telephones, MP3 players, ipods, EXCLUDES VIDEO GAMES & COMPUTER GAMES)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
007 Homebase, Dover Business Park, Dover
008 Homebase, Westwood Cross, Thanet
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017 Broadstairs - Other
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035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q18 Where do you normally do most of your household's shopping for CDs & DVDs etc - EXCLUDES VIDEO GAMES & COMPUTER GAMES)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
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035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q19 Where do you normally do most of your shopping for PERSONAL USE & CARE, INCLUDING MEDICAL GOODS, PHARMACEUTICAL PRODUCTS, THERAPEUTICAL PRODUCTS, & ELECTRIC/NON-ELECTRIC APPLIANCES FOR PERSONAL USE (eye glasses, contact lenses, medicine, electric/non electric razors, hair dryers, curling tongs, electric toothbrushes, soap, perfumes & deodorants, toilet paper, diposable babies' napkins, etc.)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
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032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don’t know / can’t remember / varies)
047 (Do not do this type of shopping)

Q20 Where do you normally do most of your household's shopping for GAMES, TOYS, HOBBIES, SPORTS, CAMPING & MUSICAL INSTRUMENTS (e.g. Pianos, guitars, table tennis/football/snooker tables, chess sets, soft toys, fireworks, electronic games, video games that plug into TV, video game software, fishing rods, tents, stoves, skis, etc...BUT EXCLUDES CAMPING & GARDEN FURNITURE).

DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
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018 Canterbury - Sturry Road Retail Park
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020 Canterbury - Whitefriars Shopping Centre
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022 Canterbury - Other
023 Capel-le-Ferne - local store
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028 Dover - The Charlton Centre
029 Dover - Town Centre
030 Dover - White Cliffs Business Park, Whitfield
031 Dover - Other (includes businesses in Coombe Valley)
032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q21 Where do you normally do most of your household's shopping for PETS & PET RELATED PRODUCTS (e.g. Pets, pet food, collars, fish tanks, cat litters, veterinary services, etc.)?
DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
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035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don’t know / can’t remember / varies)
047 (Do not do this type of shopping)

Q22 Where do you do most of your household's shopping for ALL OTHER NON-FOOD GOODS - INCLUDING BOOKS; STATIONERY; JEWELLERY, CLOCKS & WATCHES; GLASSWARE, TABLEWARE & NON-ELECTRIC HOUSEHOLD UTENSILS, TRAVEL GOODS, ARTICLES FOR BABIES, ETC. (includes suitcases, wallets, push-chairs, baby car seats, saucepans, containers for bread, laundry baskets, waste bins, writing pads, pens, paper punches, drawing and painting materials, etc.).

DO NOT READ OUT. ONE ANSWER ONLY.

Specific Stores:
001 B&Q, Honeywood Parkway, Whitfield
002 B&Q, Norman Road, Ashford
003 B&Q, Park Farm Road, Folkestone
004 B&Q, Sturry Road, Canterbury
005 B&Q, Westwood Industrial Estate, Enterprise Road, Margate
006 Homebase, Churchill Avenue, Folkestone
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008 Homebase, Westwood Cross, Thanet
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023 Capel-le-Ferne - local store
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030 Dover - White Cliffs Business Park, Whitfield
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032 Eastry - local store
033 Folkestone - Park Farm Retail Park
034 Folkestone - Town Centre (this should include Bouverie Place - TK Maxx / Asda / Primark)
035 Folkestone - Other
036 Margate - Town Centre
037 Margate - Other
038 Ramsgate - Town Centre
039 Ramsgate - Other
040 Sandwich - Town Centre
041 Sandwich - Other
042 Shepherdswell - local store
043 Wingham - local store
Others:
044 Internet / mail order / catalogue (PLEASE WRITE IN)
045 Other (PLEASE WRITE IN)
046 (Don't know / can't remember / varies)
047 (Do not do this type of shopping)

Q23 When you do your household's non-food shopping, how do you usually travel?
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
B Other (PLEASE WRITE IN)
C Not applicable / goods delivered
D (Don't know / varies)

Q24 What improvements to DOVER TOWN CENTRE, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED. CODE UP TO THREE RESPONSES ONLY.

1 Better disabled access
2 Better public transport
3 Better signposting
4 Park & ride facilities
5 More / better car parking
6 More traffic free pedestrianised streets
7 Fewer traffic free pedestrian streets
8 Cleaner streets
9 Better value for money / lower prices
A More / better higher quality shop offer
B Department Store
C Larger shops
D More/ better independent & specialist shops
E More/ better foodstores
F More/ better retail brands
G More / better non-food shops
H More / better fashion shops
I Shops and services open later in the evening
J Better policing / safer
K More / better cafés / restaurants
L More / better cultural facilities
M More / better entertainment facilities (e.g. Cinema)
N More / better events
O More better parks / green spaces
P More / better public houses
R Swimming pool
S Nothing
T Other (PLEASE WRITE IN)
U (Don't know)
V (Do not visit this centre)

Q25 What improvements to DEAL TOWN CENTRE, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED. CODE UP TO THREE RESPONSES ONLY.

1 Better disabled access
2 Better public transport
3 Better signposting
4 Park & ride facilities
5 More / better car parking
6 More traffic free pedestrianised streets
7 Fewer traffic free pedestrian streets
8 Cleaner streets
9 Better value for money / lower prices
A More / better higher quality shop offer
B Department Store
C Larger shops
D More/ better independent & specialist shops
E More/ better foodstores
F More/ better retail brands
G More / better non-food shops
H More / better fashion shops
I Shops and services open later in the evening
J Better policing / safer
K More / better cafés / restaurants
L More / better cultural facilities
M More / better entertainment facilities (e.g. Cinema)
N More / better events
O More better parks / green spaces
P More / better public houses
R Swimming pool
S Nothing
T Other (PLEASE WRITE IN)
U (Don't know)
V (Do not visit this centre)

Q26 What improvements to SANDWICH TOWN CENTRE, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED. CODE UP TO THREE RESPONSES ONLY.

1 Better disabled access
2 Better public transport
3 Better signposting
4 Park & ride facilities
5 More / better car parking
6 More traffic free pedestrianised streets
7 Fewer traffic free pedestrian streets
8 Cleaner streets
9 Better value for money / lower prices
A More / better higher quality shop offer
B Department Store
C Larger shops
D More/ better independent & specialist shops
E More/ better foodstores
F More/ better retail brands
G More / better non-food shops
H More / better fashion shops
I Shops and services open later in the evening
J Better policing / safer
K More / better cafés / restaurants
L More / better cultural facilities
M More / better entertainment facilities (e.g. Cinema)
N More / better events
O More better parks / green spaces
P More / better public houses
R Swimming pool
S Nothing
T Other (PLEASE WRITE IN)
U (Don't know)
V (Do not visit this centre)

Demographics: Please READ OUT Statement:

Finally, I would like to ask you a few questions about yourself and your household. These are for survey control purposes only and the results will not be released identifying you by name.

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)

OCC What is the occupation of the chief wage earner of the household?
DO NOT READ OUT. ONE ANSWER ONLY

1	Occupation (PLEASE WRITE IN)	GOTO WOR
2	Basic state pension ONLY	**GOTO ADU**
3	(Refused)	**GOTO ADU**

Those who are in employment at OCC:

WOR If you are in employment, where do you work?
DO NOT READ OUT. ONE ANSWER ONLY

1 (PLEASE WRITE IN)
2 (Varies)
3 (Don't know / can't remember)
4 (Not in employment)

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)

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)

ETH In order to gain a representative sample for the survey, could I ask which of these ethnic groups you consider yourself to belong to?
READ OUT. ONE ANSWER ONLY.

1 White British
2 White Irish
3 White other
4 Mixed white
5 Chinese or other
6 Asian, Asian British
7 Black, black British
8 Other (PLEASE WRITE IN)
9 (Refused)

Thank & close

Dover

GETTING THE MOST FROM YOUR GOAD CENTRE 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 and 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 Centre Report.

1. The Local Area
The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System
A simple indexing system appears thr oughout 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 st rong 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 t herefore 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 outle ts with the UK 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/Key Attractors
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 is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve t he consumer appeal of a centre).
The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffi c, (and therefore increased sales opportunities), multiples provide fierce co mpetition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports
Category reports allow you to com pare retail centres and breakdown the retail types to allow you to undertake detailed study.
The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provi des a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial / Business Services and Vacancy sectors.
Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area .

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This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.
Mosaic classifies individuals usi ng census, financial, housing and retail data. Combining this with the prof ile's information on local household composition and age structure enabl es you to understand the varied lifestyles and behaviours of individual customers. Y ou can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and gener ate greater brand loyalty.

Retail Planner
Retail Planner delivers clear, compr ehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:
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- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

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Shop Point
Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Dat abase, Experian's National Business Database. Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail in formation including: Fascia, address, floor space and co-ordinates.
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For further details on th ese products or if you have any queries regarding your Goad Centre Report, please contact Experian on:
Tel: 0845 601 6011
Fax: 0115 968 5003

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Experian™
A world of insight

Dover

Retail Composition

Survey Date: 12-May-11

Closest Centres	Distance (km)
Folkestone	10.6
Folkestone - Cheriton	12.2
Deal	12.5
Eurotunnel - UK Passenger Te	13.6
Sandwich	16.5

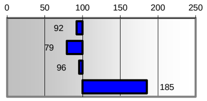
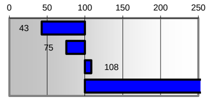
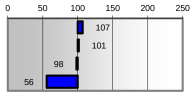
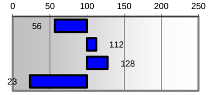
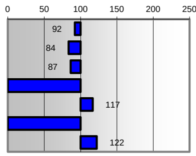
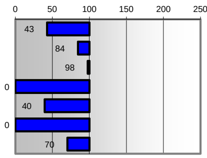
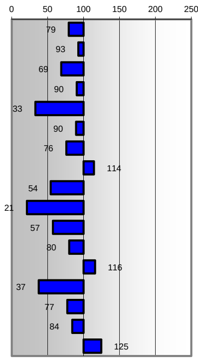
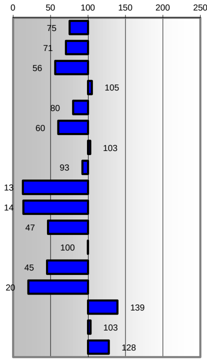
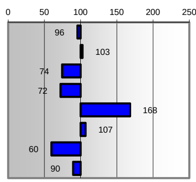
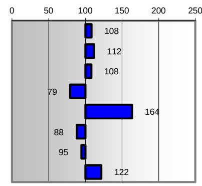
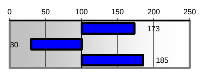
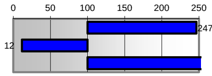
Key Retail Indicators

Total Outlets	293			
Total Floorspace (sq ft)	587,400			
	Count	**%**	**% UK**	**Index**
Vacant Outlets	74	25.26	13.64	185
Vacant Floorspace (sq ft)	188,900	32.16	12.07	266
Multiple Outlets	79	26.96	29.45	92
Comparison Outlets	96	32.76	41.35	79

Major Retailers

Argos	1	Next	0
BhS	0	O2	1
Boots The Chemist	1	Phones 4 U	1
Burton	1	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	0	Sainsburys	0
Clintons	1	Superdrug	1
Debenhams	0	T K Maxx	0
Dorothy Perkins	1	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	1
John Lewis	0	Waitrose	0
Marks & Spencer	1	Waterstones	0
New Look	1	WHSmith	1
		Wilkinsons	0

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	23	7.85	8.53	92	43,100	4,004	7.34	17.11	43
Comparison	96	32.76	41.35	79	205,900	19,129	35.05	46.43	75
Service	99	33.79	35.35	96	148,800	13,824	25.33	23.37	108
Vacant	74	25.26	13.64	185	188,900	17,549	32.16	12.07	266
Multiple Retailers by Trade Group									
Convenience	10	12.66	11.83	107	32,200	2,991	14.09	24.97	56
Comparison	43	54.43	53.64	101	142,300	13,220	62.28	55.41	112
Service	25	31.65	32.25	98	53,300	4,952	23.33	18.29	128
Miscellaneous	1	1.27	2.28	56	700	65	0.31	1.33	23
Retail Category									
Convenience	23	7.85	8.53	92	43,100	4,004	7.34	17.11	43
Bakers	5	1.71	2.04	84	5,100	474	0.87	1.03	84
Butchers	2	0.68	0.79	87	2,400	223	0.41	0.42	98
Greengrocers & fishmongers	0	0.00	0.60	0	0	0	0.00	1.27	0
Groceries & frozen foods	10	3.41	2.92	117	29,100	2,703	4.95	12.52	40
Off licences & home brew	0	0.00	0.50	0	0	0	0.00	0.31	0
CTN & convenience	6	2.05	1.67	122	6,500	604	1.11	1.57	70
Comparison	96	32.76	41.35	79	205,900	19,129	35.05	46.43	75
Footwear & repairs	5	1.71	1.84	93	5,400	502	0.92	1.30	71
Mens, boys wear	2	0.68	0.99	69	2,800	260	0.48	0.85	56
Womens, girls & childrens clothing	10	3.41	3.78	90	22,400	2,081	3.81	3.63	105
Mixed & general clothing	4	1.37	4.17	33	30,600	2,843	5.21	6.49	80
Furniture, carpets, textiles	9	3.07	3.43	90	13,700	1,273	2.33	3.87	60
Books, arts/crafts, stationers/copy	10	3.41	4.50	76	19,800	1,839	3.37	3.27	103
Elec, home ent, 'phones & video	13	4.44	3.88	114	16,600	1,542	2.83	3.05	93
DIY, hardware & household goods	4	1.37	2.52	54	3,700	344	0.63	4.76	13
Gifts, china, glass & leather goods	1	0.34	1.62	21	700	65	0.12	0.86	14
Cars, motor cycles & accessories	2	0.68	1.19	57	5,000	465	0.85	1.83	47
Chemists, toiletries & opticians	9	3.07	3.85	80	22,700	2,109	3.86	3.88	100
Variety, department & catalogue	2	0.68	0.59	116	16,500	1,533	2.81	6.20	45
Florists & gardens	1	0.34	0.91	37	500	46	0.09	0.42	20
Sports, toys, cycles & hobbies	5	1.71	2.21	77	19,900	1,849	3.39	2.43	139
Jewellers, clocks & repairs	5	1.71	2.03	84	5,600	520	0.95	0.92	103
Charity, pets & other comparison	14	4.78	3.84	125	20,000	1,858	3.40	2.66	128
Service	99	33.79	35.35	96	148,800	13,824	25.33	23.37	108
Restaurants, cafes, fast food	48	16.38	15.95	103	73,100	6,791	12.44	11.11	112
Hairdressing, beauty & health	19	6.48	8.72	74	26,300	2,443	4.48	4.14	108
Launderettes & dry cleaners	2	0.68	0.95	72	2,000	186	0.34	0.43	79
Travel agents	6	2.05	1.22	168	7,000	650	1.19	0.73	164
Banks & financial services	13	4.44	4.16	107	22,800	2,118	3.88	4.40	88
Building societies	1	0.34	0.57	60	2,600	242	0.44	0.47	95
Estate agents & auctioneers	10	3.41	3.80	90	15,000	1,394	2.55	2.10	122
Miscellaneous	75	25.60	14.77	173	189,600	17,614	32.28	13.09	247
Employment, careers, POs & info	1	0.34	1.14	30	700	65	0.12	1.02	12
Vacant	74	25.26	13.64	185	188,900	17,549	32.16	12.07	266

For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

Deal

GETTING THE MOST FROM YOUR GOAD CENTRE 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 and 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 Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

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

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Comparing the number of vacant outlets with the UK 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.

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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 is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre).
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Deal

Survey Date: 06-Jan-12

Closest Centres	Distance (km)
Sandwich	7.1
Ramsgate	12.3
Dover	12.5
Westwood Cross	15.1
Broadstairs	15.2

Key Retail Indicators

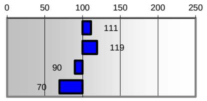
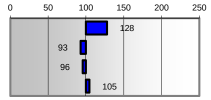
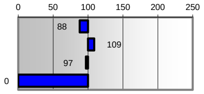
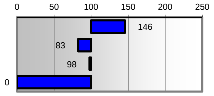
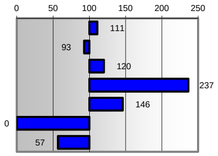
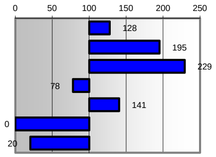
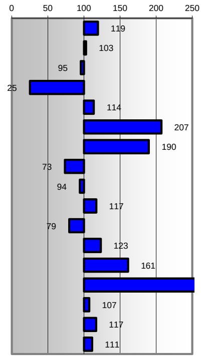
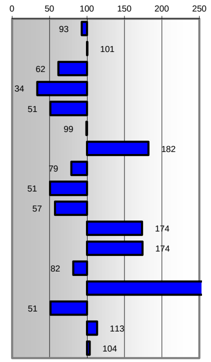
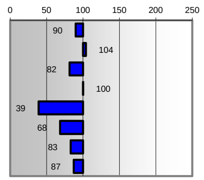
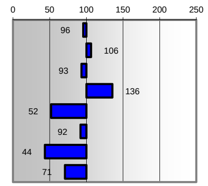
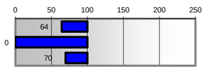
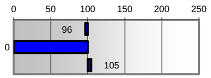
Total Outlets	211			
Total Floorspace (sq ft)	344,000			
	Count	**%**	**% UK**	**Index**
Vacant Outlets	20	9.48	13.64	70
Vacant Floorspace (sq ft)	43,400	12.62	12.07	105
Multiple Outlets	48	22.75	29.45	77
Comparison Outlets	104	49.29	41.35	119

Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	2	Phones 4 U	1
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	1	Sainsburys	1
Clintons	1	Superdrug	1
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	1	Waterstones	0
New Look	1	WHSmith	1
		Wilkinsons	0

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	20	9.48	8.53	111	75,200	6,986	21.86	17.11	128
Comparison	104	49.29	41.35	119	148,400	13,787	43.14	46.43	93
Service	67	31.75	35.35	90	77,000	7,154	22.38	23.37	96
Vacant	20	9.48	13.64	70	43,400	4,032	12.62	12.07	105
Multiple Retailers by Trade Group									
Convenience	5	10.42	11.83	88	58,600	5,444	36.37	24.97	146
Comparison	28	58.33	53.64	109	73,700	6,847	45.75	55.41	83
Service	15	31.25	32.25	97	28,800	2,676	17.88	18.29	98
Miscellaneous	0	0.00	2.28	0	0	0	0.00	1.33	0
Retail Category									
Convenience	20	9.48	8.53	111	75,200	6,986	21.86	17.11	128
Bakers	4	1.90	2.04	93	6,900	641	2.01	1.03	195
Butchers	2	0.95	0.79	120	3,300	307	0.96	0.42	229
Greengrocers & fishmongers	3	1.42	0.60	237	3,400	316	0.99	1.27	78
Groceries & frozen foods	9	4.27	2.92	146	60,500	5,621	17.59	12.52	141
Off licences & home brew	0	0.00	0.50	0	0	0	0.00	0.31	0
CTN & convenience	2	0.95	1.67	57	1,100	102	0.32	1.57	20
Comparison	104	49.29	41.35	119	148,400	13,787	43.14	46.43	93
Footwear & repairs	4	1.90	1.84	103	4,500	418	1.31	1.30	101
Mens, boys wear	2	0.95	0.99	95	1,800	167	0.52	0.85	62
Womens, girls & childrens clothing	2	0.95	3.78	25	4,200	390	1.22	3.63	34
Mixed & general clothing	10	4.74	4.17	114	11,400	1,059	3.31	6.49	51
Furniture, carpets, textiles	15	7.11	3.43	207	13,200	1,226	3.84	3.87	99
Books, arts/crafts, stationers/copy	18	8.53	4.50	190	20,500	1,905	5.96	3.27	182
Elec, home ent, 'phones & video	6	2.84	3.88	73	8,300	771	2.41	3.05	79
DIY, hardware & household goods	5	2.37	2.52	94	8,300	771	2.41	4.76	51
Gifts, china, glass & leather goods	4	1.90	1.62	117	1,700	158	0.49	0.86	57
Cars, motor cycles & accessories	2	0.95	1.19	79	10,900	1,013	3.17	1.83	174
Chemists, toiletries & opticians	10	4.74	3.85	123	23,200	2,155	6.74	3.88	174
Variety, department & catalogue	2	0.95	0.59	161	17,400	1,617	5.06	6.20	82
Florists & gardens	5	2.37	0.91	260	5,600	520	1.63	0.42	392
Sports, toys, cycles & hobbies	5	2.37	2.21	107	4,300	399	1.25	2.43	51
Jewellers, clocks & repairs	5	2.37	2.03	117	3,600	334	1.05	0.92	113
Charity, pets & other comparison	9	4.27	3.84	111	9,500	883	2.76	2.66	104
Service	67	31.75	35.35	90	77,000	7,154	22.38	23.37	96
Restaurants, cafes, fast food	35	16.59	15.95	104	40,700	3,781	11.83	11.11	106
Hairdressing, beauty & health	15	7.11	8.72	82	13,300	1,236	3.87	4.14	93
Launderettes & dry cleaners	2	0.95	0.95	100	2,000	186	0.58	0.43	136
Travel agents	1	0.47	1.22	39	1,300	121	0.38	0.73	52
Banks & financial services	6	2.84	4.16	68	13,900	1,291	4.04	4.40	92
Building societies	1	0.47	0.57	83	700	65	0.20	0.47	44
Estate agents & auctioneers	7	3.32	3.80	87	5,100	474	1.48	2.10	71
Miscellaneous	20	9.48	14.77	64	43,400	4,032	12.62	13.09	96
Employment, careers, POs & info	0	0.00	1.14	0	0	0	0.00	1.02	0
Vacant	20	9.48	13.64	70	43,400	4,032	12.62	12.07	105

For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

Sandwich

GETTING THE MOST FROM YOUR GOAD CENTRE 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 and 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 Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

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 UK 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/Key Attractors

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 is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre).
The presence of multiple outlets and key attractors 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 Category Reports

Category reports allow you to compare retail centres and breakdown the retail types to allow you to undertake detailed study.
The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial / Business Services and Vacancy sectors.
Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area .

The Goad Catchment Profile

This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.
Mosaic classifies individuals using census, financial, housing and retail data. Combining this with the profile's information on local household composition and age structure enables you to understand the varied lifestyles and behaviours of individual customers. You can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and generate greater brand loyalty.

Retail Planner

Retail Planner delivers clear, comprehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:

- Estimate future spending on retail goods and leisure services
- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

Goad Network

A Goad plan provides a birds-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access the service at
http://www.goadnetwork.co.uk

Historic Plans

Historic Goad plans dating back to 1968 are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads

Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

Demographics Online

DOL is the one stop shop for organisations requiring a quick, clear and actionable source of on-line demographic data that helps clients analyse existing and potential retail locations. Our DOL service provides clients with access to UK census data, and award winning market segmentation data in simple, easy to read, local area information reports specified by you. The report packs include sections on population statistics, age analysis, employment data and many others. The interactive mapping section allows you to map drive-times around your locations and view your customers. Our off the shelf reports include maps , charts and tables to help your understanding; or tailor the data to meet your own requirements. Subscription is for a year and usage is unlimited!

Shop Point

Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database. Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail information including: Fascia, address, floor space and co-ordinates.

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For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:
Tel: 0845 601 6011
Fax: 0115 968 5003

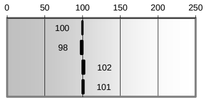
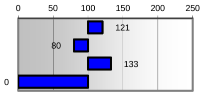
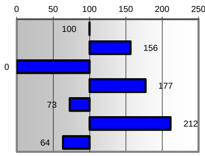
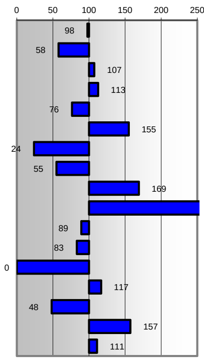
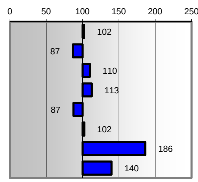
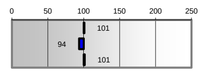
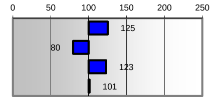
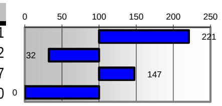
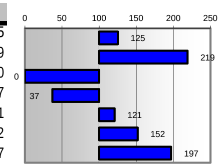
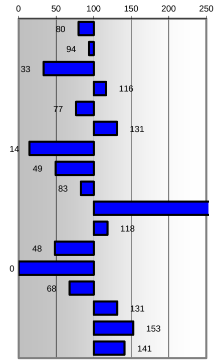
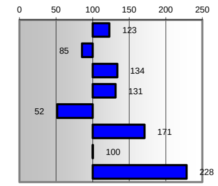
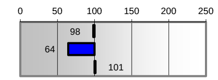
E-mail: goad.sales@uk.experian.com

Experian™
A world of insight

Sandwich

Retail Composition

	Outlets Number	%	% UK	Index	sq.ft	sq.m	Floorspace %	% UK	Index
Retail Trade Group									
Convenience	8	8.51	8.53	100	22,800	2,118	21.41	17.11	125
Comparison	38	40.43	41.35	98	39,400	3,660	37.00	46.43	80
Service	34	36.17	35.35	102	30,600	2,843	28.73	23.37	123
Vacant	13	13.83	13.64	101	13,000	1,208	12.21	12.07	101
Multiple Retailers by Trade Group									
Convenience	2	14.29	11.83	121	18,200	1,691	55.15	24.97	221
Comparison	6	42.86	53.64	80	5,900	548	17.88	55.41	32
Service	6	42.86	32.25	133	8,900	827	26.97	18.29	147
Miscellaneous	0	0.00	2.28	0	0	0	0.00	1.33	0
Retail Category									
Convenience	8	8.51	8.53	100	22,800	2,118	21.41	17.11	125
Bakers	3	3.19	2.04	156	2,400	223	2.25	1.03	219
Butchers	0	0.00	0.79	0	0	0	0.00	0.42	0
Greengrocers & fishmongers	1	1.06	0.60	177	500	46	0.47	1.27	37
Groceries & frozen foods	2	2.13	2.92	73	16,100	1,496	15.12	12.52	121
Off licences & home brew	1	1.06	0.50	212	500	46	0.47	0.31	152
CTN & convenience	1	1.06	1.67	64	3,300	307	3.10	1.57	197
Comparison	38	40.43	41.35	98	39,400	3,660	37.00	46.43	80
Footwear & repairs	1	1.06	1.84	58	1,300	121	1.22	1.30	94
Mens, boys wear	1	1.06	0.99	107	300	28	0.28	0.85	33
Womens, girls & childrens clothing	4	4.26	3.78	113	4,500	418	4.23	3.63	116
Mixed & general clothing	3	3.19	4.17	76	5,300	492	4.98	6.49	77
Furniture, carpets, textiles	5	5.32	3.43	155	5,400	502	5.07	3.87	131
Books, arts/crafts, stationers/copy	1	1.06	4.50	24	500	46	0.47	3.27	14
Elec, home ent, 'phones & video	2	2.13	3.88	55	1,600	149	1.50	3.05	49
DIY, hardware & household goods	4	4.26	2.52	169	4,200	390	3.94	4.76	83
Gifts, china, glass & leather goods	4	4.26	1.62	263	2,800	260	2.63	0.86	305
Cars, motor cycles & accessories	1	1.06	1.19	89	2,300	214	2.16	1.83	118
Chemists, toiletries & opticians	3	3.19	3.85	83	2,000	186	1.88	3.88	48
Variety, department & catalogue	0	0.00	0.59	0	0	0	0.00	6.20	0
Florists & gardens	1	1.06	0.91	117	300	28	0.28	0.42	68
Sports, toys, cycles & hobbies	1	1.06	2.21	48	3,400	316	3.19	2.43	131
Jewellers, clocks & repairs	3	3.19	2.03	157	1,500	139	1.41	0.92	153
Charity, pets & other comparison	4	4.26	3.84	111	4,000	372	3.76	2.66	141
Service	34	36.17	35.35	102	30,600	2,843	28.73	23.37	123
Restaurants, cafes, fast food	13	13.83	15.95	87	10,100	938	9.48	11.11	85
Hairdressing, beauty & health	9	9.57	8.72	110	5,900	548	5.54	4.14	134
Launderettes & dry cleaners	1	1.06	0.95	113	600	56	0.56	0.43	131
Travel agents	1	1.06	1.22	87	400	37	0.38	0.73	52
Banks & financial services	4	4.26	4.16	102	8,000	743	7.51	4.40	171
Building societies	1	1.06	0.57	186	500	46	0.47	0.47	100
Estate agents & auctioneers	5	5.32	3.80	140	5,100	474	4.79	2.10	228
Miscellaneous	14	14.89	14.77	101	13,700	1,273	12.86	13.09	98
Employment, careers, POs & info	1	1.06	1.14	94	700	65	0.66	1.02	64
Vacant	13	13.83	13.64	101	13,000	1,208	12.21	12.07	101

Survey Date: 28-Sep-11

Closest Centres	Distance (km)
Deal	7.1
Ramsgate	8.6
Westwood Cross	10.2
Birchington	11.4
Broadstairs	11.6

Key Retail Indicators

Total Outlets	94
Total Floorspace (sq ft)	106,500

	Count	%	% UK	Index
Vacant Outlets	13	13.83	13.64	101
Vacant Floorspace (sq ft)	13,000	12.21	12.07	101
Multiple Outlets	14	14.89	29.45	51
Comparison Outlets	38	40.43	41.35	98

Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	1	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	0
		Wilkinsons	0

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goad Centre Report

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Convenience Goods 2012 Market Share Analysis

TABLE 1: CONVENIENCE GOODS MARKET SHARE (% and £m)

	Market Share (%)									Trade Draw (£m, in 2010 prices)								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
Total Convenience Expenditure	**£41.3**	**£28.9**	**£16.1**	**£25.3**	**£30.8**	**£28.1**	**£25.6**	**£31.9**	**£228.0**									
DOVER SUB REGIONAL CENTRE																		
M&S, Biggin Street	5.6%	2.6%	3.4%	0.0%	0.0%	0.0%	0.3%	2.3%	1.9%	£2.3	£0.7	£0.6	£0.0	£0.0	£0.0	£0.1	£0.7	£4.4
Iceland, High Street	1.7%	2.7%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Co-Op, Castle Street	4.1%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	£1.7	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Other Convenience Stores	2.3%	1.4%	1.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%	£0.9	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.6
Subtotal In Centre	12.0%	4.7%	5.0%	0.0%	0.0%	0.0%	0.3%	2.5%	3.5%	£5.0	£1.3	£0.8	£0.0	£0.0	£0.0	£0.1	£0.8	£8.0
Iceland, High Street	1.7%	2.7%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Subtotal Edge of Centre	1.7%	2.7%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Morrisons, Bridge Street, Dover	40.9%	28.0%	18.8%	5.3%	3.3%	3.4%	3.9%	4.0%	14.7%	£16.9	£8.1	£3.0	£1.3	£1.0	£0.9	£1.0	£1.3	£33.6
Aldi, Cherry Tree Avenue, Dover	5.3%	6.4%	5.8%	1.0%	1.5%	0.0%	1.5%	0.5%	2.7%	£2.2	£1.8	£0.9	£0.2	£0.5	£0.0	£0.4	£0.2	£6.2
Asda Supermarket, Charlton Green, Dover	3.6%	0.3%	0.6%	0.3%	0.7%	0.6%	0.7%	0.3%	1.0%	£1.5	£0.1	£0.1	£0.1	£0.2	£0.2	£0.2	£0.1	£2.4
Tesco Extra, White Cliffs Business Park, Dover	27.7%	48.6%	33.7%	17.8%	6.9%	12.3%	24.6%	14.0%	22.7%	£11.4	£14.1	£5.4	£4.5	£2.1	£3.5	£6.3	£4.5	£51.8
Farm Foods, Charlton Green, Dover	1.2%	0.8%	0.9%	0.0%	0.7%	0.5%	0.0%	0.3%	0.6%	£0.5	£0.2	£0.1	£0.0	£0.2	£0.1	£0.0	£0.1	£1.3
Co-op, Lower Road, River, Dover	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.2
Costcutter, Sheriden Road, Dover	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Temple Ewelle, Local Stores	0.0%	0.3%	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	£0.0	£0.0	£0.1
Whitfield, Local Stores (excluding Whitecliffs)	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Subtotal Out of Centre	78.8%	89.2%	59.8%	24.3%	13.0%	16.8%	30.8%	19.6%	42.5%	£32.6	£25.8	£9.6	£6.2	£4.0	£4.7	£7.9	£6.2	£97.0
DEAL DISTRICT CENTRE																		
Co-Op, Park Street	0.0%	0.0%	1.7%	4.9%	9.1%	1.3%	0.0%	0.0%	2.1%	£0.0	£0.0	£0.3	£1.2	£2.8	£0.4	£0.0	£0.0	£4.7
Iceland, Queen Street	0.0%	0.0%	0.3%	6.5%	3.7%	0.9%	0.3%	0.0%	1.4%	£0.0	£0.0	£0.1	£1.7	£1.1	£0.3	£0.1	£0.0	£3.2
M&S, High Street, Deal	0.0%	0.0%	2.2%	5.6%	5.4%	0.0%	0.0%	0.0%	1.5%	£0.0	£0.0	£0.4	£1.4	£1.7	£0.0	£0.0	£0.0	£3.4
Other Convenience Stores	0.3%	0.0%	0.9%	2.1%	6.2%	0.0%	0.3%	0.0%	1.2%	£0.1	£0.0	£0.2	£0.5	£1.9	£0.0	£0.1	£0.0	£2.8
Subtotal In Centre	0.3%	0.0%	5.1%	19.2%	24.5%	2.3%	0.6%	0.0%	6.2%	£0.1	£0.0	£0.8	£4.9	£7.5	£0.6	£0.1	£0.0	£14.1
Sainsbury's West Street, Deal	0.0%	1.0%	19.6%	38.6%	54.1%	12.1%	0.7%	0.3%	14.7%	£0.0	£0.3	£3.1	£9.8	£16.6	£3.4	£0.2	£0.1	£33.5
Subtotal Edge of Centre	0.0%	1.0%	19.6%	38.6%	54.1%	12.1%	0.7%	0.3%	14.7%	£0.0	£0.3	£3.1	£9.8	£16.6	£3.4	£0.2	£0.1	£33.5
Walmer, Local Stores	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
Co-op, Beauchamp Avenue, Mill Hill, Deal	0.0%	0.0%	0.3%	5.4%	1.4%	1.2%	0.0%	0.0%	1.0%	£0.0	£0.0	£0.1	£1.4	£0.4	£0.3	£0.0	£0.0	£2.2
Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	1.0%	0.3%	1.5%	0.0%	0.0%	0.0%	0.3%	£0.0	£0.0	£0.2	£0.1	£0.5	£0.0	£0.0	£0.0	£0.7
Tesco Express, Mill Hill, Deal	0.0%	0.0%	0.6%	5.4%	0.2%	0.0%	0.0%	0.0%	0.7%	£0.0	£0.0	£0.1	£1.4	£0.1	£0.0	£0.0	£0.0	£1.5
Subtotal Out of Centre	0.0%	0.0%	1.9%	11.6%	3.2%	1.2%	0.0%	0.0%	2.0%	£0.0	£0.0	£0.3	£2.9	£1.0	£0.3	£0.0	£0.0	£4.6
SANDWICH RURAL SERVICE CENTRE																		
Other Convenience Stores	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.6%	0.0%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£0.0	£1.7
Subtotal In Centre	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.6%	0.0%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£0.0	£1.7
Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.6%	0.0%	0.0%	23.1%	0.8%	0.0%	3.0%	£0.0	£0.0	£0.1	£0.0	£0.0	£6.5	£0.2	£0.0	£6.8
Subtotal Edge of Centre	0.0%	0.0%	0.6%	0.0%	0.0%	23.1%	0.8%	0.0%	3.0%	£0.0	£0.0	£0.1	£0.0	£0.0	£6.5	£0.2	£0.0	£6.8
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE																		
Co-Op, Market Square	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	7.8%	0.0%	0.9%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.0	£0.0	£2.1
Other Convenience Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal In Centre	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	8.1%	0.0%	0.9%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.1	£0.0	£2.1
LOCAL CENTRES																		
Ash	0.0%	0.0%	0.0%	0.0%	0.3%	2.2%	0.3%	0.0%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.1	£0.0	£0.8
Capel-le-Ferne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.5
Shepherdswell	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	3.7%	0.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£1.2	£1.4
Wingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.3%	0.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£1.1
Subtotal	0.0%	0.0%	0.0%	0.0%	0.3%	4.1%	4.9%	4.2%	1.7%	£0.0	£0.0	£0.0	£0.0	£0.1	£1.2	£1.3	£1.3	£3.9
VILLAGES AND HAMLETS	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.3%	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.6
TOTAL INSIDE DISTRICT (RETENTION)	**92.7%**	**97.5%**	**95.8%**	**94.0%**	**95.3%**	**65.1%**	**47.0%**	**26.6%**	**76.3%**	**£38.3**	**£28.2**	**£15.4**	**£23.8**	**£29.3**	**£18.3**	**£12.0**	**£8.5**	**£173.8**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Westwood Cross	0.0%	0.0%	1.4%	1.7%	2.7%	13.6%	1.9%	0.7%	2.6%	£0.0	£0.0	£0.2	£0.4	£0.8	£3.8	£0.5	£0.2	£6.0
Canterbury	0.9%	1.5%	2.2%	2.0%	1.1%	10.7%	46.9%	17.0%	9.8%	£0.4	£0.4	£0.4	£0.5	£0.3	£3.0	£12.0	£5.4	£22.4
Folkestone	6.2%	0.8%	0.3%	0.0%	0.9%	0.0%	0.5%	42.8%	7.4%	£2.5	£0.2	£0.0	£0.0	£0.3	£0.0	£0.1	£13.6	£16.9
Hawkinge	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.7%	10.2%	1.6%	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.3	£3.6
Hythe	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.3%	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8
Ramsgate	0.0%	0.0%	0.0%	0.7%	0.0%	9.1%	1.0%	0.0%	1.3%	£0.0	£0.0	£0.0	£0.2	£0.0	£2.6	£0.2	£0.0	£3.0
All other shops and stores	0.0%	0.0%	0.3%	1.0%	0.0%	1.5%	1.9%	0.8%	0.6%	£0.0	£0.0	£0.1	£0.2	£0.0	£0.4	£0.5	£0.3	£1.5
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**7.3%**	**2.5%**	**4.2%**	**6.0%**	**4.7%**	**34.9%**	**53.0%**	**73.4%**	**23.7%**	**£3.0**	**£0.7**	**£0.7**	**£1.5**	**£1.5**	**£9.8**	**£13.5**	**£23.4**	**£54.1**
TOTAL MARKET SHARE	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£41.3**	**£28.9**	**£16.1**	**£25.3**	**£30.8**	**£28.1**	**£25.6**	**£31.9**	**£228.0**

Source: Strategic Perspectives HTIS June 2012, which asked where respondents normally undertake their main food, secondary food and top-up shopping.

Notes: Assumption that total convenience spend is divided between main food shopping (65%), secondary food shopping (10%) and top-up shopping (25%).

strategicperspecti>es

Comparison Goods 2012 Market Share Analysis

TABLE 1: COMPARISON GOODS MARKET SHARES: ALL COMPARISON GOODS

Market Share (%)

CENTRE / SHOPPING LOCATION	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL EXPENDITURE:	**£54.1**	**£39.3**	**£23.0**	**£35.4**	**£42.8**	**£39.4**	**£36.0**	**£48.6**	**£318.7**
DOVER SUB REGIONAL CENTRE									
In Centre	42.8%	30.0%	16.6%	6.8%	5.3%	3.7%	4.6%	6.3%	15.6%
Edge of Centre									
Charlton Centre, Dover	1.2%	0.7%	1.0%	0.3%	0.1%	0.0%	0.1%	0.2%	0.4%
De Braderlei Wharf Designer Outlet, Dover	1.5%	1.0%	0.8%	0.0%	0.4%	0.0%	0.0%	0.8%	0.6%
Out of Centre									
White Cliffs Business Park, Whitfield	11.1%	16.5%	10.3%	9.0%	3.9%	4.0%	6.8%	6.3%	8.4%
B&Q, Honeywood Parkway, Whitfield	6.5%	6.6%	6.9%	5.1%	4.8%	3.4%	2.5%	0.9%	4.5%
Other Stores, Dover	0.4%	1.0%	0.4%	0.6%	0.1%	0.3%	0.6%	0.6%	0.5%
DEAL DISTRICT CENTRE									
In Centre	0.6%	0.5%	15.7%	26.3%	38.0%	9.4%	0.6%	0.6%	10.6%
Out of Centre	0.0%	0.0%	1.6%	2.4%	3.5%	0.6%	0.1%	0.5%	1.0%
SANDWICH RURAL SERVICE CENTRE	0.0%	0.6%	0.4%	0.5%	0.1%	11.6%	0.8%	0.0%	1.7%
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.3%
LOCAL CENTRES	0.0%	0.4%	0.5%	0.1%	0.0%	3.1%	1.9%	0.3%	0.7%
VILLAGES AND HAMLETS	0.0%	0.1%	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%
TOTAL INSIDE DISTRICT (RETENTION)	**64.1%**	**57.2%**	**54.9%**	**51.5%**	**56.2%**	**36.1%**	**20.7%**	**16.5%**	**44.5%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	2.8%	2.2%	0.6%	0.8%	0.5%	0.4%	0.4%	4.2%	1.7%
Westwood Cross	2.8%	5.6%	7.2%	23.0%	22.3%	31.1%	11.3%	0.2%	12.4%
Canterbury	15.5%	24.3%	30.5%	17.8%	16.7%	23.8%	61.8%	34.4%	27.2%
Folkestone	12.7%	8.4%	4.3%	1.4%	0.8%	0.2%	0.8%	42.7%	10.4%
Greenhithe	0.0%	0.0%	0.7%	0.2%	0.2%	0.3%	0.5%	0.2%	0.2%
Margate	0.7%	0.4%	1.2%	1.3%	0.6%	1.8%	0.3%	0.0%	0.8%
Ramsgate	0.0%	0.0%	0.0%	1.2%	0.8%	2.8%	0.9%	0.1%	0.7%
Thanet	0.0%	0.0%	0.0%	0.0%	1.2%	1.3%	0.3%	0.0%	0.4%
All other shops and stores	1.3%	1.9%	0.7%	2.8%	0.7%	2.1%	3.0%	1.6%	1.8%
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**35.9%**	**42.8%**	**45.1%**	**48.5%**	**43.8%**	**63.9%**	**79.3%**	**83.5%**	**55.5%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Market Share (£m)

CENTRE / SHOPPING LOCATION	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
DOVER SUB REGIONAL CENTRE									
In Centre	£23.2	£11.8	£3.8	£2.4	£2.2	£1.5	£1.7	£3.0	£49.6
Edge of Centre									
Charlton Centre, Dover	£0.6	£0.3	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£1.4
De Braderlei Wharf Designer Outlet, Dover	£0.8	£0.4	£0.2	£0.0	£0.2	£0.0	£0.0	£0.4	£2.0
Out of Centre									
White Cliffs Business Park, Whitfield	£6.0	£6.5	£2.4	£3.2	£1.7	£1.6	£2.5	£3.1	£26.8
B&Q, Honeywood Parkway, Whitfield	£3.5	£2.6	£1.6	£1.8	£2.1	£1.3	£0.9	£0.4	£14.3
Other Stores, Dover	£0.2	£0.4	£0.1	£0.2	£0.1	£0.1	£0.2	£0.3	£1.6
DEAL DISTRICT CENTRE									
In Centre	£0.3	£0.2	£3.6	£9.3	£16.3	£3.7	£0.2	£0.3	£33.9
Out of Centre	£0.0	£0.0	£0.4	£0.9	£1.5	£0.2	£0.0	£0.2	£3.2
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.2	£0.1	£0.2	£0.1	£4.6	£0.3	£0.0	£5.4
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£1.0
LOCAL CENTRES	£0.0	£0.1	£0.1	£0.0	£0.0	£1.2	£0.7	£0.2	£2.4
VILLAGES AND HAMLETS	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3
TOTAL INSIDE DISTRICT (RETENTION)	**£34.6**	**£22.5**	**£12.6**	**£18.2**	**£24.0**	**£14.2**	**£7.5**	**£8.0**	**£141.8**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	£1.5	£0.9	£0.1	£0.3	£0.2	£0.2	£0.1	£2.1	£5.4
Westwood Cross	£1.5	£2.2	£1.6	£8.1	£9.6	£12.2	£4.1	£0.1	£39.5
Canterbury	£8.4	£9.5	£7.0	£6.3	£7.1	£9.4	£22.3	£16.7	£86.7
Folkestone	£6.9	£3.3	£1.0	£0.5	£0.4	£0.1	£0.3	£20.8	£33.1
Greenhithe	£0.0	£0.0	£0.2	£0.1	£0.1	£0.1	£0.2	£0.1	£0.7
Margate	£0.4	£0.1	£0.3	£0.5	£0.3	£0.7	£0.1	£0.0	£2.4
Ramsgate	£0.0	£0.0	£0.0	£0.4	£0.3	£1.1	£0.3	£0.0	£2.2
Thanet	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5	£0.1	£0.0	£1.1
All other shops and stores	£0.7	£0.8	£0.2	£1.0	£0.3	£0.8	£1.1	£0.8	£5.6
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**£19.4**	**£16.8**	**£10.4**	**£17.2**	**£18.8**	**£25.2**	**£28.6**	**£40.6**	**£176.9**
TOTAL	**£54.1**	**£39.3**	**£23.0**	**£35.4**	**£42.8**	**£39.4**	**£36.0**	**£48.6**	**£318.7**

Comparison Goods 2012 Market Share Analysis

TABLE 2: COMPARISON GOODS MARKET SHARES: CLOTHING & FOOTWEAR

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£12.7**	**£8.8**	**£4.8**	**£7.6**	**£9.2**	**£8.1**	**£7.6**	**£10.7**	**£69.6**									
DOVER SUB REGIONAL CENTRE																		
In Centre	27.3%	20.8%	11.0%	5.8%	2.4%	4.7%	5.6%	4.4%	11.2%	£3.5	£1.8	£0.5	£0.4	£0.2	£0.4	£0.4	£0.5	£7.8
Edge of Centre																		
Charlton Centre, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
De Braderlei Wharf Designer Outlet, Dover	5.7%	3.9%	3.7%	0.0%	1.2%	0.0%	0.0%	3.3%	2.5%	£0.7	£0.3	£0.2	£0.0	£0.1	£0.0	£0.0	£0.4	£1.7
Out of Centre																		
White Cliffs Business Park, Whitfield	0.0%	2.6%	0.0%	2.3%	1.2%	1.2%	1.1%	1.1%	1.2%	£0.0	£0.2	£0.0	£0.2	£0.1	£0.1	£0.1	£0.1	£0.8
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 Stores, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE																		
In Centre	0.0%	0.0%	11.0%	17.4%	27.7%	10.6%	0.0%	1.1%	7.7%	£0.0	£0.0	£0.5	£1.3	£2.5	£0.9	£0.0	£0.1	£5.4
Out of 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	£0.0	£0.0
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	1.2%	0.0%	0.0%	2.4%	1.1%	0.0%	0.5%	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2	£0.1	£0.0	£0.3
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**33.0%**	**27.3%**	**26.8%**	**25.6%**	**32.5%**	**18.8%**	**7.9%**	**10.0%**	**23.0%**	**£4.2**	**£2.4**	**£1.3**	**£1.9**	**£3.0**	**£1.5**	**£0.6**	**£1.1**	**£16.0**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	5.7%	3.9%	2.4%	2.3%	2.4%	1.2%	1.1%	8.9%	3.9%	£0.7	£0.3	£0.1	£0.2	£0.2	£0.1	£0.1	£0.9	£2.7
Westwood Cross	1.1%	13.0%	15.9%	32.6%	33.7%	35.3%	16.9%	1.1%	17.1%	£0.1	£1.1	£0.8	£2.5	£3.1	£2.9	£1.3	£0.1	£11.9
Canterbury	36.4%	46.8%	50.0%	31.4%	27.7%	35.3%	64.0%	51.1%	42.1%	£4.6	£4.1	£2.4	£2.4	£2.5	£2.9	£4.9	£5.5	£29.3
Folkestone	20.5%	7.8%	4.9%	1.2%	1.2%	1.2%	1.1%	27.8%	9.9%	£2.6	£0.7	£0.2	£0.1	£0.1	£0.1	£0.1	£3.0	£6.9
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	1.1%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2
Margate	1.1%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.3%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Ramsgate	0.0%	0.0%	0.0%	0.0%	1.2%	3.5%	2.2%	0.0%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.2	£0.0	£0.6
Thanet	0.0%	0.0%	0.0%	0.0%	1.2%	2.4%	0.0%	0.0%	0.4%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.3
All other shops and stores	2.3%	1.3%	0.0%	7.0%	0.0%	1.2%	5.6%	0.0%	0.0%	£0.29	£0.11	£0.0	£0.53	£0.0	£0.10	£0.43	£0.0	£1.5
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**67.0%**	**72.7%**	**73.2%**	**74.4%**	**67.5%**	**81.2%**	**92.1%**	**90.0%**	**77.0%**	**£8.5**	**£6.4**	**£3.5**	**£5.7**	**£6.2**	**£6.6**	**£7.04**	**£9.61**	**£53.6**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£12.7**	**£8.8**	**£4.8**	**£7.6**	**£9.2**	**£8.1**	**£7.6**	**£10.7**	**£69.6**

TABLE 3: COMPARISON GOODS MARKET SHARES: FURNITURE, CARPETS & OTHER FLOOR COVERINGS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£4.2**	**£3.1**	**£2.0**	**£2.9**	**£3.6**	**£3.4**	**£3.0**	**£4.1**	**£26.3**									
DOVER SUB REGIONAL CENTRE																		
In Centre	32.7%	22.4%	3.8%	3.4%	3.6%	6.1%	3.4%	1.5%	10.5%	£1.4	£0.7	£0.1	£0.1	£0.1	£0.2	£0.1	£0.1	£2.8
Edge of Centre																		
Charlton Centre, Dover	10.9%	0.0%	3.8%	3.4%	0.0%	0.0%	0.0%	1.5%	2.6%	£0.5	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.1	£0.7
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	10.9%	2.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	1.9%	1.7%	8.9%	2.0%	0.0%	0.0%	1.8%	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.5
Other Stores, Dover	3.6%	2.0%	0.0%	0.0%	1.8%	2.0%	0.0%	1.5%	1.6%	£0.2	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.4
DEAL DISTRICT CENTRE																		
In Centre	0.0%	0.0%	11.5%	27.1%	17.9%	6.1%	0.0%	0.0%	7.1%	£0.0	£0.0	£0.2	£0.8	£0.6	£0.2	£0.0	£0.0	£1.9
Out of Centre	0.0%	0.0%	5.8%	6.8%	5.4%	4.1%	0.0%	1.5%	2.7%	£0.0	£0.0	£0.1	£0.2	£0.2	£0.1	£0.0	£0.1	£0.7
SANDWICH RURAL SERVICE CENTRE	0.0%	2.0%	0.0%	0.0%	0.0%	16.3%	0.0%	0.0%	2.4%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**58.2%**	**28.6%**	**28.8%**	**42.4%**	**37.5%**	**36.7%**	**5.2%**	**5.9%**	**31.0%**	**£2.4**	**£0.9**	**£0.6**	**£1.2**	**£1.3**	**£1.3**	**£0.2**	**£0.2**	**£8.1**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	1.8%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.8%	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2
Westwood Cross	3.6%	0.0%	3.8%	27.1%	21.4%	22.4%	3.4%	0.0%	10.1%	£0.2	£0.0	£0.1	£0.8	£0.8	£0.8	£0.1	£0.0	£2.6
Canterbury	21.8%	61.2%	61.5%	27.1%	33.9%	36.7%	81.0%	57.4%	45.9%	£0.9	£1.9	£1.2	£0.8	£1.2	£1.3	£2.4	£2.3	£12.1
Folkestone	7.3%	4.1%	3.8%	1.7%	1.8%	0.0%	0.0%	32.4%	7.4%	£0.3	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£1.3	£1.9
Greenhithe	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	3.4%	0.0%	0.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Margate	1.8%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.6%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Ramsgate	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.5%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
All other shops and stores	5.5%	4.1%	0.0%	1.7%	1.8%	2.0%	5.2%	2.9%	3.1%	£0.2	£0.1	£0.0	£0.0	£0.1	£0.1	£0.2	£0.1	£0.8
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**41.8%**	**71.4%**	**71.2%**	**57.6%**	**62.5%**	**63.3%**	**94.8%**	**94.1%**	**69.0%**	**£1.8**	**£2.2**	**£1.4**	**£1.7**	**£2.2**	**£2.2**	**£2.8**	**£3.8**	**£18.1**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£4.2**	**£3.1**	**£2.0**	**£2.9**	**£3.6**	**£3.4**	**£3.0**	**£4.1**	**£26.3**

Comparison Goods 2012 Market Share Analysis

TABLE 4: COMPARISON GOODS MARKET SHARES: TEXTILES & SOFT FURNISHINGS

CENTRE / SHOPPING LOCATION	Market Share (%) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):	**£1.7**	**£1.3**	**£0.9**	**£1.1**	**£1.3**	**£1.4**	**£1.2**	**£1.7**	**£10.6**
DOVER SUB REGIONAL CENTRE									
In Centre	29.9%	14.3%	5.0%	2.9%	6.4%	5.0%	0.0%	4.2%	9.4%
Edge of Centre									
Charlton Centre, Dover	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
De Braderlei Wharf Designer Outlet, Dover	4.5%	3.2%	0.0%	1.5%	0.0%	0.0%	1.4%	1.4%	1.6%
Out of Centre									
White Cliffs Business Park, Whitfield	6.0%	4.8%	3.3%	2.9%	1.3%	0.0%	0.0%	4.2%	3.0%
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Stores, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DEAL DISTRICT CENTRE									
In Centre	0.0%	0.0%	3.3%	5.9%	10.3%	0.0%	0.0%	0.0%	2.2%
Out of Centre	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.2%
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	1.5%	0.0%	5.0%	1.4%	0.0%	1.0%
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL INSIDE DISTRICT (RETENTION)	**43.3%**	**22.2%**	**11.7%**	**14.7%**	**19.2%**	**10.0%**	**2.9%**	**9.9%**	**17.8%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	1.5%	3.2%	1.7%	1.5%	0.0%	0.0%	0.0%	2.8%	1.4%
Westwood Cross	3.0%	4.8%	15.0%	45.6%	33.3%	38.3%	8.6%	0.0%	17.2%
Canterbury	44.8%	68.3%	61.7%	32.4%	41.0%	41.7%	80.0%	52.1%	52.0%
Folkestone	7.5%	1.6%	3.3%	2.9%	1.3%	0.0%	0.0%	35.2%	7.9%
Greenhithe	0.0%	0.0%	3.3%	0.0%	0.0%	5.0%	0.0%	0.0%	0.9%
Margate	0.0%	0.0%	1.7%	1.5%	2.6%	1.7%	1.4%	0.0%	1.0%
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.4%
Thanet	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	1.4%	0.0%	0.3%
All other shops and stores	0.0%	0.0%	1.7%	1.5%	1.3%	0.0%	5.7%	0.0%	1.1%
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**56.7%**	**77.8%**	**88.3%**	**85.3%**	**80.8%**	**90.0%**	**97.1%**	**90.1%**	**82.2%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

CENTRE / SHOPPING LOCATION	Market Share (£m) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):									
DOVER SUB REGIONAL CENTRE									
In Centre	£0.5	£0.2	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£1.0
Edge of Centre									
Charlton Centre, Dover	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Out of Centre									
White Cliffs Business Park, Whitfield	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3
B&Q, Honeywood Parkway, Whitfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Stores, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE									
In Centre	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.2
Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
LOCAL CENTRES	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL INSIDE DISTRICT (RETENTION)	**£0.7**	**£0.3**	**£0.1**	**£0.2**	**£0.3**	**£0.1**	**£0.0**	**£0.2**	**£1.9**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Westwood Cross	£0.1	£0.1	£0.1	£0.5	£0.4	£0.5	£0.1	£0.0	£1.8
Canterbury	£0.8	£0.9	£0.5	£0.4	£0.5	£0.6	£1.0	£0.9	£5.5
Folkestone	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8
Greenhithe	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Margate	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Ramsgate	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thanet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**£0.97**	**£1.0**	**£0.8**	**£1.0**	**£1.1**	**£1.3**	**£1.2**	**£1.6**	**£8.8**
TOTAL	**£1.7**	**£1.3**	**£0.9**	**£1.1**	**£1.3**	**£1.4**	**£1.2**	**£1.7**	**£10.6**

TABLE 5: MARKET SHARES: HARDWARE, DIY GOODS, & DECORATING SUPPLIES

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£4.2**	**£3.2**	**£2.1**	**£2.8**	**£3.4**	**£3.3**	**£3.0**	**£3.9**	**£25.8**									
DOVER SUB REGIONAL CENTRE																		
In Centre	3.7%	0.0%	2.1%	2.4%	0.0%	2.5%	1.2%	0.0%	1.5%	£0.2	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.4
Edge of Centre																		
Charlton Centre, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	22.0%	24.4%	24.2%	21.2%	19.8%	6.2%	11.9%	16.1%	18.0%	£0.9	£0.8	£0.5	£0.6	£0.7	£0.2	£0.4	£0.6	£4.6
B&Q, Honeywood Parkway, Whitfield	70.7%	64.4%	62.1%	54.1%	43.2%	33.3%	23.8%	9.7%	44.5%	£3.0	£2.1	£1.3	£1.5	£1.4	£1.1	£0.7	£0.4	£11.5
Other Stores, Dover	0.0%	3.3%	0.0%	1.2%	0.0%	1.2%	2.4%	0.0%	1.0%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3
DEAL DISTRICT CENTRE																		
In Centre	0.0%	0.0%	3.2%	5.9%	13.6%	1.2%	0.0%	1.1%	3.0%	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	£0.0	£0.0	£0.8
Out of Centre	0.0%	0.0%	5.3%	3.5%	12.3%	2.5%	0.0%	1.1%	2.9%	£0.0	£0.0	£0.1	£0.1	£0.4	£0.1	£0.0	£0.0	£0.7
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%	0.0%	0.0%	1.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.3
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	1.1%	0.0%	0.0%	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
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**96.3%**	**93.3%**	**96.8%**	**88.2%**	**88.9%**	**56.8%**	**39.3%**	**28.0%**	**72.2%**	**£4.0**	**£3.0**	**£2.0**	**£2.5**	**£3.0**	**£1.9**	**£1.2**	**£1.1**	**£18.6**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.1%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Westwood Cross	0.0%	0.0%	1.1%	4.7%	7.4%	14.8%	3.6%	0.0%	3.9%	£0.0	£0.0	£0.0	£0.1	£0.2	£0.5	£0.1	£0.0	£1.0
Canterbury	0.0%	3.3%	1.1%	3.5%	3.7%	9.9%	54.8%	15.1%	11.3%	£0.0	£0.1	£0.0	£0.1	£0.1	£0.3	£1.7	£0.6	£2.9
Folkestone	3.7%	3.3%	1.1%	1.2%	0.0%	0.0%	0.0%	55.9%	9.6%	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£2.5
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	1.2%	0.0%	12.3%	0.0%	0.0%	1.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.4
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	1.2%	0.0%	0.9%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
All other shops and stores	0.0%	0.0%	0.0%	1.2%	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
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**3.7%**	**6.7%**	**3.2%**	**11.8%**	**11.1%**	**43.2%**	**60.7%**	**72.0%**	**27.8%**	**£0.2**	**£0.2**	**£0.1**	**£0.3**	**£0.4**	**£1.4**	**£1.8**	**£2.8**	**£7.2**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£4.2**	**£3.2**	**£2.1**	**£2.8**	**£3.4**	**£3.3**	**£3.0**	**£3.9**	**£25.8**

Comparison Goods 2012 Market Share Analysis

TABLE 6: MARKET SHARES: GARDENS, PLANTS AND FLOWERS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£0.9**	**£0.9**	**£0.6**	**£0.8**	**£0.9**	**£1.0**	**£0.8**	**£1.2**	**£7.1**									
DOVER SUB REGIONAL CENTRE																		
In Centre	9.3%	1.3%	2.6%	0.0%	1.4%	2.6%	2.8%	0.0%	2.4%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Edge of Centre																		
Charlton Centre, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	20.0%	25.6%	20.5%	24.0%	11.1%	5.3%	9.9%	12.0%	15.4%	£0.2	£0.2	£0.1	£0.2	£0.1	£0.1	£0.1	£0.1	£1.1
B&Q, Honeywood Parkway, Whitfield	54.7%	57.7%	41.0%	32.9%	34.7%	17.1%	21.1%	6.0%	31.5%	£0.5	£0.5	£0.3	£0.3	£0.3	£0.2	£0.2	£0.1	£2.2
Other Stores, Dover	2.7%	5.1%	0.0%	2.5%	0.0%	0.0%	0.0%	2.4%	1.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
DEAL DISTRICT CENTRE																		
In Centre	1.3%	0.0%	2.6%	15.2%	23.6%	2.6%	0.0%	0.0%	5.3%	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.4
Out of Centre	0.0%	0.0%	10.3%	10.1%	13.9%	1.3%	0.0%	0.0%	3.9%	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.3
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	5.1%	6.3%	5.6%	34.2%	2.8%	1.2%	7.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.5
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	1.3%	0.0%	1.4%	0.0%	7.0%	2.4%	1.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
VILLAGES AND HAMLETS	0.0%	2.6%	0.0%	2.5%	0.0%	1.3%	0.0%	0.0%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
TOTAL INSIDE DISTRICT (RETENTION)	**88.0%**	**92.3%**	**83.3%**	**93.7%**	**91.7%**	**64.5%**	**45.1%**	**24.1%**	**69.9%**	**£0.8**	**£0.8**	**£0.5**	**£0.7**	**£0.8**	**£0.6**	**£0.4**	**£0.3**	**£4.9**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	2.7%	2.6%	1.3%	1.3%	0.0%	0.0%	2.8%	7.2%	2.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2
Westwood Cross	0.0%	0.0%	0.0%	1.3%	5.6%	10.5%	2.8%	0.0%	2.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Canterbury	1.3%	1.3%	7.7%	0.0%	1.4%	9.2%	42.3%	14.5%	10.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.2	£0.7
Folkestone	8.0%	3.8%	5.1%	1.3%	0.0%	0.0%	0.0%	51.8%	10.9%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Ramsgate	0.0%	0.0%	0.0%	1.3%	0.0%	7.9%	0.0%	0.0%	1.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.4%	0.0%	0.4%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	0.0%	0.0%	2.6%	1.3%	1.4%	1.3%	5.6%	2.4%	1.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**12.0%**	**7.7%**	**16.7%**	**6.3%**	**8.3%**	**35.5%**	**54.9%**	**75.9%**	**30.1%**	**£0.1**	**£0.1**	**£0.1**	**£0.0**	**£0.1**	**£0.4**	**£0.5**	**£0.9**	**£2.1**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£0.9**	**£0.9**	**£0.6**	**£0.8**	**£0.9**	**£1.0**	**£0.8**	**£1.2**	**£7.1**

Comparison Goods 2012 Market Share Analysis

TABLE 7: MARKET SHARES: LARGE DOMESTIC APPLIANCES

CENTRE / SHOPPING LOCATION	Market Share (%) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):	**£1.6**	**£1.4**	**£0.7**	**£1.2**	**£1.4**	**£1.1**	**£1.0**	**£1.4**	**£9.9**
DOVER SUB REGIONAL CENTRE									
In Centre	32.7%	27.0%	15.9%	3.6%	5.1%	3.0%	3.2%	6.2%	13.1%
Edge of Centre									
Charlton Centre, Dover	1.9%	1.6%	7.9%	0.0%	0.0%	0.0%	1.6%	3.1%	1.7%
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre									
White Cliffs Business Park, Whitfield	1.9%	7.9%	6.3%	5.4%	1.7%	0.0%	1.6%	0.0%	2.9%
B&Q, Honeywood Parkway, Whitfield	1.9%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Other Stores, Dover	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
DEAL DISTRICT CENTRE									
In Centre	0.0%	0.0%	17.5%	23.2%	35.6%	7.6%	0.0%	1.5%	10.2%
Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.3%
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES	0.0%	3.2%	4.8%	1.8%	0.0%	4.5%	6.3%	1.5%	2.4%
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL INSIDE DISTRICT (RETENTION)	**38.5%**	**42.9%**	**54.0%**	**33.9%**	**42.4%**	**18.2%**	**12.7%**	**12.3%**	**31.5%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	0.0%	1.6%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.4%
Westwood Cross	1.9%	4.8%	1.6%	41.1%	30.5%	51.5%	7.9%	0.0%	17.1%
Canterbury	13.5%	14.3%	22.2%	14.3%	20.3%	15.2%	66.7%	29.2%	23.2%
Folkestone	46.2%	34.9%	17.5%	5.4%	1.7%	0.0%	4.8%	58.5%	23.5%
Greenhithe	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Margate	0.0%	1.6%	1.6%	0.0%	3.4%	6.1%	4.8%	0.0%	2.0%
Ramsgate	0.0%	0.0%	0.0%	3.6%	1.7%	6.1%	3.2%	0.0%	1.7%
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.2%
All other shops and stores	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.2%
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**61.5%**	**57.1%**	**46.0%**	**66.1%**	**57.6%**	**81.8%**	**87.3%**	**87.7%**	**68.5%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

CENTRE / SHOPPING LOCATION	Market Share (£m) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):									
DOVER SUB REGIONAL CENTRE									
In Centre	£0.5	£0.4	£0.1	£0.0	£0.1	£0.0	£0.0	£0.1	£1.3
Edge of Centre									
Charlton Centre, Dover	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
De Braderlei Wharf Designer Outlet, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of Centre									
White Cliffs Business Park, Whitfield	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
B&Q, Honeywood Parkway, Whitfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Other Stores, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE									
In Centre	£0.0	£0.0	£0.1	£0.3	£0.5	£0.1	£0.0	£0.0	£1.0
Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
LOCAL CENTRES	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.2
VILLAGES AND HAMLETS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL INSIDE DISTRICT (RETENTION)	**£0.6**	**£0.6**	**£0.4**	**£0.4**	**£0.6**	**£0.2**	**£0.1**	**£0.2**	**£3.1**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Westwood Cross	£0.0	£0.1	£0.0	£0.5	£0.4	£0.6	£0.1	£0.0	£1.7
Canterbury	£0.2	£0.2	£0.1	£0.2	£0.3	£0.2	£0.7	£0.4	£2.3
Folkestone	£0.8	£0.5	£0.1	£0.1	£0.0	£0.0	£0.0	£0.8	£2.3
Greenhithe	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Ramsgate	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Thanet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**£1.0**	**£0.8**	**£0.3**	**£0.8**	**£0.8**	**£0.9**	**£0.9**	**£1.2**	**£6.8**
TOTAL	**£1.6**	**£1.4**	**£0.7**	**£1.2**	**£1.4**	**£1.1**	**£1.0**	**£1.4**	**£9.9**

Comparison Goods 2012 Market Share Analysis

TABLE 8: MARKET SHARES: SMALL DOMESTIC APPLIANCES

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£0.2**	**£0.2**	**£0.1**	**£0.1**	**£0.2**	**£0.2**	**£0.1**	**£0.2**	**£1.4**									
DOVER SUB REGIONAL CENTRE																		
In Centre	58.2%	42.9%	18.8%	9.6%	11.8%	5.1%	7.8%	3.8%	19.9%	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Edge of Centre																		
Charlton Centre, Dover	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	20.3%	36.4%	26.3%	21.9%	7.9%	10.3%	10.4%	11.2%	17.4%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 Stores, Dover	0.0%	1.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE																		
In Centre	0.0%	0.0%	12.5%	28.8%	35.5%	6.4%	0.0%	1.3%	10.1%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Out of Centre	0.0%	0.0%	3.8%	5.5%	6.6%	1.3%	0.0%	0.0%	2.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	2.7%	1.3%	11.5%	0.0%	0.0%	2.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.1%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL INSIDE DISTRICT (RETENTION)	**78.5%**	**80.5%**	**66.3%**	**68.5%**	**63.2%**	**34.6%**	**19.5%**	**16.2%**	**52.2%**	**£0.1**	**£0.1**	**£0.1**	**£0.1**	**£0.1**	**£0.1**	**£0.0**	**£0.0**	**£0.7**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	0.0%	1.3%	0.0%	1.4%	0.0%	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
Westwood Cross	1.3%	3.9%	1.2%	23.3%	21.1%	42.3%	10.4%	0.0%	13.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Canterbury	3.8%	6.5%	17.5%	5.5%	13.2%	14.1%	63.6%	25.0%	18.1%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2
Folkestone	15.2%	7.8%	12.5%	0.0%	1.3%	0.0%	2.6%	57.5%	13.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2
Greenhithe	0.0%	0.0%	1.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.3%	0.0%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	1.3%	0.0%	0.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thanet	0.0%	0.0%	0.0%	0.0%	1.3%	2.6%	0.0%	0.0%	0.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	1.3%	0.0%	1.2%	1.4%	0.0%	0.0%	1.3%	1.3%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**21.5%**	**19.5%**	**33.7%**	**31.5%**	**36.8%**	**65.4%**	**80.5%**	**83.8%**	**47.8%**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.1**	**£0.1**	**£0.1**	**£0.2**	**£0.6**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£0.2**	**£0.2**	**£0.1**	**£0.1**	**£0.2**	**£0.2**	**£0.1**	**£0.2**	**£1.4**

Comparison Goods 2012 Market Share Analysis

TABLE 9: MARKET SHARES: AUDIO-VISUAL, PHOTOGRAPHIC AND COMPUTER ITEMS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£5.4**	**£3.3**	**£1.9**	**£3.6**	**£4.1**	**£3.6**	**£3.2**	**£4.3**	**£29.4**									
DOVER SUB REGIONAL CENTRE																		
In Centre	36.2%	14.5%	13.4%	4.8%	8.5%	3.1%	4.9%	4.8%	12.6%	£2.0	£0.5	£0.3	£0.2	£0.3	£0.1	£0.2	£0.2	£3.7
Edge of Centre																		
Charlton Centre, Dover	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	15.5%	14.5%	11.9%	8.1%	5.1%	4.7%	3.3%	3.2%	8.4%	£0.8	£0.5	£0.2	£0.3	£0.2	£0.2	£0.1	£0.1	£2.5
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 Stores, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE																		
In Centre	0.0%	0.0%	6.0%	11.3%	18.6%	1.6%	0.0%	0.0%	4.5%	£0.0	£0.0	£0.1	£0.4	£0.8	£0.1	£0.0	£0.0	£1.3
Out of Centre	0.0%	0.0%	1.5%	3.2%	5.1%	0.0%	0.0%	0.0%	1.2%	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.4
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**51.7%**	**29.1%**	**35.8%**	**27.4%**	**37.3%**	**14.1%**	**8.2%**	**8.1%**	**27.4%**	**£2.8**	**£1.0**	**£0.7**	**£1.0**	**£1.5**	**£0.5**	**£0.3**	**£0.3**	**£8.1**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	1.7%	0.0%	0.0%	1.6%	0.0%	1.6%	0.0%	4.8%	1.4%	£0.1	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.2	£0.4
Westwood Cross	1.7%	3.6%	4.5%	37.1%	28.8%	54.7%	9.8%	0.0%	17.3%	£0.1	£0.1	£0.1	£1.3	£1.2	£2.0	£0.3	£0.0	£5.1
Canterbury	12.1%	21.8%	35.8%	24.2%	23.7%	20.3%	75.4%	29.0%	28.2%	£0.7	£0.7	£0.7	£0.9	£1.0	£0.7	£2.4	£1.3	£8.3
Folkestone	29.3%	43.6%	17.9%	1.6%	1.7%	0.0%	3.3%	58.1%	20.8%	£1.6	£1.4	£0.3	£0.1	£0.1	£0.0	£0.1	£2.5	£6.1
Greenhithe	0.0%	0.0%	1.5%	1.6%	1.7%	1.6%	0.0%	0.0%	0.7%	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.2
Margate	0.0%	0.0%	1.5%	3.2%	3.4%	0.0%	1.6%	0.0%	1.1%	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1	£0.0	£0.3
Ramsgate	0.0%	0.0%	0.0%	1.6%	1.7%	3.1%	1.6%	0.0%	1.0%	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.1	£0.0	£0.3
Thanet	0.0%	0.0%	0.0%	0.0%	1.7%	1.6%	0.0%	0.0%	0.4%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.1
All other shops and stores	3.4%	1.8%	3.0%	1.6%	0.0%	3.1%	0.0%	0.0%	1.6%	£0.2	£0.1	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.5
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**48.3%**	**70.9%**	**64.2%**	**72.6%**	**62.7%**	**85.9%**	**91.8%**	**91.9%**	**72.6%**	**£2.6**	**£2.3**	**£1.2**	**£2.6**	**£2.5**	**£3.1**	**£3.0**	**£4.0**	**£21.4**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£5.4**	**£3.3**	**£1.9**	**£3.6**	**£4.1**	**£3.6**	**£3.2**	**£4.3**	**£29.4**

Comparison Goods 2012 Market Share Analysis

TABLE 10: MARKET SHARES: CDS AND DVDS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£1.9**	**£1.2**	**£0.7**	**£1.2**	**£1.5**	**£1.3**	**£1.2**	**£1.5**	**£10.5**									
DOVER SUB REGIONAL CENTRE																		
In Centre	23.5%	23.5%	12.5%	2.4%	0.0%	2.6%	5.1%	0.0%	9.1%	£0.5	£0.3	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.9
Edge of Centre																		
Charlton Centre, Dover	2.9%	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	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	35.3%	52.9%	28.1%	23.8%	12.1%	15.4%	7.7%	14.7%	23.8%	£0.7	£0.6	£0.2	£0.3	£0.2	£0.2	£0.1	£0.2	£2.5
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 Stores, Dover	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
DEAL DISTRICT CENTRE																		
In Centre	2.9%	2.9%	12.5%	16.7%	36.4%	7.7%	0.0%	0.0%	9.7%	£0.1	£0.0	£0.1	£0.2	£0.5	£0.1	£0.0	£0.0	£1.0
Out of Centre	0.0%	0.0%	0.0%	4.8%	3.0%	0.0%	0.0%	0.0%	1.0%	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
SANDWICH RURAL SERVICE CENTRE	0.0%	2.9%	0.0%	2.4%	0.0%	2.6%	0.0%	0.0%	0.9%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
AYLESHAM (PROPOSED) RURAL SERVICE 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	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**64.7%**	**82.4%**	**56.3%**	**50.0%**	**51.5%**	**28.2%**	**12.8%**	**14.7%**	**45.2%**	**£1.3**	**£1.0**	**£0.4**	**£0.6**	**£0.8**	**£0.4**	**£0.2**	**£0.2**	**£4.7**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	2.9%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.8%	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Westwood Cross	0.0%	2.9%	6.2%	23.8%	24.2%	43.6%	12.8%	0.0%	13.6%	£0.0	£0.0	£0.0	£0.3	£0.4	£0.5	£0.2	£0.0	£1.4
Canterbury	20.6%	8.8%	25.0%	16.7%	21.2%	20.5%	74.4%	35.3%	27.3%	£0.4	£0.1	£0.2	£0.2	£0.3	£0.3	£0.9	£0.5	£2.9
Folkestone	11.8%	5.9%	9.4%	2.4%	0.0%	0.0%	0.0%	50.0%	10.9%	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.8	£1.1
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	2.4%	3.0%	0.0%	0.0%	0.0%	0.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	0.9%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 and stores	0.0%	0.0%	3.1%	2.4%	0.0%	0.0%	0.0%	0.0%	0.5%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**35.3%**	**17.6%**	**43.7%**	**50.0%**	**48.5%**	**71.8%**	**87.2%**	**85.3%**	**54.8%**	**£0.7**	**£0.2**	**£0.3**	**£0.6**	**£0.7**	**£0.9**	**£1.0**	**£1.3**	**£5.7**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£1.9**	**£1.2**	**£0.7**	**£1.2**	**£1.5**	**£1.3**	**£1.2**	**£1.5**	**£10.5**

Comparison Goods 2012 Market Share Analysis

TABLE 11: MARKET SHARES: PERSONAL USE & CARE, INCLUDING MEDICAL GOODS, PHARMACEUTICAL PRODUCTS

CENTRE / SHOPPING LOCATION	Market Share (%) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL	Market Share (£m) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):	**£8.1**	**£6.3**	**£3.7**	**£5.5**	**£6.5**	**£6.3**	**£5.7**	**£7.8**	**£50.0**									
DOVER SUB REGIONAL CENTRE																		
In Centre	68.5%	54.3%	28.2%	5.6%	1.1%	3.3%	3.3%	11.1%	23.4%	£5.6	£3.4	£1.0	£0.3	£0.1	£0.2	£0.2	£0.9	£11.7
Edge of Centre																		
Charlton Centre, Dover	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	22.8%	38.0%	20.0%	13.3%	1.1%	6.7%	15.2%	12.2%	16.1%	£1.9	£2.4	£0.7	£0.7	£0.1	£0.4	£0.9	£1.0	£8.0
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 stores, Dover	0.0%	1.1%	1.2%	0.0%	0.0%	0.0%	1.1%	2.2%	0.7%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.3
DEAL DISTRICT CENTRE																		
In Centre	2.2%	1.1%	32.9%	68.9%	88.0%	12.2%	1.1%	1.1%	23.9%	£0.2	£0.1	£1.2	£3.8	£5.8	£0.8	£0.1	£0.1	£11.9
Out of Centre	0.0%	0.0%	1.2%	5.6%	5.4%	0.0%	0.0%	0.0%	1.4%	£0.0	£0.0	£0.0	£0.3	£0.4	£0.0	£0.0	£0.0	£0.7
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	27.8%	2.2%	0.0%	3.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.1	£0.0	£1.9
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.2%	0.0%	1.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.9
LOCAL CENTRES	0.0%	0.0%	1.2%	0.0%	0.0%	15.6%	6.5%	1.1%	3.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.4	£0.1	£1.5
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**93.5%**	**95.7%**	**84.7%**	**93.3%**	**95.7%**	**65.6%**	**44.6%**	**27.8%**	**74.0%**	**£7.6**	**£6.0**	**£3.1**	**£5.1**	**£6.2**	**£4.1**	**£2.5**	**£2.2**	**£37.0**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	1.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Westwood Cross	0.0%	1.1%	2.4%	1.1%	2.2%	17.8%	4.3%	0.0%	3.4%	£0.0	£0.1	£0.1	£0.1	£0.1	£1.1	£0.2	£0.0	£1.7
Canterbury	1.1%	1.1%	11.8%	2.2%	2.2%	11.1%	48.9%	16.7%	11.3%	£0.1	£0.1	£0.4	£0.1	£0.1	£0.7	£2.8	£1.3	£5.6
Folkestone	4.3%	0.0%	1.2%	1.1%	0.0%	0.0%	0.0%	52.2%	9.1%	£0.4	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.1	£4.5
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	1.1%	0.0%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.1
Thanet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 and stores	0.0%	1.1%	0.0%	2.2%	0.0%	4.4%	1.1%	3.3%	1.6%	£0.0	£0.1	£0.0	£0.1	£0.0	£0.3	£0.1	£0.3	£0.8
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**6.5%**	**4.3%**	**15.3%**	**6.7%**	**4.3%**	**34.4%**	**55.4%**	**72.2%**	**26.0%**	**£0.5**	**£0.3**	**£0.6**	**£0.4**	**£0.3**	**£2.2**	**£3.2**	**£5.6**	**£13.0**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£8.1**	**£6.3**	**£3.7**	**£5.5**	**£6.5**	**£6.3**	**£5.7**	**£7.8**	**£50.0**

DOVER DISTRICT COUNCIL
2012 RETAIL STUDY UPDATE

Comparison Goods 2012 Market Share Analysis

TABLE 12: MARKET SHARES: GAMES, TOYS, HOBBIES, SPORTS, CAMPING & MUSICAL INSTRUMENTS

CENTRE / SHOPPING LOCATION	Market Share (%) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):	**£6.7**	**£5.0**	**£2.5**	**£4.4**	**£5.3**	**£4.4**	**£4.4**	**£5.6**	**£38.2**
DOVER SUB REGIONAL CENTRE									
In Centre	64.1%	41.0%	18.7%	18.2%	17.6%	0.0%	8.3%	11.9%	25.0%
Edge of Centre									
Charlton Centre, Dover	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre									
White Cliffs Business Park, Whitfield	7.7%	10.3%	9.4%	12.1%	2.9%	5.7%	5.6%	9.5%	7.8%
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Stores, Dover	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.3%
DEAL DISTRICT CENTRE									
In Centre	0.0%	0.0%	12.5%	0.0%	17.6%	14.3%	0.0%	0.0%	4.9%
Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.3%
SANDWICH RURAL SERVICE CENTRE	0.0%	2.6%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	1.0%
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES AND HAMLETS	0.0%	0.0%	6.2%	3.0%	0.0%	0.0%	0.0%	0.0%	0.8%
TOTAL INSIDE DISTRICT (RETENTION)	**71.8%**	**56.4%**	**46.9%**	**36.4%**	**38.2%**	**25.7%**	**13.9%**	**23.8%**	**40.5%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	2.6%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%	2.5%
Westwood Cross	15.4%	12.8%	12.5%	33.3%	44.1%	42.9%	30.6%	0.0%	23.6%
Canterbury	5.1%	15.4%	31.3%	15.2%	11.8%	25.7%	50.0%	23.8%	20.5%
Folkestone	2.6%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	38.1%	6.4%
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Margate	2.6%	2.6%	9.4%	6.1%	0.0%	0.0%	0.0%	0.0%	2.1%
Ramsgate	0.0%	0.0%	0.0%	6.1%	0.0%	2.9%	0.0%	0.0%	1.0%
Thanet	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.4%
All other shops and stores	0.0%	5.1%	0.0%	3.0%	2.9%	2.9%	5.6%	4.8%	3.1%
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**28.2%**	**43.6%**	**53.1%**	**63.6%**	**61.8%**	**74.3%**	**86.1%**	**76.2%**	**59.5%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

CENTRE / SHOPPING LOCATION	Market Share (£m) Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):									
DOVER SUB REGIONAL CENTRE									
In Centre	£4.3	£2.0	£0.5	£0.8	£0.9	£0.0	£0.4	£0.7	£9.6
Edge of Centre									
Charlton Centre, Dover	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of Centre									
White Cliffs Business Park, Whitfield	£0.5	£0.5	£0.2	£0.5	£0.2	£0.3	£0.2	£0.5	£3.0
B&Q, Honeywood Parkway, Whitfield	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Stores, Dover	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
DEAL DISTRICT CENTRE									
In Centre	£0.0	£0.0	£0.3	£0.0	£0.9	£0.6	£0.0	£0.0	£1.9
Out of Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.4
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
LOCAL CENTRES	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
VILLAGES AND HAMLETS	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
TOTAL INSIDE DISTRICT (RETENTION)	**£4.8**	**£2.8**	**£1.2**	**£1.6**	**£2.0**	**£1.1**	**£0.6**	**£1.3**	**£15.5**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Ashford	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.0
Westwood Cross	£1.0	£0.6	£0.3	£1.5	£2.3	£1.9	£1.3	£0.0	£9.0
Canterbury	£0.3	£0.8	£0.8	£0.7	£0.6	£1.1	£2.2	£1.3	£7.8
Folkestone	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£2.4
Greenhithe	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	£0.2	£0.1	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8
Ramsgate	£0.0	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.4
Thanet	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2
All other shops and stores	£0.0	£0.3	£0.0	£0.1	£0.2	£0.1	£0.2	£0.3	£1.2
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**£1.9**	**£2.2**	**£1.3**	**£2.8**	**£3.3**	**£3.3**	**£3.8**	**£4.3**	**£22.7**
TOTAL	**£6.7**	**£5.0**	**£2.5**	**£4.4**	**£5.3**	**£4.4**	**£4.4**	**£5.6**	**£38.2**

Comparison Goods 2012 Market Share Analysis

TABLE 13: MARKET SHARES: PETS AND PET RELATED PRODUCTS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£1.1**	**£0.8**	**£0.7**	**£0.8**	**£0.9**	**£1.1**	**£1.0**	**£1.2**	**£7.5**									
DOVER SUB REGIONAL CENTRE																		
In Centre	48.1%	37.3%	27.5%	13.0%	2.5%	2.2%	0.0%	6.3%	16.5%	£0.5	£0.3	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£1.2
Edge of Centre																		
Charlton Centre, Dover	3.7%	0.0%	5.0%	0.0%	2.5%	0.0%	2.1%	0.0%	1.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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																		
White Cliffs Business Park, Whitfield	11.1%	41.2%	20.0%	19.6%	5.0%	8.9%	12.5%	6.3%	14.5%	£0.1	£0.3	£0.1	£0.2	£0.0	£0.1	£0.1	£0.1	£1.1
B&Q, Honeywood Parkway, Whitfield	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Stores, Dover	3.7%	7.8%	5.0%	2.2%	0.0%	0.0%	2.1%	2.1%	2.7%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
DEAL DISTRICT CENTRE																		
In Centre	0.0%	2.0%	30.0%	32.6%	62.5%	4.4%	2.1%	0.0%	14.9%	£0.0	£0.0	£0.2	£0.3	£0.6	£0.0	£0.0	£0.0	£1.1
Out of Centre	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%	2.1%	0.0%	1.8%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	2.2%	0.0%	22.2%	4.2%	0.0%	3.9%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.3
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
LOCAL CENTRES	0.0%	0.0%	5.0%	2.2%	0.0%	6.7%	6.3%	2.1%	2.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.2
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**66.7%**	**90.2%**	**92.5%**	**71.7%**	**85.0%**	**44.4%**	**33.3%**	**16.7%**	**59.1%**	**£0.7**	**£0.8**	**£0.6**	**£0.6**	**£0.8**	**£0.5**	**£0.3**	**£0.2**	**£4.4**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	1.9%	0.0%	0.0%	0.0%	0.0%	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
Westwood Cross	0.0%	2.0%	0.0%	13.0%	12.5%	35.6%	8.3%	0.0%	9.2%	£0.0	£0.0	£0.0	£0.1	£0.1	£0.4	£0.1	£0.0	£0.7
Canterbury	0.0%	2.0%	5.0%	0.0%	0.0%	15.6%	54.2%	31.2%	14.7%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.5	£0.4	£1.1
Folkestone	29.6%	5.9%	2.5%	8.7%	0.0%	0.0%	4.2%	50.0%	14.4%	£0.3	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.6	£1.1
Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Margate	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ramsgate	0.0%	0.0%	0.0%	4.3%	0.0%	2.2%	0.0%	0.0%	0.8%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Thanet	0.0%	0.0%	0.0%	0.0%	2.5%	2.2%	0.0%	0.0%	0.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**33.3%**	**9.8%**	**7.5%**	**28.3%**	**15.0%**	**55.6%**	**66.7%**	**83.3%**	**40.9%**	**£0.4**	**£0.1**	**£0.1**	**£0.2**	**£0.1**	**£0.6**	**£0.6**	**£1.0**	**£3.1**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£1.1**	**£0.8**	**£0.7**	**£0.8**	**£0.9**	**£1.1**	**£1.0**	**£1.2**	**£7.5**

Comparison Goods 2012 Market Share Analysis

TABLE 14: ALL OTHER NON-FOOD GOODS

	Market Share (%)									Market Share (£m)								
CENTRE / SHOPPING LOCATION	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**TOTAL**
TOTAL AVAILABLE EXPENDITURE (£m):	**£5.2**	**£3.9**	**£2.5**	**£3.5**	**£4.5**	**£4.2**	**£3.7**	**£5.1**	**£32.4**									
DOVER SUB REGIONAL CENTRE																		
In Centre	78.7%	54.1%	38.3%	8.3%	7.4%	6.2%	7.1%	10.3%	27.1%	£4.1	£2.1	£0.9	£0.3	£0.3	£0.3	£0.3	£0.5	£8.8
Edge of Centre																		
Charlton Centre, Dover	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
De Braderlei Wharf Designer Outlet, Dover	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Out of Centre																		
White Cliffs Business Park, Whitfield	4.9%	14.8%	3.3%	3.3%	1.5%	1.6%	12.5%	3.4%	5.5%	£0.3	£0.6	£0.1	£0.1	£0.1	£0.1	£0.5	£0.2	£1.8
B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 Stores, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
DEAL DISTRICT CENTRE																		
In Centre	1.6%	1.6%	28.3%	55.0%	69.1%	20.3%	3.6%	0.0%	21.1%	£0.1	£0.1	£0.7	£1.9	£3.1	£0.8	£0.1	£0.0	£6.8
Out of 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	£0.0	£0.0
SANDWICH RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	1.7%	0.0%	14.1%	0.0%	0.0%	2.0%	£0.0	£0.0	£0.0	£0.1	£0.0	£0.6	£0.0	£0.0	£0.6
AYLESHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.2%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
LOCAL CENTRES	0.0%	1.6%	0.0%	0.0%	0.0%	3.1%	1.8%	0.0%	0.8%	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.3
VILLAGES AND HAMLETS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 INSIDE DISTRICT (RETENTION)	**85.2%**	**73.8%**	**70.0%**	**68.3%**	**79.4%**	**45.3%**	**28.6%**	**13.8%**	**57.3%**	**£4.4**	**£2.8**	**£1.7**	**£2.4**	**£3.6**	**£1.9**	**£1.1**	**£0.7**	**£18.6**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Ashford	4.9%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	1.5%	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.5
Westwood Cross	0.0%	1.6%	5.0%	13.3%	7.4%	21.9%	5.4%	0.0%	6.5%	£0.0	£0.1	£0.1	£0.5	£0.3	£0.9	£0.2	£0.0	£2.1
Canterbury	6.6%	16.4%	21.7%	18.3%	7.4%	25.0%	64.3%	39.7%	24.4%	£0.3	£0.6	£0.5	£0.6	£0.3	£1.0	£2.4	£2.0	£7.9
Folkestone	3.3%	3.3%	0.0%	0.0%	1.5%	0.0%	0.0%	41.4%	7.6%	£0.2	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£2.1	£2.5
Greenhithe	0.0%	0.0%	1.7%	0.0%	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
Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.6%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Thanet	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.4%	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
All other shops and stores	0.0%	3.3%	1.7%	0.0%	1.5%	3.1%	1.8%	1.7%	1.6%	£0.0	£0.1	£0.0	£0.0	£0.1	£0.1	£0.1	£0.1	£0.5
TOTAL OUTSIDE DISTRICT (LEAKAGE)	**14.8%**	**26.2%**	**30.0%**	**31.7%**	**20.6%**	**54.7%**	**71.4%**	**86.2%**	**42.7%**	**£0.8**	**£1.0**	**£0.7**	**£1.1**	**£0.9**	**£2.3**	**£2.7**	**£4.4**	**£13.8**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**£5.2**	**£3.9**	**£2.5**	**£3.5**	**£4.5**	**£4.2**	**£3.7**	**£5.1**	**£32.4**

Convenience Goods Capacity Assessment

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2012 - 2031)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	24,612	25,876	27,077	27,427	27,658	28,581	16.1%
Zone 2:	16,284	17,121	17,915	18,147	18,300	18,911	16.1%
Zone 3:	8,128	8,546	8,943	9,058	9,135	9,440	16.1%
Zone 4:	13,795	14,504	15,177	15,373	15,503	16,020	16.1%
Zone 5:	16,119	16,947	17,733	17,963	18,114	18,718	16.1%
Zone 6:	13,995	14,714	15,397	15,596	15,728	16,253	16.1%
Zone 7:	13,277	13,959	14,607	14,796	14,920	15,419	16.1%
Zone 8:	15,534	16,332	17,090	17,311	17,456	18,039	16.1%
TOTAL:	**121,744**	**128,000**	**133,938**	**135,672**	**136,814**	**141,380**	**16.1%**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Notes: Base year population derived from Experian Revised Population Estimates 2010. Projects from 2012 - 2031 informed by data provided Kent County Council.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2010 prices)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	£1,685	£1,703	£1,747	£1,780	£1,788	£1,830	8.6%
Zone 2:	£1,784	£1,802	£1,849	£1,884	£1,893	£1,937	8.6%
Zone 3:	£2,005	£2,025	£2,078	£2,117	£2,127	£2,176	8.6%
Zone 4:	£1,854	£1,873	£1,922	£1,958	£1,967	£2,013	8.6%
Zone 5:	£1,927	£1,947	£1,997	£2,035	£2,045	£2,092	8.6%
Zone 6:	£2,024	£2,044	£2,097	£2,137	£2,147	£2,197	8.6%
Zone 7:	£1,935	£1,955	£2,006	£2,044	£2,054	£2,101	8.6%
Zone 8:	£2,047	£2,068	£2,122	£2,162	£2,172	£2,223	8.6%

Source: Average spend per capita estimates for each zone are derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts for convenience goods based on Experian *Retail Planner Briefing Note 9 (September 2011).* Expenditure on SFT has been deducted at the outset, and is also based on Experian Business Strategies *Retail Planner Briefing Note 9 (September 2011)*.

TABLE 3: TOTAL FORECAST GROWTH IN CONVENIENCE GOODS EXPENDITURE, 2012 - 2031 (£ million)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	£41.5	£44.1	£47.3	£48.8	£49.5	£52.3	26.1%
Zone 2:	£29.0	£30.9	£33.1	£34.2	£34.6	£36.6	26.1%
Zone 3:	£16.3	£17.3	£18.6	£19.2	£19.4	£20.5	26.1%
Zone 4:	£25.6	£27.2	£29.2	£30.1	£30.5	£32.2	26.1%
Zone 5:	£31.1	£33.0	£35.4	£36.5	£37.0	£39.2	26.1%
Zone 6:	£28.3	£30.1	£32.3	£33.3	£33.8	£35.7	26.1%
Zone 7:	£25.7	£27.3	£29.3	£30.2	£30.6	£32.4	26.1%
Zone 8:	£31.8	£33.8	£36.3	£37.4	£37.9	£40.1	26.1%
TOTAL:	**£229.3**	**£243.5**	**£261.4**	**£269.8**	**£273.4**	**£289.1**	**26.1%**

Source: Expenditure calculated from Tables 1 & 2.

strategicperspecti>es

Convenience Goods Capacity Assessment

TABLE 4: EXISTING CONVENIENCE GOODS FLOORSPACE & ESTIMATED 'BENCHMARK' TURNOVER LEVELS

	Estimated Conv Sales Area (m^2 net)		Average Sales Density (£ per m^2)	2012	2017	2022	2026	2027	2031
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	491	(2)	£11,500	£5.6	£5.7	£5.8	£5.9	£5.9	£5.9
Co-Op, Castle Street	1,092	(2)	£7,500	£8.2	£8.3	£8.4	£8.5	£8.5	£8.6
Other Convenience Stores	555	(1)	£4,000	£2.2	£2.2	£2.3	£2.3	£2.3	£2.3
In Centre Subtotal	2,138		£7,510	£16.1	£16.2	£16.4	£16.6	£16.7	£16.9
Iceland, High Street	424	(2)	£5,500	£2.3	£2.3	£2.4	£2.4	£2.4	£2.5
Edge of Centre Subtotal	424		£5,500	£2.3	£2.3	£2.4	£2.4	£2.4	£2.5
Morrisons, Bridge Street, Dover	3,620	(2)	£12,000	£43.4	£43.8	£44.4	£45.0	£45.2	£45.7
Aldi, Cherry Tree Avenue	585	(2)	£4,500	£2.6	£2.7	£2.7	£2.7	£2.7	£2.8
Asda, Charlton Green, Dover	790	(2)	£15,500	£12.2	£12.3	£12.5	£12.7	£12.7	£12.9
Tesco Extra, Whitecliffs	3,062	(2)	£13,500	£41.3	£41.7	£42.2	£42.8	£43.0	£43.5
Farm Foods, Charlton Green, Dover	333	(3)	£5,000	£1.7	£1.7	£1.7	£1.7	£1.7	£1.7
All other	362	(3)	£5,857	£2.1	£2.1	£2.2	£2.2	£2.2	£2.2
Out of Centre Subtotal	8,751		£11,819	£103.4	£104.3	£105.6	£107.2	£107.5	£108.8
DOVER AREA SUBTOTAL	**11,313**		**£10,768**	**£121.8**	**£122.8**	**£124.4**	**£126.3**	**£126.7**	**£128.2**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	944	(2)	£7,250	£6.8	£6.9	£7.0	£7.1	£7.1	£7.2
Iceland, Queen Street	423	(2)	£5,500	£2.3	£2.3	£2.4	£2.4	£2.4	£2.4
M&S, High Street, Deal	371	(2)	£11,500	£4.3	£4.3	£4.4	£4.4	£4.4	£4.5
Other Convenience Stores	478	(1)	£4,000	£1.9	£1.9	£2.0	£2.0	£2.0	£2.0
In Centre Subtotal	2,216		£6,927	£15.4	£15.5	£15.7	£15.9	£16.0	£16.2
Sainsbury's West Street, Deal	1,812	(2)	£11,000	£19.9	£20.1	£20.4	£20.7	£20.7	£21.0
Edge of Centre Subtotal	1,812		£11,000	£19.9	£20.1	£20.4	£20.7	£20.7	£21.0
Other Convenience Stores	582	(3)	£8,509	£5.0	£5.0	£5.1	£5.1	£5.2	£5.2
Out of Centre Subtotal	582		£8,509	£5.0	£5.0	£5.1	£5.1	£5.2	£5.2
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	497	(1)	£3,555	£1.8	£1.8	£1.8	£1.8	£1.8	£1.9
In Centre Subtotal	497		£3,555	£1.8	£1.8	£1.8	£1.8	£1.8	£1.9
Co-op, Moat Sole Road, Sandwich	808	(2)	£7,250	£5.9	£5.9	£6.0	£6.1	£6.1	£6.2
Edge of Centre Subtotal	808		£7,250	£5.9	£5.9	£6.0	£6.1	£6.1	£6.2
DEAL/SANDWICH AREA SUBTOTAL	**5,915**		**£8,091**	**£47.9**	**£48.2**	**£48.9**	**£49.6**	**£49.8**	**£50.4**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	169	(2)	£7,250	£1.2	£1.2	£1.3	£1.3	£1.3	£1.3
Other Convenience Stores	23	(3)	£3,000	£0.1	£0.1	£0.1	£0.1	£0.1	£0.1
Subtotal	192		£6,749	£1.3	£1.3	£1.3	£1.3	£1.3	£1.4
LOCAL CENTRES									
Convenience Stores	788	(3)	£5,000	£3.9	£4.0	£4.0	£4.1	£4.1	£4.1
Subtotal	788		£5,000	£3.9	£4.0	£4.0	£4.1	£4.1	£4.1
VILLAGES AND HAMLETS									
Convenience Stores	119	(3)	£5,000	£0.6	£0.6	£0.6	£0.6	£0.6	£0.6
Subtotal	119		£5,000	£0.6	£0.6	£0.6	£0.6	£0.6	£0.6
ELSEWHERE IN DISTRICT SUBTOTAL	**1,099**		**£5,305**	**£5.8**	**£5.9**	**£6.0**	**£6.0**	**£6.1**	**£6.1**
TOTAL:	**18,326**		**£9,576**	**£175.5**	**£176.9**	**£179.2**	**£181.9**	**£182.5**	**£184.7**

Sources: (1) Experian Goad Centre Reports
(2) IGD Database
(3) SP Estimate informed by available data including results of HTIS 2012 and the Dover Rural Retail Survey 2004.

Notes: Average sales density estimates have been informed by published company averages as set out in Mintel's *'UK Retail Rankings' (discounting* non-retail sales such as VAT & petrol sales, etc.), Verdict reports, the results of the 2012 HTIS and professional judgement. Average sales density for convenience goods grown to each assessment year assuming an annual productivity growth rate of 0% per annum between 2011-2012, 0.2% pa in 2013, 0.2% pa between 2014-2018 and 0.3% pa between 2019-31. Average sales density estimates make an allowance for VAT.

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Convenience Goods Capacity Assessment

TABLE 5: MARKET SHARE ANALYSIS (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	5.6%	2.6%	3.4%	0.0%	0.0%	0.0%	0.3%	2.3%	1.9%
Co-Op, Castle Street	4.1%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Other	2.3%	1.4%	1.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%
In Centre Subtotal	12.0%	4.7%	5.0%	0.0%	0.0%	0.0%	0.3%	2.5%	3.5%
Iceland, High Street	1.7%	2.7%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%
Edge of Centre Subtotal	1.7%	2.7%	0.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%
Morrisons, Bridge Street, Dover	40.9%	28.0%	18.8%	5.3%	3.3%	3.4%	3.9%	4.0%	14.7%
Aldi, Cherry Tree Avenue, Dover	5.3%	6.4%	5.8%	1.0%	1.5%	0.0%	1.5%	0.5%	2.7%
Asda, Charlton Green, Dover	3.6%	0.3%	0.6%	0.3%	0.7%	0.6%	0.7%	0.3%	1.0%
Tesco Extra, White Cliffs Business Park	27.7%	48.6%	33.7%	17.8%	6.9%	12.3%	24.6%	14.0%	22.7%
Farm Foods, Charlton Green, Dover	1.2%	0.8%	0.9%	0.0%	0.7%	0.5%	0.0%	0.3%	0.6%
All other	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.7%
Out of Centre Subtotal	78.8%	89.2%	59.8%	24.3%	13.0%	16.8%	30.8%	19.6%	42.5%
DOVER AREA SUBTOTAL	**92.4%**	**96.5%**	**65.4%**	**24.6%**	**13.0%**	**16.8%**	**31.0%**	**22.1%**	**46.7%**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	0.0%	0.0%	1.7%	4.9%	9.1%	1.3%	0.0%	0.0%	2.1%
Iceland, Queen Street	0.0%	0.0%	0.3%	6.5%	3.7%	0.9%	0.3%	0.0%	1.4%
M&S, High Street, Deal	0.0%	0.0%	2.2%	5.6%	5.4%	0.0%	0.0%	0.0%	1.5%
Other Convenience Stores	0.3%	0.0%	0.9%	2.1%	6.2%	0.0%	0.3%	0.0%	1.2%
In Centre Subtotal	0.3%	0.0%	5.1%	19.2%	24.5%	2.3%	0.6%	0.0%	6.2%
Sainsbury's West Street, Deal	0.0%	1.0%	19.6%	38.6%	54.1%	12.1%	0.7%	0.3%	14.8%
Edge of Centre Subtotal	0.0%	1.0%	19.6%	38.6%	54.1%	12.1%	0.7%	0.3%	14.8%
Other Convenience Stores	0.0%	0.0%	1.9%	11.6%	3.2%	1.2%	0.0%	0.0%	2.0%
Out of Centre Subtotal	0.0%	0.0%	1.9%	11.6%	3.2%	1.2%	0.0%	0.0%	2.0%
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.6%	0.0%	0.8%
In Centre Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.6%	0.0%	0.8%
Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.6%	0.0%	0.0%	23.1%	0.8%	0.0%	3.0%
Edge of Centre Subtotal	0.0%	0.0%	0.6%	0.0%	0.0%	23.1%	0.8%	0.0%	3.0%
DEAL/SANDWICH AREA SUBTOTAL	**0.3%**	**1.0%**	**27.3%**	**69.4%**	**81.7%**	**44.2%**	**2.7%**	**0.3%**	**26.7%**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	7.8%	0.0%	0.9%
Other Convenience Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	8.1%	0.0%	0.9%
LOCAL CENTRES									
Ash	0.0%	0.0%	0.0%	0.0%	0.3%	2.2%	0.3%	0.0%	0.3%
Capel-le-Ferne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Eastry	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.2%
Shepherdswell	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	3.7%	0.6%
Wingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.3%	0.5%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.3%	4.1%	4.9%	4.2%	1.7%
VILLAGES AND HAMLETS	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.3%
ELSEWHERE IN DISTRICT SUBTOTAL	**0.0%**	**0.0%**	**3.1%**	**0.0%**	**0.5%**	**4.1%**	**13.3%**	**4.2%**	**2.9%**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**92.7%**	**97.5%**	**95.8%**	**94.0%**	**95.3%**	**65.1%**	**47.0%**	**26.6%**	**76.3%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	0.0%	0.0%	1.4%	1.7%	2.7%	13.6%	1.9%	0.7%	2.6%
Canterbury	0.9%	1.5%	2.2%	2.0%	1.1%	10.7%	46.9%	17.0%	9.8%
Folkestone	6.2%	0.8%	0.3%	0.0%	0.9%	0.0%	0.5%	42.8%	7.4%
Hawkinge	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.7%	10.2%	1.6%
Hythe	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.3%
Ramsgate	0.0%	0.0%	0.0%	0.7%	0.0%	9.1%	1.0%	0.0%	1.3%
All other shops and stores	0.0%	0.0%	0.3%	1.0%	0.0%	1.5%	1.9%	0.8%	0.6%
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**7.3%**	**2.5%**	**4.2%**	**6.0%**	**4.7%**	**34.9%**	**53.0%**	**73.4%**	**23.7%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Results of NEMS Household Telephone Interview Survey (June 2012) commissioned by Strategic Perspectives.
Notes: Assumes that main food shopping constitutes 65% of total convenience expenditure, secondary shopping 15% and top-up shopping 20%.

62% *£26.7* *£43.1*

Convenience Goods Capacity Assessment

TABLE 6: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2012 £4.0 9%

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.3	£0.7	£0.6	£0.0	£0.0	£0.0	£0.1	£0.7	£4.4
Co-Op, Castle Street	£1.7	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Other	£0.9	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.6
In Centre Subtotal	£5.0	£1.4	£0.8	£0.0	£0.0	£0.0	£0.1	£0.8	£8.0
Iceland, High Street	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Edge of Centre Subtotal	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Morrisons, Bridge Street, Dover	£17.0	£8.1	£3.1	£1.4	£1.0	£1.0	£1.0	£1.3	£33.8
Aldi, Cherry Tree Avenue, Dover	£2.2	£1.8	£0.9	£0.3	£0.5	£0.0	£0.4	£0.2	£6.3
Asda, Charlton Green, Dover	£1.5	£0.1	£0.1	£0.1	£0.2	£0.2	£0.2	£0.1	£2.4
Tesco Extra, White Cliffs Business Park	£11.5	£14.1	£5.5	£4.5	£2.1	£3.5	£6.3	£4.5	£52.0
Farm Foods, Charlton Green, Dover	£0.5	£0.2	£0.1	£0.0	£0.2	£0.1	£0.0	£0.1	£1.3
All other	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.7
Out of Centre Subtotal	£32.7	£25.9	£9.7	£6.2	£4.0	£4.8	£7.9	£6.2	£97.5
DOVER AREA SUBTOTAL	**£38.3**	**£28.0**	**£10.7**	**£6.3**	**£4.0**	**£4.8**	**£8.0**	**£7.0**	**£107.2**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.3	£2.8	£0.4	£0.0	£0.0	£4.7
Iceland, Queen Street	£0.0	£0.0	£0.1	£1.7	£1.2	£0.3	£0.1	£0.0	£3.2
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.4	£1.7	£0.0	£0.0	£0.0	£3.5
Other Convenience Stores	£0.1	£0.0	£0.2	£0.5	£1.9	£0.0	£0.1	£0.0	£2.8
In Centre Subtotal	£0.1	£0.0	£0.8	£4.9	£7.6	£0.6	£0.1	£0.0	£14.2
Sainsbury's West Street, Deal	£0.0	£0.3	£3.2	£9.9	£16.8	£3.4	£0.2	£0.1	£33.8
Edge of Centre Subtotal	£0.0	£0.3	£3.2	£9.9	£16.8	£3.4	£0.2	£0.1	£33.8
Other Convenience Stores	£0.0	£0.0	£0.3	£3.0	£1.0	£0.3	£0.0	£0.0	£4.6
Out of Centre Subtotal	£0.0	£0.0	£0.3	£3.0	£1.0	£0.3	£0.0	£0.0	£4.6
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£0.0	£1.7
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£0.0	£1.7
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£6.5	£0.2	£0.0	£6.8
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£6.5	£0.2	£0.0	£6.8
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.3**	**£4.4**	**£17.7**	**£25.4**	**£12.5**	**£0.7**	**£0.1**	**£61.2**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.0	£0.0	£2.1
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.1	£0.0	£2.2
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.1	£0.0	£0.8
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.5
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£1.2	£1.4
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£1.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.2	£1.3	£1.3	£3.9
VILLAGES AND HAMLETS	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.6
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.5**	**£0.0**	**£0.2**	**£1.2**	**£3.4**	**£1.3**	**£6.6**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£38.4**	**£28.3**	**£15.6**	**£24.0**	**£29.6**	**£18.4**	**£12.1**	**£8.5**	**£175.0**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.2	£0.4	£0.8	£3.8	£0.5	£0.2	£6.0
Canterbury	£0.4	£0.4	£0.4	£0.5	£0.4	£3.0	£12.1	£5.4	£22.5
Folkestone	£2.6	£0.2	£0.0	£0.0	£0.3	£0.0	£0.1	£13.6	£16.9
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.2	£3.6
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£2.6	£0.3	£0.0	£3.0
All other shops and stores	£0.0	£0.0	£0.1	£0.2	£0.0	£0.4	£0.5	£0.3	£1.5
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.0**	**£0.7**	**£0.7**	**£1.5**	**£1.5**	**£9.9**	**£13.6**	**£23.3**	**£54.3**
TOTAL	**£41.5**	**£29.0**	**£16.3**	**£25.6**	**£31.1**	**£28.3**	**£25.7**	**£31.8**	**£229.3**

Source: Tables 3 & 5.

TABLE 7: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2017

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.5	£0.8	£0.6	£0.0	£0.0	£0.0	£0.1	£0.8	£4.7
Co-Op, Castle Street	£1.8	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Other	£1.0	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.7
In Centre Subtotal	£5.3	£1.4	£0.9	£0.0	£0.0	£0.0	£0.1	£0.9	£8.5
Iceland, High Street	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.7
Edge of Centre Subtotal	£0.7	£0.8	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.7
Morrisons, Bridge Street, Dover	£18.0	£8.6	£3.2	£1.4	£1.1	£1.0	£1.1	£1.4	£35.9
Aldi, Cherry Tree Avenue, Dover	£2.4	£2.0	£1.0	£0.3	£0.5	£0.0	£0.4	£0.2	£6.7
Asda, Charlton Green, Dover	£1.6	£0.1	£0.1	£0.1	£0.2	£0.2	£0.2	£0.1	£2.5
Tesco Extra, White Cliffs Business Park	£12.2	£15.0	£5.8	£4.8	£2.3	£3.7	£6.7	£4.7	£55.3
Farm Foods, Charlton Green, Dover	£0.5	£0.2	£0.2	£0.0	£0.2	£0.1	£0.0	£0.1	£1.4
All other	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.8
Out of Centre Subtotal	£34.7	£27.5	£10.3	£6.6	£4.3	£5.1	£8.4	£6.6	£103.6
DOVER AREA SUBTOTAL	**£40.7**	**£29.8**	**£11.3**	**£6.7**	**£4.3**	**£5.1**	**£8.5**	**£7.5**	**£113.8**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.3	£3.0	£0.4	£0.0	£0.0	£5.0
Iceland, Queen Street	£0.0	£0.0	£0.1	£1.8	£1.2	£0.3	£0.1	£0.0	£3.4
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.5	£1.8	£0.0	£0.0	£0.0	£3.7
Other Convenience Stores	£0.1	£0.0	£0.2	£0.6	£2.1	£0.0	£0.1	£0.0	£3.0
In Centre Subtotal	£0.1	£0.0	£0.9	£5.2	£8.1	£0.7	£0.2	£0.0	£15.1
Sainsbury's West Street, Deal	£0.0	£0.3	£3.4	£10.5	£17.8	£3.6	£0.2	£0.1	£35.9
Edge of Centre Subtotal	£0.0	£0.3	£3.4	£10.5	£17.8	£3.6	£0.2	£0.1	£35.9
Other Convenience Stores	£0.0	£0.0	£0.3	£3.2	£1.0	£0.4	£0.0	£0.0	£4.9
Out of Centre Subtotal	£0.0	£0.0	£0.3	£3.2	£1.0	£0.4	£0.0	£0.0	£4.9
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.2	£0.0	£1.8
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.2	£0.0	£1.8
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£6.9	£0.2	£0.0	£7.3
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£6.9	£0.2	£0.0	£7.3
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.3**	**£4.7**	**£18.8**	**£27.0**	**£13.3**	**£0.7**	**£0.1**	**£65.1**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.1	£0.0	£2.2
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.2	£0.0	£2.3
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.0	£0.8
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.5
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£1.2	£1.5
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£1.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.2	£1.3	£1.4	£4.1
VILLAGES AND HAMLETS	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.6
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.5**	**£0.0**	**£0.2**	**£1.2**	**£3.6**	**£1.4**	**£7.0**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£40.8**	**£30.1**	**£16.6**	**£25.5**	**£31.4**	**£19.6**	**£12.8**	**£9.0**	**£185.9**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.2	£0.5	£0.9	£4.1	£0.5	£0.2	£6.4
Canterbury	£0.4	£0.5	£0.4	£0.5	£0.4	£3.2	£12.8	£5.7	£23.9
Folkestone	£2.7	£0.2	£0.1	£0.0	£0.3	£0.0	£0.1	£14.5	£17.9
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.4	£3.8
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.8
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£2.7	£0.3	£0.0	£3.2
All other shops and stores	£0.0	£0.0	£0.1	£0.3	£0.0	£0.4	£0.5	£0.3	£1.6
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.2**	**£0.8**	**£0.7**	**£1.6**	**£1.6**	**£10.5**	**£14.5**	**£24.8**	**£57.6**
TOTAL	**£44.1**	**£30.9**	**£17.3**	**£27.2**	**£33.0**	**£30.1**	**£27.3**	**£33.8**	**£243.5**

Source: Tables 3 & 5.

TABLE 8: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2022

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.6	£0.8	£0.6	£0.0	£0.0	£0.0	£0.1	£0.8	£5.0
Co-Op, Castle Street	£2.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Other	£1.1	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.9
In Centre Subtotal	£5.7	£1.5	£0.9	£0.0	£0.0	£0.0	£0.1	£0.9	£9.1
Iceland, High Street	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Edge of Centre Subtotal	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Morrisons, Bridge Street, Dover	£19.4	£9.3	£3.5	£1.5	£1.2	£1.1	£1.1	£1.5	£38.5
Aldi, Cherry Tree Avenue, Dover	£2.5	£2.1	£1.1	£0.3	£0.5	£0.0	£0.4	£0.2	£7.2
Asda, Charlton Green, Dover	£1.7	£0.1	£0.1	£0.1	£0.2	£0.2	£0.2	£0.1	£2.7
Tesco Extra, White Cliffs Business Park	£13.1	£16.1	£6.3	£5.2	£2.4	£4.0	£7.2	£5.1	£59.4
Farm Foods, Charlton Green, Dover	£0.6	£0.3	£0.2	£0.0	£0.2	£0.2	£0.0	£0.1	£1.5
All other	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.9
Out of Centre Subtotal	£37.3	£29.6	£11.1	£7.1	£4.6	£5.4	£9.0	£7.1	£111.2
DOVER AREA SUBTOTAL	**£43.7**	**£32.0**	**£12.2**	**£7.2**	**£4.6**	**£5.4**	**£9.1**	**£8.0**	**£122.2**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.4	£3.2	£0.4	£0.0	£0.0	£5.4
Iceland, Queen Street	£0.0	£0.0	£0.1	£1.9	£1.3	£0.3	£0.1	£0.0	£3.7
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.6	£1.9	£0.0	£0.0	£0.0	£4.0
Other Convenience Stores	£0.1	£0.0	£0.2	£0.6	£2.2	£0.0	£0.1	£0.0	£3.2
In Centre Subtotal	£0.1	£0.0	£1.0	£5.6	£8.7	£0.7	£0.2	£0.0	£16.2
Sainsbury's West Street, Deal	£0.0	£0.3	£3.6	£11.2	£19.1	£3.9	£0.2	£0.1	£38.6
Edge of Centre Subtotal	£0.0	£0.3	£3.6	£11.2	£19.1	£3.9	£0.2	£0.1	£38.6
Other Convenience Stores	£0.0	£0.0	£0.4	£3.4	£1.1	£0.4	£0.0	£0.0	£5.3
Out of Centre Subtotal	£0.0	£0.0	£0.4	£3.4	£1.1	£0.4	£0.0	£0.0	£5.3
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.2	£0.0	£2.0
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.2	£0.0	£2.0
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£7.5	£0.2	£0.0	£7.8
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£7.5	£0.2	£0.0	£7.8
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.3**	**£5.1**	**£20.2**	**£28.9**	**£14.3**	**£0.8**	**£0.1**	**£69.8**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.3	£0.0	£2.4
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.4	£0.0	£2.5
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.0	£0.9
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.5
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£1.3	£1.7
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.1	£1.2
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.3	£1.4	£1.5	£4.4
VILLAGES AND HAMLETS	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.7
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.2**	**£1.3**	**£3.9**	**£1.5**	**£7.5**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£43.8**	**£32.3**	**£17.8**	**£27.4**	**£33.7**	**£21.0**	**£13.8**	**£9.7**	**£199.6**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.3	£0.5	£0.9	£4.4	£0.6	£0.2	£6.9
Canterbury	£0.4	£0.5	£0.4	£0.6	£0.4	£3.4	£13.8	£6.1	£25.7
Folkestone	£2.9	£0.3	£0.1	£0.0	£0.3	£0.0	£0.2	£15.5	£19.2
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.7	£4.1
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.9
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£2.9	£0.3	£0.0	£3.4
All other shops and stores	£0.0	£0.0	£0.1	£0.3	£0.0	£0.5	£0.6	£0.3	£1.7
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.5**	**£0.8**	**£0.8**	**£1.7**	**£1.7**	**£11.3**	**£15.5**	**£26.6**	**£61.9**
TOTAL	**£47.3**	**£33.1**	**£18.6**	**£29.2**	**£35.4**	**£32.3**	**£29.3**	**£36.3**	**£261.4**

Source: Tables 3 & 5.

DOVER DISTRICT COUNCIL
2012 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

TABLE 9: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2026

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.7	£0.9	£0.7	£0.0	£0.0	£0.0	£0.1	£0.9	£5.2
Co-Op, Castle Street	£2.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Other	£1.1	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.9
In Centre Subtotal	£5.9	£1.6	£1.0	£0.0	£0.0	£0.0	£0.1	£0.9	£9.4
Iceland, High Street	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Edge of Centre Subtotal	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Morrisons, Bridge Street, Dover	£20.0	£9.6	£3.6	£1.6	£1.2	£1.1	£1.2	£1.5	£39.7
Aldi, Cherry Tree Avenue, Dover	£2.6	£2.2	£1.1	£0.3	£0.6	£0.0	£0.5	£0.2	£7.4
Asda, Charlton Green, Dover	£1.7	£0.1	£0.1	£0.1	£0.3	£0.2	£0.2	£0.1	£2.8
Tesco Extra, White Cliffs Business Park	£13.5	£16.6	£6.5	£5.3	£2.5	£4.1	£7.5	£5.2	£61.2
Farm Foods, Charlton Green, Dover	£0.6	£0.3	£0.2	£0.0	£0.3	£0.2	£0.0	£0.1	£1.6
All other	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.0
Out of Centre Subtotal	£38.4	£30.5	£11.5	£7.3	£4.8	£5.6	£9.3	£7.3	£114.7
DOVER AREA SUBTOTAL	**£45.1**	**£33.0**	**£12.5**	**£7.4**	**£4.8**	**£5.6**	**£9.4**	**£8.3**	**£126.1**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.5	£3.3	£0.4	£0.0	£0.0	£5.6
Iceland, Queen Street	£0.0	£0.0	£0.1	£2.0	£1.4	£0.3	£0.1	£0.0	£3.8
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.7	£2.0	£0.0	£0.0	£0.0	£4.1
Other Convenience Stores	£0.1	£0.0	£0.2	£0.6	£2.3	£0.0	£0.1	£0.0	£3.3
In Centre Subtotal	£0.1	£0.0	£1.0	£5.8	£8.9	£0.8	£0.2	£0.0	£16.8
Sainsbury's West Street, Deal	£0.0	£0.3	£3.8	£11.6	£19.8	£4.0	£0.2	£0.1	£39.8
Edge of Centre Subtotal	£0.0	£0.3	£3.8	£11.6	£19.8	£4.0	£0.2	£0.1	£39.8
Other Convenience Stores	£0.0	£0.0	£0.4	£3.5	£1.2	£0.4	£0.0	£0.0	£5.4
Out of Centre Subtotal	£0.0	£0.0	£0.4	£3.5	£1.2	£0.4	£0.0	£0.0	£5.4
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.2	£0.0	£2.0
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.2	£0.0	£2.0
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£7.7	£0.2	£0.0	£8.1
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£7.7	£0.2	£0.0	£8.1
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.3**	**£5.2**	**£20.9**	**£29.9**	**£14.7**	**£0.8**	**£0.1**	**£72.1**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.4	£0.0	£2.5
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.4	£0.0	£2.5
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.0	£0.9
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.4	£1.7
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.1	£1.3
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.4	£1.5	£1.6	£4.5
VILLAGES AND HAMLETS	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.7
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.2**	**£1.4**	**£4.0**	**£1.6**	**£7.8**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£45.2**	**£33.3**	**£18.4**	**£28.3**	**£34.8**	**£21.7**	**£14.2**	**£10.0**	**£205.9**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.3	£0.5	£1.0	£4.5	£0.6	£0.3	£7.1
Canterbury	£0.5	£0.5	£0.4	£0.6	£0.4	£3.6	£14.2	£6.3	£26.5
Folkestone	£3.0	£0.3	£0.1	£0.0	£0.3	£0.0	£0.2	£16.0	£19.9
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.8	£4.2
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.9
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£3.0	£0.3	£0.0	£3.5
All other shops and stores	£0.0	£0.0	£0.1	£0.3	£0.0	£0.5	£0.6	£0.3	£1.7
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.6**	**£0.9**	**£0.8**	**£1.8**	**£1.7**	**£11.6**	**£16.0**	**£27.5**	**£63.9**
TOTAL	**£48.8**	**£34.2**	**£19.2**	**£30.1**	**£36.5**	**£33.3**	**£30.2**	**£37.4**	**£269.8**

Source: Tables 3 & 5.

TABLE 10: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2027

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.8	£0.9	£0.7	£0.0	£0.0	£0.0	£0.1	£0.9	£5.3
Co-Op, Castle Street	£2.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Other	£1.1	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£1.9
In Centre Subtotal	£5.9	£1.6	£1.0	£0.0	£0.0	£0.0	£0.1	£1.0	£9.6
Iceland, High Street	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£2.0
Edge of Centre Subtotal	£0.8	£0.9	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£2.0
Morrisons, Bridge Street, Dover	£20.2	£9.7	£3.6	£1.6	£1.2	£1.1	£1.2	£1.5	£40.3
Aldi, Cherry Tree Avenue, Dover	£2.6	£2.2	£1.1	£0.3	£0.6	£0.0	£0.5	£0.2	£7.5
Asda, Charlton Green, Dover	£1.8	£0.1	£0.1	£0.1	£0.3	£0.2	£0.2	£0.1	£2.9
Tesco Extra, White Cliffs Business Park	£13.7	£16.8	£6.5	£5.4	£2.5	£4.2	£7.6	£5.3	£62.1
Farm Foods, Charlton Green, Dover	£0.6	£0.3	£0.2	£0.0	£0.3	£0.2	£0.0	£0.1	£1.6
All other	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.0
Out of Centre Subtotal	£39.0	£30.9	£11.6	£7.4	£4.8	£5.7	£9.4	£7.4	£116.3
DOVER AREA SUBTOTAL	**£45.7**	**£33.4**	**£12.7**	**£7.5**	**£4.8**	**£5.7**	**£9.5**	**£8.4**	**£127.8**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.5	£3.4	£0.4	£0.0	£0.0	£5.6
Iceland, Queen Street	£0.0	£0.0	£0.1	£2.0	£1.4	£0.3	£0.1	£0.0	£3.8
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.7	£2.0	£0.0	£0.0	£0.0	£4.2
Other Convenience Stores	£0.1	£0.0	£0.2	£0.7	£2.3	£0.0	£0.1	£0.0	£3.4
In Centre Subtotal	£0.1	£0.0	£1.0	£5.9	£9.1	£0.8	£0.2	£0.0	£17.0
Sainsbury's West Street, Deal	£0.0	£0.3	£3.8	£11.8	£20.0	£4.1	£0.2	£0.1	£40.3
Edge of Centre Subtotal	£0.0	£0.3	£3.8	£11.8	£20.0	£4.1	£0.2	£0.1	£40.3
Other Convenience Stores	£0.0	£0.0	£0.4	£3.5	£1.2	£0.4	£0.0	£0.0	£5.5
Out of Centre Subtotal	£0.0	£0.0	£0.4	£3.5	£1.2	£0.4	£0.0	£0.0	£5.5
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.2	£0.0	£2.1
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.2	£0.0	£2.1
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£7.8	£0.3	£0.0	£8.2
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£7.8	£0.3	£0.0	£8.2
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.3**	**£5.3**	**£21.2**	**£30.3**	**£14.9**	**£0.8**	**£0.1**	**£73.0**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.4	£0.0	£2.5
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.5	£0.0	£2.6
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.7	£0.1	£0.0	£0.9
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.4	£1.7
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.1	£1.3
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.4	£1.5	£1.6	£4.6
VILLAGES AND HAMLETS	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.7
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.2**	**£1.4**	**£4.1**	**£1.6**	**£7.9**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£45.8**	**£33.8**	**£18.6**	**£28.7**	**£35.3**	**£22.0**	**£14.4**	**£10.1**	**£208.7**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.3	£0.5	£1.0	£4.6	£0.6	£0.3	£7.2
Canterbury	£0.5	£0.5	£0.4	£0.6	£0.4	£3.6	£14.4	£6.4	£26.8
Folkestone	£3.0	£0.3	£0.1	£0.0	£0.3	£0.0	£0.2	£16.2	£20.1
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£3.9	£4.3
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.9
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£3.1	£0.3	£0.0	£3.6
All other shops and stores	£0.0	£0.0	£0.1	£0.3	£0.0	£0.5	£0.6	£0.3	£1.8
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.6**	**£0.9**	**£0.8**	**£1.8**	**£1.8**	**£11.8**	**£16.2**	**£27.8**	**£64.7**
TOTAL	**£49.5**	**£34.6**	**£19.4**	**£30.5**	**£37.0**	**£33.8**	**£30.6**	**£37.9**	**£273.4**

Source: Tables 3 & 5.

TABLE 11: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2031

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE									
M&S, Biggin Street	£2.9	£0.9	£0.7	£0.0	£0.0	£0.0	£0.1	£0.9	£5.6
Co-Op, Castle Street	£2.2	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Other	£1.2	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£2.0
In Centre Subtotal	£6.3	£1.7	£1.0	£0.0	£0.0	£0.0	£0.1	£1.0	£10.1
Iceland, High Street	£0.9	£1.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£2.1
Edge of Centre Subtotal	£0.9	£1.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£2.1
Morrisons, Bridge Street, Dover	£21.4	£10.2	£3.9	£1.7	£1.3	£1.2	£1.3	£1.6	£42.6
Aldi, Cherry Tree Avenue, Dover	£2.8	£2.3	£1.2	£0.3	£0.6	£0.0	£0.5	£0.2	£7.9
Asda, Charlton Green, Dover	£1.9	£0.1	£0.1	£0.1	£0.3	£0.2	£0.2	£0.1	£3.0
Tesco Extra, White Cliffs Business Park	£14.5	£17.8	£6.9	£5.7	£2.7	£4.4	£8.0	£5.6	£65.6
Farm Foods, Charlton Green, Dover	£0.7	£0.3	£0.2	£0.0	£0.3	£0.2	£0.0	£0.1	£1.7
All other	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.1
Out of Centre Subtotal	£41.2	£32.7	£12.3	£7.9	£5.1	£6.0	£10.0	£7.9	£122.9
DOVER AREA SUBTOTAL	**£48.3**	**£35.4**	**£13.4**	**£7.9**	**£5.1**	**£6.0**	**£10.1**	**£8.9**	**£135.1**
DEAL DISTRICT CENTRE									
Co-Op, Park Street	£0.0	£0.0	£0.3	£1.6	£3.6	£0.5	£0.0	£0.0	£6.0
Iceland, Queen Street	£0.0	£0.0	£0.1	£2.1	£1.5	£0.3	£0.1	£0.0	£4.1
M&S, High Street, Deal	£0.0	£0.0	£0.4	£1.8	£2.1	£0.0	£0.0	£0.0	£4.4
Other Convenience Stores	£0.1	£0.0	£0.2	£0.7	£2.4	£0.0	£0.1	£0.0	£3.5
In Centre Subtotal	£0.1	£0.0	£1.1	£6.2	£9.6	£0.8	£0.2	£0.0	£18.0
Sainsbury's West Street, Deal	£0.0	£0.4	£4.0	£12.4	£21.2	£4.3	£0.2	£0.1	£42.6
Edge of Centre Subtotal	£0.0	£0.4	£4.0	£12.4	£21.2	£4.3	£0.2	£0.1	£42.6
Other Convenience Stores	£0.0	£0.0	£0.4	£3.7	£1.2	£0.4	£0.0	£0.0	£5.8
Out of Centre Subtotal	£0.0	£0.0	£0.4	£3.7	£1.2	£0.4	£0.0	£0.0	£5.8
SANDWICH RURAL SERVICE CENTRE									
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.2	£0.0	£2.2
In Centre Subtotal	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.2	£0.0	£2.2
Co-op, Moat Sole Road, Sandwich	£0.0	£0.0	£0.1	£0.0	£0.0	£8.2	£0.3	£0.0	£8.6
Edge of Centre Subtotal	£0.0	£0.0	£0.1	£0.0	£0.0	£8.2	£0.3	£0.0	£8.6
DEAL/SANDWICH AREA SUBTOTAL	**£0.1**	**£0.4**	**£5.6**	**£22.4**	**£32.0**	**£15.8**	**£0.9**	**£0.1**	**£77.2**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE									
Co-Op, Market Square	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.5	£0.0	£2.6
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£2.6	£0.0	£2.7
LOCAL CENTRES									
Ash	£0.0	£0.0	£0.0	£0.0	£0.1	£0.8	£0.1	£0.0	£1.0
Capel-le-Ferne	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Eastry	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.6
Shepherdswell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.5	£1.8
Wingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.1	£1.3
Subtotal	£0.0	£0.0	£0.0	£0.0	£0.1	£1.5	£1.6	£1.7	£4.9
VILLAGES AND HAMLETS	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.7
ELSEWHERE IN DISTRICT SUBTOTAL	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.2**	**£1.5**	**£4.3**	**£1.7**	**£8.3**
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£48.5**	**£35.7**	**£19.7**	**£30.3**	**£37.3**	**£23.3**	**£15.2**	**£10.7**	**£220.6**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT									
Westwood Cross	£0.0	£0.0	£0.3	£0.5	£1.0	£4.8	£0.6	£0.3	£7.6
Canterbury	£0.5	£0.5	£0.5	£0.6	£0.4	£3.8	£15.2	£6.8	£28.4
Folkestone	£3.2	£0.3	£0.1	£0.0	£0.4	£0.0	£0.2	£17.2	£21.3
Hawkinge	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£4.1	£4.5
Hythe	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£1.0
Ramsgate	£0.0	£0.0	£0.0	£0.2	£0.0	£3.3	£0.3	£0.0	£3.8
All other shops and stores	£0.0	£0.0	£0.1	£0.3	£0.0	£0.5	£0.6	£0.3	£1.9
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£3.8**	**£0.9**	**£0.9**	**£1.9**	**£1.9**	**£12.4**	**£17.2**	**£29.4**	**£68.4**
TOTAL	**£52.3**	**£36.6**	**£20.5**	**£32.2**	**£39.2**	**£35.7**	**£32.4**	**£40.1**	**£289.1**

Source: Tables 3 & 5.

TABLE 12: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1 - 8)

	2012	2017	2022	2026	2027	2031
DOVER TRADE AREA	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
DEAL AND SANDWICH TRADE AREA	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
ALL OTHER	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%

Source: SP Estimate informed by previous the Economic Impact of Tourism on Kent and Medway (December 2010). Areas include "in" and "edge" and "out" of centre stores.

TABLE 13: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN DISTRICT

	2012	2017	2022	2026	2027	2031
DOVER TRADE AREA	£120.0	£127.5	£136.9	£141.2	£143.1	£151.3
DEAL AND SANDWICH TRADE AREA	£66.1	£70.3	£75.4	£77.8	£78.9	£83.4
ALL OTHER	£6.7	£7.1	£7.7	£7.9	£8.0	£8.5
DISTRICT AREA TOTAL:	**£192.9**	**£204.9**	**£220.0**	**£227.0**	**£230.0**	**£243.2**

Source: Tables 6 - 12.

TABLE 14: CONVENIENCE GOODS CAPACITY ASSESSMENT - BASELINE

		2012	2017	2022	2026	2027	2031
STEP 1:	**TOTAL EXISTING FLOORSPACE IN DISTRICT (sqm net):**	18,326	18,326	18,326	18,326	18,326	18,326
STEP 2:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£ m):**						
	(i) Total 'Potential' Turnover (£ million):	£192.9	£204.9	£220.0	£227.0	£230.0	£243.2
	(ii) Average Sales Density (£ per sq.m):	£10,525	£11,179	£12,002	£12,385	£12,551	£13,270
STEP 3:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£ m):**						
	(i) Total 'Benchmark' Turnover (£ million):	£175.5	£176.9	£179.2	£181.9	£182.5	£184.7
	(ii) Average Sales Density (£ per sq.m):	£9,576	£9,653	£9,779	£9,927	£9,957	£10,077
STEP 4:	**NET RESIDUAL EXPENDITURE (£m) NOT INCLUDING COMMITMENTS**	**£17.4**	**£28.0**	**£40.7**	**£45.1**	**£47.5**	**£58.5**

Source: Tables 4 & 13.

TABLE 15: ADDITIONAL EXPENDITURE ARISING AS A RESULT OF PLANNED HOUSING GROWTH

		2012	2017	2022	2026	2027	2031
Assumptions							
Average persons per dwelling	2.3						
Average spend per person (£/ person)		£1,908	£1,927	£1,977	£2,014	£2,024	£2,071
Average retention rate within District across survey zones	76.3%						
Core Strategy Housing Targets (CP 3)							
Dover		378	2,372	4,620	5,900	6,536	9,080
Deal & Sandwich		144	858	1,458	1,650	1,650	1,650
Aylesham		90	550	994	1,170	1,170	1,170
All other		68	402	674	770	770	770
Subtotal		680	4,182	7,746	9,490	10,126	12,670
Total additional people:							
Dover		869	5,456	10,626	13,570	15,033	20,884
Deal & Sandwich		331	1,973	3,353	3,795	3,795	3,795
Aylesham		207	1,265	2,286	2,691	2,691	2,691
All other		156	925	1,550	1,771	1,771	1,771
Subtotal		1,564	9,619	17,816	21,827	23,290	29,141
Total eximated additional expenditure from planned housing growth							
Dover		£1.3	£8.0	£16.0	£20.9	£23.2	£33.0
Deal & Sandwich		£0.5	£2.9	£5.1	£5.8	£5.9	£6.0
Aylesham		£0.3	£1.9	£3.5	£4.1	£4.2	£4.3
All other		£0.2	£1.4	£2.3	£2.7	£2.7	£2.8
TOTAL		**£2.3**	**£14.1**	**£26.9**	**£33.6**	**£36.0**	**£46.1**

Source: Planned housing growth up to 2026 and 2031 taken from Policy CP3 of Dover District Council Adopted Core Strategy. Please note that these figures take into account esimates of completions up to 2011. Targets per trade area in 2012, 2017 and 2022 taken as SP estimate based on share of total planned housing growth. Average persons per household (in 2010) derived from data provided by Kent County Council. Average expenditure per capita taken as average of all zones. Average retention rate within District taken from Table 5.

TABLE 16: COMMITTED RETAIL DEVELOPMENTS & STRATEGIC ALLOCATIONS

	Estimated Conv Sales Area (sqm net)	Average Sales Density (£ per sqm)	2012	2017	2022	2026	2027	2031
Commitments								
St James Development, Dover	3,205	£12,000	£38.5	£38.8	£39.3	£39.9	£40.0	£40.5
Strategic Allocations								
Dover Waterfront	3,500	£12,000	£42.0	£42.3	£42.9	£43.5	£43.7	£44.2
Whitfield Urban Extension	668	£7,000	£4.7	£4.7	£4.8	£4.8	£4.9	£4.9
			£85.1	**£85.8**	**£86.9**	**£88.2**	**£88.5**	**£89.6**

Source: St. James figures taken from planning permission reference DOV/11/01056. Retail floorspace proposed as part of the Whitfield Urban Extension is an estimate taken from the Barton Wilmore Retail Study 2010. Retail floorspace proposed as part of the Dover Waterfront strategic allocation is a working assumption provided by Dover District Council and will be subject to refinement through progression of the Masterplan. Average sales densities taken as SP estimates based on performance of major convenince retailers.

Notes: Average sales density for convenience goods grown to each assessment year assuming an annual productivity growth rate of 0% per annum between 2011-2012, 0.2% pa in 2013, 0.2% pa between 2014-2018 and 0.3% pa between 2019-31. Average sales density estimates make an allowance for VAT.

TABLE 17: SHARE OF NET RESIDUAL EXPENDITURE AVAILABLE EXPENDITURE

	2012 Market Share (%)
DOVER TRADE AREA	62%
DEAL/SANDWICH AREA	34%
OTHER	3%

Source: Estimated share of projected capacity derived from 2012 HTIS.

Convenience Goods Capacity Assessment

TABLE 18a: FLOORSPACE REQUIREMENTS FOR DOVER TRADE AREA UP TO 2031

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£17.4	£28.0	£40.7	£45.1	£47.5	£58.5
Additional expenditure from planned housing	£2.3	£14.1	£26.9	£33.6	£36.0	£46.1
DOVER TRADE AREA						
Net residual expenditure (not including commitments)	£10.8	£17.4	£25.3	£28.0	£29.6	£36.41
Additional expenditure from planned housing	£1.3	£8.0	£16.0	£20.9	£23.2	£33.0
Commitments	-£38.5	-£38.8	-£39.3	-£39.9	-£40.0	-£40.5
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE IN DOVER TRADE AREA	**-£26.4**	**-£13.3**	**£2.1**	**£9.0**	**£12.8**	**£29.0**
CAPACITY FOR NEW SUPERSTORE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,120	£12,291	£12,439	£12,477	£12,627
(ii) Net Floorspace Capacity (sq m):	-2,198	-1,101	172	726	1,028	2,293
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-3,140	-1,573	245	1,037	1,469	3,276
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,060	£6,146	£6,220	£6,238	£6,313
(ii) Net Floorspace Capacity (sq m):	-4,396	-2,202	343	1,452	2,056	4,587
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-6,279	-3,146	491	2,075	2,937	6,552

Source: District wide figures taken from Tables 14 & 15. Share of residual expenditure derived from Table 17. Forecast capacity based on constant market shares.

TABLE 18b: FLOORSPACE REQUIREMENTS FOR DOVER TRADE AREA UP TO 2031 (INCLUDING STRATEGIC ALLOCATIONS)

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£17.4	£28.0	£40.7	£45.1	£47.5	£58.5
Additional expenditure from planned housing	£2.3	£14.1	£26.9	£33.6	£36.0	£46.1
DOVER TRADE AREA						
Net residual expenditure (not including commitments)	£10.8	£17.4	£25.3	£28.03	£29.6	£36.4
Additional expenditure from planned housing	£1.3	£8.0	£16.0	£20.9	£23.2	£33.0
Commitments and Strategic Allocations	-£85.1	-£85.8	-£86.9	-£88.2	-£88.5	-£89.6
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE IN DOVER TRADE AREA	**-£73.0**	**-£60.4**	**-£45.6**	**-£39.3**	**-£35.7**	**-£20.2**
CAPACITY FOR NEW SUPERSTORE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,120	£12,291	£12,439	£12,477	£12,627
(ii) Net Floorspace Capacity (sq m):	-6,087	-4,983	-3,706	-3,163	-2,861	-1,596
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-8,696	-7,118	-5,294	-4,519	-4,088	-2,280
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,060	£6,146	£6,220	£6,238	£6,313
(ii) Net Floorspace Capacity (sq m):	-12,174	-9,965	-7,412	-6,326	-5,723	-3,192
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-17,392	-14,236	-10,589	-9,038	-8,175	-4,560

Source: District wide figures taken from Tables 14 & 15. Share of residual expenditure derived from Table 17. Forecast capacity based on constant market shares.

TABLE 19: FLOORSPACE REQUIREMENTS FOR DEAL AND SANDWICH UP TO 2031

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£17.4	£28.0	£40.7	£45.1	£47.5	£58.5
Additional expenditure from planned housing	£2.3	£14.1	£26.9	£33.6	£36.0	£46.1
DEAL AND SANDWICH TRADE AREA						
Net residual expenditure (not including commitments)	£6.0	£9.6	£14.0	£15.5	£16.3	£20.1
Additional expenditure from planned housing	£0.5	£2.9	£5.1	£5.8	£5.9	£6.0
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE IN DEAL & SANDWICH	**£6.4**	**£12.5**	**£19.0**	**£21.3**	**£22.2**	**£26.1**
CAPACITY FOR NEW SUPERSTORE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,120	£12,291	£12,439	£12,477	£12,627
(ii) Net Floorspace Capacity (sq m):	537	1,030	1,548	1,711	1,777	2,064
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	767	1,472	2,212	2,445	2,538	2,949
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,060	£6,146	£6,220	£6,238	£6,313
(ii) Net Floorspace Capacity (sq m):	1,074	2,061	3,097	3,422	3,554	4,129
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	1,534	2,944	4,424	4,889	5,077	5,898

Source: District wide figures taken from Tables 14 & 15. Share of residual expenditure derived from Table 17. Forecast capacity based on constant market shares.

TABLE 20: BREAKDOWN OF FLOORSPACE REQUIREMENTS FOR ALL OTHER IN DISTRICT UP TO 2031

Convenience Goods Capacity Assessment

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£17.4	£28.0	£40.7	£45.1	£47.5	£58.5
Additional expenditure from planned housing	£2.3	£14.1	£26.9	£33.6	£36.0	£46.1
ALL OTHER IN DISTRICT						
Net residual expenditure (not including commitments)	£0.6	£1.0	£1.4	£1.6	£1.7	£2.04
Additional expenditure from planned housing	£0.5	£3.2	£5.8	£6.9	£6.9	£7.1
Commitments	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE IN ALL OTHER CENTRES	**£1.1**	**£4.2**	**£7.2**	**£8.4**	**£8.6**	**£9.1**
CAPACITY FOR NEW SUPERSTORE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,120	£12,291	£12,439	£12,477	£12,627
(ii) Net Floorspace Capacity (sq m):	95	346	587	678	686	720
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	135	495	838	968	979	1,029
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,060	£6,146	£6,220	£6,238	£6,313
(ii) Net Floorspace Capacity (sq m):	189	692	1,173	1,356	1,371	1,441
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	270	989	1,676	1,937	1,959	2,058

Source: District wide figures taken from Tables 14 & 15. Share of residual expenditure derived from Table 17. Forecast capacity based on constant market shares.

-934	1,652	4,442	5,504		7,863

TABLE 21: BENCHMARK' & TOTAL 'POTENTIAL' TURNOVER LEVELS OF EXISTING STORES/ FLOORSPACE

	2012 'Benchmark' Turnover	2012 'Potential' Turnover	Difference (£m)	Difference (%)
DOVER SUB REGIONAL CENTRE				
M&S, Biggin Street	£5.6	£4.9	-£0.7	-12.4%
Co-Op, Castle Street	£8.2	£2.2	-£6.0	-73.1%
All other in centre stores	£2.2	£1.8	-£0.4	-18.0%
Iceland, High Street	£2.3	£1.8	-£0.5	-21.2%
Morrisons, Bridge Street, Dover	£43.4	£37.8	-£5.6	-13.0%
Aldi, Cherry Tree Avenue, Dover	£2.6	£7.0	£4.4	166.7%
Asda, Charlton Green, Dover	£12.2	£2.7	-£9.6	-78.1%
Tesco Extra, White Cliffs Business Park	£41.3	£58.3	£17.0	41.0%
Farm Foods, Charlton Green, Dover	£1.7	£1.5	-£0.2	-10.6%
All other out of centre stores	£2.1	£1.9	-£0.2	-10.3%
DOVER SUBTOTAL	**£121.8**	**£120.0**	**-£1.8**	**-1.5%**
DEAL DISTRICT CENTRE				
Co-Op, Park Street	£6.8	£5.1	-£1.7	-25.4%
Iceland, Queen Street	£2.3	£3.5	£1.1	49.3%
M&S, High Street, Deal	£4.3	£3.8	-£0.5	-11.8%
All other in centre stores	£1.9	£3.0	£1.1	59.0%
Sainsbury's West Street, Deal	£19.9	£36.5	£16.6	83.3%
All other out of centre stores	£5.0	£5.0	£0.0	0.4%
SANDWICH RURAL SERVICE CENTRE				
In centre stores	£1.8	£1.8	£0.0	0.0%
Co-op, Moat Sole Road, Sandwich	£5.9	£7.0	£1.1	19.3%
DEAL/SANDWICH SUBTOTAL	**£47.9**	**£65.6**	**£17.8**	**37.1%**
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE				
Co-Op, Market Square	£1.2	£2.1	£0.9	73.5%
All other in centre stores	£0.1	£0.1	£0.0	0.0%
LOCAL CENTRES	£3.9	£3.9	£0.0	0.0%
VILLAGES AND HAMLETS	£0.6	£0.6	£0.0	0.0%
ALL OTHER SUBTOTAL	**£5.8**	**£6.7**	**£0.9**	**15.5%**

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Comparison Goods 2012 Capacity Assessment

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2012 - 2031)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	24,612	25,876	27,077	27,427	27,658	28,581	16.1%
Zone 2:	16,284	17,121	17,915	18,147	18,300	18,911	16.1%
Zone 3:	8,128	8,546	8,943	9,058	9,135	9,440	16.1%
Zone 4:	13,795	14,504	15,177	15,373	15,503	16,020	16.1%
Zone 5:	16,119	16,947	17,733	17,963	18,114	18,718	16.1%
Zone 6:	13,995	14,714	15,397	15,596	15,728	16,253	16.1%
Zone 7:	13,277	13,959	14,607	14,796	14,920	15,419	16.1%
Zone 8:	15,534	16,332	17,090	17,311	17,456	18,039	16.1%
TOTAL:	**121,744**	**128,000**	**133,938**	**135,672**	**136,814**	**141,380**	**16.1%**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Notes: Base year population derived from Experian Revised Population Estimates 2010. Projects from 2012 - 2031 informed by data provided Kent County Council.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS FOR COMPARISON GOODS (2010 prices)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	£2,205	£2,480	£2,891	£3,261	£3,363	£3,785	71.7%
Zone 2:	£2,427	£2,729	£3,182	£3,590	£3,702	£4,166	71.7%
Zone 3:	£2,871	£3,228	£3,764	£4,246	£4,378	£4,928	71.7%
Zone 4:	£2,592	£2,915	£3,399	£3,835	£3,954	£4,450	71.7%
Zone 5:	£2,682	£3,017	£3,517	£3,968	£4,091	£4,605	71.7%
Zone 6:	£2,832	£3,185	£3,713	£4,189	£4,319	£4,862	71.7%
Zone 7:	£2,728	£3,068	£3,577	£4,036	£4,161	£4,684	71.7%
Zone 8:	£3,124	£3,513	£4,096	£4,620	£4,764	£5,362	71.7%

Source: Average spend per capita estimates for 2012 are derived from Experian *'Retail Area Planner' Reports* .

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 9 (September 2011).* Expenditure on SFT has been deducted at the outset, based on research by Experian Business Strategies (Retail Planning Briefing Notes) and informed by the results of the HTIS.

TABLE 3: TOTAL FORECAST GROWTH IN COMPARISON GOODS EXPENDITURE, 2012 - 2031 (£ million)

ZONE:	2012	2017	2022	2026	2027	2031	2012 - 31
Zone 1:	£54.3	£64.2	£78.3	£89.4	£93.0	£108.2	99.4%
Zone 2:	£39.5	£46.7	£57.0	£65.1	£67.7	£78.8	99.4%
Zone 3:	£23.3	£27.6	£33.7	£38.5	£40.0	£46.5	99.4%
Zone 4:	£35.8	£42.3	£51.6	£59.0	£61.3	£71.3	99.4%
Zone 5:	£43.2	£51.1	£62.4	£71.3	£74.1	£86.2	99.4%
Zone 6:	£39.6	£46.9	£57.2	£65.3	£67.9	£79.0	99.4%
Zone 7:	£36.2	£42.8	£52.3	£59.7	£62.1	£72.2	99.4%
Zone 8:	£48.5	£57.4	£70.0	£80.0	£83.2	£96.7	99.4%
TOTAL:	**£320.5**	**£379.0**	**£462.3**	**£528.3**	**£549.4**	**£638.9**	**99.4%**

Source: Expenditure calcualted from Tables 1 & 2.

TABLE 4: EXISTING COMPARISON GOODS FLOORSPACE

	Estimated Sales Area (sqm net)
DOVER SUB REGIONAL CENTRE	27,286
DEAL DISTRICT CENTRE	12,396
SANDWICH RURAL SERVICE CENTRE	2,740
ALL OTHER IN FLOORSPACE IN DISTRICT	9
TOTAL IN DISTRICT:	**42,430**

Source: Floorspace estimates have been informed by the Goad Centre Reports for Dover, Deal and Sandwich, the 2003 Retail Study and our own research. Please note that these figures will include an element of existing vacant floorspace which is expected to return to comparison goods use within the plan period (2026).

Comparison Goods 2012 Capacity Assessment

TABLE 5: MARKET SHARE ANALYSIS (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	63.4%	55.7%	36.0%	21.8%	14.6%	11.4%	14.7%	15.1%	30.0%
DEAL DISTRICT CENTRE	0.6%	0.5%	17.3%	28.8%	41.4%	10.0%	0.7%	1.0%	11.7%
SANDWICH RURAL SERVICE CENTRE	0.0%	0.6%	0.4%	0.5%	0.1%	11.6%	0.8%	0.0%	1.7%
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.3%
LOCAL CENTRES	0.0%	0.4%	0.5%	0.1%	0.0%	3.1%	1.9%	0.3%	0.7%
VILLAGES AND HAMLETS	0.0%	0.1%	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%
INSIDE DISTRICT (RETENTION) SUBTOTAL	**64.1%**	**57.2%**	**54.9%**	**51.5%**	**56.2%**	**36.1%**	**20.7%**	**16.5%**	**44.5%**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	2.8%	2.2%	0.6%	0.8%	0.5%	0.4%	0.4%	4.2%	1.7%
Westwood Cross	2.8%	5.6%	7.2%	23.0%	22.3%	31.1%	11.3%	0.2%	12.4%
Canterbury	15.5%	24.3%	30.5%	17.8%	16.7%	23.8%	61.8%	34.4%	27.2%
Folkestone	12.7%	8.4%	4.3%	1.4%	0.8%	0.2%	0.8%	42.7%	10.4%
Greenhithe	0.0%	0.0%	0.7%	0.2%	0.2%	0.3%	0.5%	0.2%	0.2%
Margate	0.7%	0.4%	1.2%	1.3%	0.6%	1.8%	0.3%	0.0%	0.8%
Ramsgate	0.0%	0.0%	0.0%	1.2%	0.8%	2.8%	0.9%	0.1%	0.7%
Thanet	0.0%	0.0%	0.0%	0.0%	1.2%	1.3%	0.3%	0.0%	0.4%
All other shops and stores	1.3%	1.9%	0.7%	2.8%	0.7%	2.1%	3.0%	1.6%	1.8%
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**35.9%**	**42.8%**	**45.1%**	**48.5%**	**43.8%**	**63.9%**	**79.3%**	**83.5%**	**55.5%**
TOTAL:	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Results of NEMS Household Telephone Interview Survey (June 2012) commissioned by Strategic Perspectives. Dover and Deal shares include "in", "edge" and "out" of centre stores.

TABLE 6: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£34.4	£22.0	£8.4	£7.8	£6.3	£4.5	£5.3	£7.3	£96.1
DEAL DISTRICT CENTRE	£0.3	£0.2	£4.0	£10.3	£17.9	£3.9	£0.2	£0.5	£37.4
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.2	£0.1	£0.2	£0.1	£4.6	£0.3	£0.0	£5.4
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£1.0
LOCAL CENTRES	£0.0	£0.1	£0.1	£0.0	£0.0	£1.2	£0.7	£0.2	£2.4
VILLAGES AND HAMLETS	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£34.8**	**£22.6**	**£12.8**	**£18.4**	**£24.3**	**£14.3**	**£7.5**	**£8.0**	**£142.7**
OTHER CENTRES AND STORES OUTSIDE DISTRICT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ashford	£1.5	£0.9	£0.1	£0.3	£0.2	£0.2	£0.1	£2.1	£5.5
Westwood Cross	£1.5	£2.2	£1.7	£8.2	£9.7	£12.3	£4.1	£0.1	£39.8
Canterbury	£8.4	£9.6	£7.1	£6.4	£7.2	£9.4	£22.4	£16.7	£87.2
Folkestone	£6.9	£3.3	£1.0	£0.5	£0.4	£0.1	£0.3	£20.7	£33.2
Greenhithe	£0.0	£0.0	£0.2	£0.1	£0.1	£0.1	£0.2	£0.1	£0.7
Margate	£0.4	£0.1	£0.3	£0.5	£0.3	£0.7	£0.1	£0.0	£2.4
Ramsgate	£0.0	£0.0	£0.0	£0.4	£0.3	£1.1	£0.3	£0.0	£2.2
Thanet	£0.0	£0.0	£0.0	£0.0	£0.5	£0.5	£0.1	£0.0	£1.1
All other shops and stores	£0.7	£0.8	£0.2	£1.0	£0.3	£0.8	£1.1	£0.8	£5.7
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£19.5**	**£16.9**	**£10.5**	**£17.3**	**£19.0**	**£25.3**	**£28.7**	**£40.5**	**£177.8**
TOTAL:	**£54.3**	**£39.5**	**£23.3**	**£35.8**	**£43.2**	**£39.6**	**£36.2**	**£48.5**	**£320.5**

Source: Derived from Tables 3 & 5.

TABLE 7: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2017 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£40.7	£26.0	£9.9	£9.2	£7.5	£5.3	£6.3	£8.7	£113.6
DEAL DISTRICT CENTRE	£0.4	£0.2	£4.8	£12.2	£21.2	£4.7	£0.3	£0.6	£44.3
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.3	£0.1	£0.2	£0.1	£5.4	£0.3	£0.0	£6.4
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£1.1
LOCAL CENTRES	£0.0	£0.2	£0.1	£0.0	£0.0	£1.5	£0.8	£0.2	£2.8
VILLAGES AND HAMLETS	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.4
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£41.1**	**£26.7**	**£15.1**	**£21.8**	**£28.7**	**£16.9**	**£8.9**	**£9.5**	**£168.7**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	£1.8	£1.0	£0.2	£0.3	£0.3	£0.2	£0.2	£2.4	£6.5
Westwood Cross	£1.8	£2.6	£2.0	£9.7	£11.4	£14.6	£4.8	£0.1	£47.1
Canterbury	£10.0	£11.3	£8.4	£7.5	£8.5	£11.1	£26.5	£19.7	£103.1
Folkestone	£8.2	£3.9	£1.2	£0.6	£0.4	£0.1	£0.3	£24.5	£39.2
Greenhithe	£0.0	£0.0	£0.2	£0.1	£0.1	£0.2	£0.2	£0.1	£0.9
Margate	£0.5	£0.2	£0.3	£0.6	£0.3	£0.9	£0.1	£0.0	£2.9
Ramsgate	£0.0	£0.0	£0.0	£0.5	£0.4	£1.3	£0.4	£0.0	£2.6
Thanet	£0.0	£0.0	£0.0	£0.0	£0.6	£0.6	£0.1	£0.0	£1.4
All other shops and stores	£0.9	£0.9	£0.2	£1.2	£0.4	£1.0	£1.3	£0.9	£6.7
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£23.1**	**£20.0**	**£12.4**	**£20.5**	**£22.4**	**£30.0**	**£34.0**	**£47.9**	**£210.2**
TOTAL:	**£64.2**	**£46.7**	**£27.6**	**£42.3**	**£51.1**	**£46.9**	**£42.8**	**£57.4**	**£379.0**

Source: Derived from Tables 3 & 5.

Comparison Goods 2012 Capacity Assessment

TABLE 8: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2022 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£49.7	£31.8	£12.1	£11.2	£9.1	£6.5	£7.7	£10.6	£138.6
DEAL DISTRICT CENTRE	£0.5	£0.3	£5.8	£14.8	£25.8	£5.7	£0.3	£0.7	£54.0
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.3	£0.1	£0.2	£0.1	£6.6	£0.4	£0.0	£7.9
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£1.4
LOCAL CENTRES	£0.0	£0.2	£0.2	£0.1	£0.0	£1.8	£1.0	£0.2	£3.4
VILLAGES AND HAMLETS	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.5
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£50.1**	**£32.6**	**£18.5**	**£26.6**	**£35.0**	**£20.6**	**£10.8**	**£11.5**	**£205.8**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	£2.2	£1.3	£0.2	£0.4	£0.3	£0.2	£0.2	£3.0	£7.9
Westwood Cross	£2.2	£3.2	£2.4	£11.8	£13.9	£17.8	£5.9	£0.2	£57.4
Canterbury	£12.1	£13.8	£10.3	£9.2	£10.4	£13.6	£32.3	£24.1	£125.8
Folkestone	£10.0	£4.8	£1.4	£0.7	£0.5	£0.1	£0.4	£29.9	£47.9
Greenhithe	£0.0	£0.0	£0.2	£0.1	£0.1	£0.2	£0.3	£0.2	£1.0
Margate	£0.6	£0.2	£0.4	£0.7	£0.4	£1.0	£0.2	£0.0	£3.5
Ramsgate	£0.0	£0.0	£0.0	£0.6	£0.5	£1.6	£0.5	£0.1	£3.2
Thanet	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7	£0.2	£0.0	£1.7
All other shops and stores	£1.1	£1.1	£0.2	£1.5	£0.5	£1.2	£1.6	£1.1	£8.2
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£28.1**	**£24.4**	**£15.2**	**£25.0**	**£27.3**	**£36.6**	**£41.4**	**£58.5**	**£256.5**
TOTAL:	**£78.3**	**£57.0**	**£33.7**	**£51.6**	**£62.4**	**£57.2**	**£52.3**	**£70.0**	**£462.3**

Source: Derived from Tables 3 & 5.

TABLE 9: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2026 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£56.7	£36.3	£13.8	£12.8	£10.4	£7.4	£8.8	£12.1	£158.4
DEAL DISTRICT CENTRE	£0.5	£0.3	£6.7	£17.0	£29.5	£6.5	£0.4	£0.8	£61.7
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.4	£0.2	£0.3	£0.1	£7.6	£0.5	£0.0	£9.0
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£1.6
LOCAL CENTRES	£0.0	£0.2	£0.2	£0.1	£0.0	£2.0	£1.1	£0.3	£3.9
VILLAGES AND HAMLETS	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.6
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£57.3**	**£37.3**	**£21.1**	**£30.4**	**£40.0**	**£23.6**	**£12.4**	**£13.2**	**£235.2**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	£2.5	£1.5	£0.2	£0.5	£0.4	£0.3	£0.2	£3.4	£9.0
Westwood Cross	£2.5	£3.7	£2.8	£13.5	£15.9	£20.3	£6.7	£0.2	£65.6
Canterbury	£13.9	£15.8	£11.7	£10.5	£11.9	£15.5	£36.9	£27.5	£143.7
Folkestone	£11.4	£5.5	£1.6	£0.8	£0.6	£0.2	£0.5	£34.2	£54.7
Greenhithe	£0.0	£0.0	£0.3	£0.1	£0.1	£0.2	£0.3	£0.2	£1.2
Margate	£0.7	£0.2	£0.5	£0.8	£0.4	£1.2	£0.2	£0.0	£4.0
Ramsgate	£0.0	£0.0	£0.0	£0.7	£0.6	£1.8	£0.5	£0.1	£3.7
Thanet	£0.0	£0.0	£0.0	£0.0	£0.9	£0.8	£0.2	£0.0	£1.9
All other shops and stores	£1.2	£1.2	£0.3	£1.7	£0.5	£1.4	£1.8	£1.3	£9.3
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£32.2**	**£27.9**	**£17.3**	**£28.6**	**£31.2**	**£41.8**	**£47.3**	**£66.8**	**£293.1**
TOTAL:	**£89.4**	**£65.1**	**£38.5**	**£59.0**	**£71.3**	**£65.3**	**£59.7**	**£80.0**	**£528.3**

Source: Derived from Tables 3 & 5.

TABLE 10: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2027 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£59.0	£37.8	£14.4	£13.3	£10.8	£7.7	£9.1	£12.5	£164.7
DEAL DISTRICT CENTRE	£0.6	£0.3	£6.9	£17.6	£30.7	£6.8	£0.4	£0.9	£64.2
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.4	£0.2	£0.3	£0.1	£7.9	£0.5	£0.0	£9.3
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£1.7
LOCAL CENTRES	£0.0	£0.2	£0.2	£0.1	£0.0	£2.1	£1.2	£0.3	£4.1
VILLAGES AND HAMLETS	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.6
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£59.6**	**£38.8**	**£22.0**	**£31.6**	**£41.6**	**£24.5**	**£12.9**	**£13.7**	**£244.6**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	£2.6	£1.5	£0.2	£0.5	£0.4	£0.3	£0.3	£3.5	£9.4
Westwood Cross	£2.6	£3.8	£2.9	£14.1	£16.5	£21.1	£7.0	£0.2	£68.2
Canterbury	£14.4	£16.4	£12.2	£10.9	£12.4	£16.2	£38.4	£28.6	£149.4
Folkestone	£11.8	£5.7	£1.7	£0.9	£0.6	£0.2	£0.5	£35.5	£56.9
Greenhithe	£0.0	£0.0	£0.3	£0.1	£0.1	£0.2	£0.3	£0.2	£1.2
Margate	£0.7	£0.3	£0.5	£0.8	£0.5	£1.2	£0.2	£0.0	£4.2
Ramsgate	£0.0	£0.0	£0.0	£0.7	£0.6	£1.9	£0.6	£0.1	£3.8
Thanet	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.2	£0.0	£2.0
All other shops and stores	£1.3	£1.3	£0.3	£1.7	£0.5	£1.4	£1.8	£1.4	£9.7
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£33.4**	**£29.0**	**£18.0**	**£29.7**	**£32.5**	**£43.4**	**£49.2**	**£69.5**	**£304.8**
TOTAL:	**£93.0**	**£67.7**	**£40.0**	**£61.3**	**£74.1**	**£67.9**	**£62.1**	**£83.2**	**£549.4**

Source: Derived from Tables 3 & 5.

Comparison Goods 2012 Capacity Assessment

TABLE 11: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2031 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL FROM STUDY AREA
DOVER SUB REGIONAL CENTRE	£68.6	£43.9	£16.7	£15.5	£12.6	£9.0	£10.6	£14.6	£191.6
DEAL DISTRICT CENTRE	£0.7	£0.4	£8.1	£20.5	£35.7	£7.9	£0.5	£1.0	£74.7
SANDWICH RURAL SERVICE CENTRE	£0.0	£0.5	£0.2	£0.3	£0.1	£9.2	£0.6	£0.0	£10.9
AYLSHAM (PROPOSED) RURAL SERVICE CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£1.9
LOCAL CENTRES	£0.0	£0.3	£0.2	£0.1	£0.0	£2.5	£1.4	£0.3	£4.8
VILLAGES AND HAMLETS	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.7
INSIDE DISTRICT (RETENTION) SUBTOTAL	**£69.3**	**£45.1**	**£25.5**	**£36.7**	**£48.4**	**£28.5**	**£15.0**	**£15.9**	**£284.5**
OTHER CENTRES AND STORES OUTSIDE DISTRICT									
Ashford	£3.1	£1.8	£0.3	£0.6	£0.4	£0.3	£0.3	£4.1	£10.9
Westwood Cross	£3.0	£4.4	£3.3	£16.4	£19.2	£24.6	£8.1	£0.2	£79.3
Canterbury	£16.8	£19.1	£14.2	£12.7	£14.4	£18.8	£44.6	£33.3	£173.8
Folkestone	£13.8	£6.6	£2.0	£1.0	£0.7	£0.2	£0.6	£41.3	£66.1
Greenhithe	£0.0	£0.0	£0.3	£0.1	£0.1	£0.3	£0.4	£0.2	£1.4
Margate	£0.8	£0.3	£0.6	£1.0	£0.5	£1.4	£0.2	£0.0	£4.8
Ramsgate	£0.0	£0.0	£0.0	£0.8	£0.7	£2.2	£0.6	£0.1	£4.5
Thanet	£0.0	£0.0	£0.0	£0.0	£1.0	£1.0	£0.2	£0.0	£2.3
All other shops and stores	£1.5	£1.5	£0.3	£2.0	£0.6	£1.7	£2.1	£1.6	£11.3
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	**£38.9**	**£33.7**	**£21.0**	**£34.6**	**£37.8**	**£50.5**	**£57.2**	**£80.8**	**£354.5**
TOTAL:	**£108.2**	**£78.8**	**£46.5**	**£71.3**	**£86.2**	**£79.0**	**£72.2**	**£96.7**	**£638.9**

Source: Derived from Tables 3 & 5.

TABLE 12: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1-8) (%)

	2012	2017	2022	2026	2027	2031
DOVER	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
DEAL AND SANDWICH	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
ALL OTHER	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%

Source: SP Estimate informed by previous the Economic Impact of Tourism on Kent and Medway (December 2010).

TABLE 13: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN DISTRICT

	2012	2017	2022	2026	2027	2031
DOVER	£110.5	£130.7	£159.4	£182.1	£189.4	£220.3
DEAL AND SANDWICH	£45.0	£53.3	£65.0	£74.2	£77.2	£89.8
ALL OTHER	£3.8	£4.5	£5.5	£6.3	£6.5	£7.6
DISTRICT AREA TOTAL:	**£159.3**	**£188.4**	**£229.9**	**£262.7**	**£273.1**	**£317.7**

Source: Tables 6 - 12.

TABLE 14: COMPARISON GOODS CAPACITY ASSESSMENT - BASELINE

		2012	2017	2022	2026	2027	2031
STEP 1:	**TOTAL EXISTING FLOORSPACE IN DISTRICT (sqm net):**	42,430	42,430	42,430	42,430	42,430	42,430
STEP 2:	**TOTAL FORECAST 'POTENTIAL' TURNOVER OF FLOORSPACE IN DISTRICT (£ m):**						
	(i) Total 'Potential' Turnover (£ million):	£159.3	£188.4	£229.9	£262.7	£273.1	£317.7
	(ii) Average Sales Density (£ per sq.m):	£3,755	£4,440	£5,417	£6,190	£6,437	£7,487
STEP 3:	**TOTAL FORECAST 'BENCHMARK' TURNOVER OF FLOORSPACE IN DISTRICT (£ m):**						
	(i) Total 'Benchmark' Turnover (£ million):	£159.3	£172.2	£185.5	£196.9	£199.8	£215.3
	(ii) Average Sales Density (£ per sq.m):	£3,755	£4,058	£4,371	£4,640	£4,709	£5,073
STEP 4:	**NET RESIDUAL EXPENDITURE (£m) NOT INCLUDING COMMITMENTS**	**£0.0**	**£16.2**	**£44.4**	**£65.8**	**£73.3**	**£102.4**

Notes: Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as follows:

2011	2012	2013	2014-18	2019-31
0.25%	0.8%	1.0%	1.5%	1.5%

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Comparison Goods 2012 Capacity Assessment

TABLE 15: TOTAL ESTIMATED EXPENDITURE ARISING FROM PLANNED HOUSING GROWTH

		2012	2017	2022	2026	2027	2031
Assumptions							
Average persons per dwelling	2.3						
Average spend per person (£/ person)		£2,683	£3,017	£3,518	£3,968	£4,092	£4,605
Average retention rate within District across survey zones	44.5%						
Core Strategy Housing Targets (CP 3)							
Dover		690	2,372	4,620	5,900	6,536	9,080
Deal & Sandwich		378	858	1,458	1,650	1,650	1,650
Aylesham		144	550	994	1,170	1,170	1,170
All other		90	402	674	770	770	770
Subtotal		1,302	4,182	7,746	9,490	10,126	12,670
Total additional people:							
Dover		1,587	5,456	10,626	13,570	15,033	20,884
Deal & Sandwich		869	1,973	3,353	3,795	3,795	3,795
Aylesham		331	1,265	2,286	2,691	2,691	2,691
All other		207	925	1,550	1,771	1,771	1,771
Subtotal		2,995	9,619	17,816	21,827	23,290	29,141
Total eximated additional expenditure from planned housing growth							
Dover		£1.9	£7.3	£16.6	£24.0	£27.4	£42.8
Deal & Sandwich		£1.0	£2.7	£5.3	£6.7	£6.9	£7.8
Aylesham		£0.4	£1.7	£3.6	£4.8	£4.9	£5.5
All other		£0.2	£1.2	£2.4	£3.1	£3.2	£3.6
TOTAL		**£3.6**	**£12.9**	**£27.9**	**£38.6**	**£42.4**	**£59.7**

Source: Planned housing growth up to 2026 and 2031 taken from Policy CP3 of Dover District Council Adopted Core Strategy. Please note that these figures take into account esimates of completions up to 2011. Average persons per household (in 2010) derived from data proivded by Kent County Council. Average expenditure per capita taken as average of all zones. Average retention rate within District taken from Table 5.

TABLE 16: COMMITTED RETAIL DEVELOPMENTS & STRATEGIC ALLOCATIONS

	Estimated Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2012	2017	2022	2026	2027	2031
Commitments								
White Cliffs Business Park, Dover	3,901	£4,000	£15.6	£16.4	£17.2	£18.1	£18.3	£19.1
St James Development, Dover	7,477	£4,000	£30.0	£31.5	£33.1	£34.7	£35.1	£36.5
Strategic Allocations								
Dover Mid-Town	6,672	£4,000	£26.8	£28.1	£29.5	£31.0	£31.3	£32.6
Dover Waterfront	10,500	£4,000	£42.1	£44.2	£46.4	£48.8	£49.3	£51.3
Whitfield Urban Extension	668	£4,000	£2.7	£2.8	£3.0	£3.1	£3.1	£3.3
			£117.2	**£122.9**	**£129.2**	**£135.8**	**£137.1**	**£142.7**

Source: Commitments taken from planning permissions DOV/07/00802 (White Cliffs Business Park) and DOV/11/01056 (St. James Redevelopment). Please note scale and mix of floorspace envisioned for strategic allocations are working assumptions that will be subject to refinement through the progression of the Land Allocations Document and Dover Masterplan. Estimates are based on the Dover Mid-Town Feasibility Study, the Retail Assessment for Phase 1a of the planned expansion of Whitfield produced by Barton Wilmore in November 2010, and advice from the Council.

Notes: Average sales density taken as SP estimate. Average sales density for comparison goods grown to each assessment year assuming an annual productivity growth rate of 0.3% per annum in 2011, 0.8% pa in 2012, 1.0% pa in 2013 and 1.5% pa between 2014-2031. Average sales density estimates make an allowance for VAT.

TABLE 17: SHARE OF NET RESIDUAL EXPENDITURE AVAILABLE

	2012 Market Share (%)
DOVER TRADE AREA	67%
DEAL/SANDWICH AREA	30%
OTHER	3%

Source: Estimated share of projected capacity based on 2012 market shares.

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Comparison Goods 2012 Capacity Assessment

TABLE 18a: FLOORSPACE REQUIREMENTS FOR DOVER TRADE AREA UP TO 2031

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£0.0	£16.2	£44.4	£65.8	£73.3	£102.4
Additional expenditure from planned housing	£3.6	£12.9	£27.9	£38.6	£42.4	£59.7
DOVER TRADE AREA						
Net residual expenditure (not including commitments)	£0.0	£10.93	£29.9	£44.3	£49.4	£69.0
Additional expenditure from planned housing	£1.9	£7.3	£16.6	£24.0	£27.4	£42.8
Commitments	£45.6	£47.9	£50.3	£52.9	£53.4	£55.6
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE	**-£43.7**	**-£29.6**	**-£3.8**	**£15.4**	**£23.4**	**£56.2**
FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m)	£4,000	£4,288	£4,619	£4,903	£4,976	£5,282
(ii) Net Floorspace Capacity (sq m):	-10,933	-6,904	-818	3,143	4,693	10,643
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-15,619	-9,863	-1,168	4,490	6,704	15,204

Notes: Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as per Table 14.

TABLE 18b: FLOORSPACE REQUIREMENTS FOR DOVER TRADE AREA UP TO 2031 (INCLUDING STRATEGIC ALLOCATIONS)

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£0.0	£16.2	£44.4	£65.8	£73.3	£102.4
Additional expenditure from planned housing	£3.6	£12.9	£27.9	£38.6	£42.4	£59.7
DOVER TRADE AREA						
Net residual expenditure (not including commitments)	£0.0	£10.93	£29.9	£44.3	£49.4	£69.0
Additional expenditure from planned housing	£1.9	£7.3	£16.6	£24.0	£27.4	£42.8
Commitments and Strategic Allocations	£117.2	£122.9	£129.2	£135.8	£137.1	£142.7
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE	**-£115.3**	**-£104.6**	**-£82.6**	**-£67.5**	**-£60.4**	**-£30.9**
FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m)	£4,000	£4,288	£4,619	£4,903	£4,976	£5,282
(ii) Net Floorspace Capacity (sq m):	-28,818	-24,403	-17,891	-13,763	-12,130	-5,851
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-41,168	-34,862	-25,558	-19,662	-17,329	-8,359

Notes: Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as per Table 14.

TABLE 19: FLOORSPACE REQUIREMENTS FOR DEAL AND SANDWICH UP TO 2031

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£0.0	£16.2	£44.4	£65.8	£73.3	£102.4
Additional expenditure from planned housing	£3.6	£12.9	£27.9	£38.6	£42.4	£59.7
DEAL AND SANDWICH TRADE AREA						
Net residual expenditure (not including commitments)	£0.0	£4.9	£13.3	£19.8	£22.0	£30.8
Additional expenditure from planned housing	£1.0	£2.7	£5.3	£6.7	£6.9	£7.8
Commitments & Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE	**£1.0**	**£7.5**	**£18.6**	**£26.5**	**£28.9**	**£38.6**
FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m)	£4,000	£4,288	£4,619	£4,903	£4,976	£5,282
(ii) Net Floorspace Capacity (sq m):	260	1,756	4,025	5,401	5,817	7,301
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	371	2,509	5,750	7,716	8,310	10,430

Notes: Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as per Table 14.

TABLE 20: FLOORSPACE REQUIREMENTS FOR ALL OTHER IN DISTRICT UP TO 2031

	2012	2017	2022	2026	2027	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	£0.0	£16.2	£44.4	£65.8	£73.3	£102.4
Additional expenditure from planned housing	£3.6	£12.9	£27.9	£38.6	£42.4	£59.7
ALL OTHER IN DISTRICT						
Net residual expenditure (not including commitments)	£0.0	£0.4	£1.2	£1.71	£1.9	£2.7
Additional expenditure from planned housing	£0.2	£1.2	£2.4	£3.1	£3.2	£3.6
Commitments & Strategic Allocations	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
TOTAL RESIDUAL EXPENDITURE CAPACITY FOR FLOORSPACE	**£0.2**	**£1.7**	**£3.6**	**£4.8**	**£5.1**	**£6.3**
FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m)	£4,000	£4,288	£4,619	£4,903	£4,976	£5,282
(ii) Net Floorspace Capacity (sq m):	62	388	775	987	1,031	1,191
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	88	554	1,108	1,410	1,473	1,702

Notes: Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as per Table 14.