Swale Borough Council

Retail and Leisure Needs Assessment

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Volume 1 of 2 – Main Report

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Swale BOROUGH COUNCIL

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1.0 Introduction

1.1 Instruction

1.1.1 WYG Planning ('WYG') was commissioned by Swale Borough Council (SBC) in August 2018 to undertake a Retail and Leisure Needs Assessment for the Council area. The key purpose of this study is to act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail and leisure development. The Study supersedes the previous 2010 Retail and Town Centre Study completed on behalf of the Council.

1.1.2 This Study will be used to inform the emerging Local Plan for the authority. The Council is currently embarking upon the production of a Local Plan review covering the period 2022-2038. The new Local Plan is expected to be adopted during 2022/23 and will identify how land is used, determining what will be built where. Initial consultation on the plan was undertaken between April and June 2018, Issues and Options consultation is proposed to take place in autumn 2019.

1.1.3 The study explores retail and commercial leisure need over the plan period to 2038 and provides an up to date review of the performance of the town centres in the Borough. The aims and objectives for the Study include the following:

- Update the quantitative numbers to establish retail shopping patterns and identify if there are quantitative retail and leisure needs;
- Undertake health check assessments of the three town centres (Sittingbourne, Sheerness and Faversham) providing appropriate recommendations on issues affecting the health of the centres;
- Undertake health check assessments of the 11 identified local centres and provide appropriate recommendations as relevant on issues affecting the health of the centres;
- Provide recommendations on the town centre boundaries and extent of the primary and secondary shopping frontages presently identified;
- A review of the relevant evidence and provide recommendations regarding retail impact assessment threshold/s;
- Advise of any qualitative needs for the identified town centres arising from the health check assessments.

1.1.4 Key contributions to the above objectives have been a number of items of new empirical research. First, we have commissioned NEMS Market Research to undertake a new a shopping survey of 600 households. The Study Area for the survey comprises 6 zones which follows the previous zones utilised in the 2010 study and are based on postcode areas.

1.1.5 The second area of empirical research has been in relation to the assessment of the health of the 3 town centres and the 11 local centres within the Borough. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.

1.1.6 The Study is also informed by industry research having regard to published recognised retail and leisure data including demand/requirements from retail and leisure operators for presence in the defined town centres.

1.1.7 Finally, in accordance with the duty to cooperate, WYG has also worked with the Council to contact neighbouring local planning authorities in order to identify existing retail and commercial leisure commitments and proposals within competing centres which could have the effect of enhancing their retail and commercial leisure offer. The Councils we have contacted are:

- Canterbury City Council;
- Maidstone Borough Council;
- Ashford Borough Council;
- Medway Council; and
- Dartford Borough Council.

1.2 Structure of Study

1.2.1 Our study is structured as follows:

- Section 2 outlines the current national and local planning policy context for retail and leisure development issues in the Borough;
- Section 3 provides a context for the Study by outlining the current and emerging key retail and leisure trends in the UK;
- Section 4 sets out the key market research which informs the Study;
- Section 5 analyses retail market shares and patterns in the Study Area;
- Section 6 sets out our qualitative assessment/overview of the vitality and viability of Sittingbourne Town Centre;
- Section 7 sets out our qualitative assessment/overview of the vitality and viability of Faversham Town Centre;
- Section 8 sets out our qualitative assessment/overview of the vitality and viability of Sheerness Town Centre;

- Section 9 sets out our qualitative assessment/overview of the vitality and viability of Local Centres;
- Section 10 provides our assessment of the need for further convenience and comparison goods floorspace over the assessment period;
- Section 11 sets out our assessment of the need for further leisure floorspace over the assessment period; and
- Section 12 summarises our key findings and sets out our recommendations.

2.0 Planning Policy Context

2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Council's new Local Plan, it is important to review existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise Swale Borough Council's adopted planning policies, insofar as they are relevant to retail, commercial leisure and town centre matters.

2.2 National Planning Policy Framework (NPPF)

2.2.1 The revised National Planning Policy Framework (NPPF) was published in July 2018. The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.

2.2.2 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. The economic objective seeks to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places at the right time to support growth. In terms of plan-making, it is stated that the planning system should be genuinely plan led and local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

2.2.3 In terms of economic development, section 6 of the NPPF identifies that planning policies should create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity. Planning policies and decisions should recognise and address specific locational requirements of different sectors.

2.2.4 The NPPF stresses planning policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth and be flexible enough to accommodate needs not anticipated in the plan and to enable a rapid response to changes in economic circumstances.

2.2.5 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption. Paragraph 85 of the NPPF indicates that planning policies should:

- define a network and hierarchy of centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least 10 years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- 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 often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2.6 Paragraph 86 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 88 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale rural development.

2.2.7 Paragraph 89 indicates that local planning authorities should require an impact assessment for retail and leisure development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500sq m.

2.2.8 Paragraph 90 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.

2.2.9 The NPPF also recognises that retail and leisure activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

2.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

2.3.1 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places for people to want to live, visit and work.

2.3.2 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

2.3.3 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses to enhance overall vitality and viability;
- the evaluation of the town centre to assess whether it can accommodate the scale of assessed need, and if it cannot, evaluating different policy options to help accommodate the need;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of how car parking provision be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality.

2.3.4 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

2.3.5 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

2.3.6 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

2.3.7 The Ministry for Housing, Communities and Local Government (MHCLG) has confirmed to WYG that the planning practice guidance pertaining to town centre use planning policy will be updated to take account of the revised NPPF in due course, with no firm timescales at present.

2.4 Local Planning Policy Context and Other Council Strategies

2.4.1 The relevant development plan for the Council area consists of the following:

- The Swale Local Plan (Bearing Fruits 2031) – adopted July 2017
- Faversham Creek Neighbourhood Plan 2016-31 – adopted June 2017

Swale Borough Local Plan: Bearing Fruits 2031

Policy ST3: Swale Settlement Strategy

2.4.2 Policy ST3 identifies that development proposals on previously developed land within defined built up area boundaries and on allocated sites will be permitted in accordance with the settlement hierarchy. Sittingbourne is identified as the main urban centre in the Borough which will provide the primary urban focus for growth and development will support the town centre regeneration and underpin the town's role as the principal centre.

2.4.3 The other urban centres of Faversham and Sheerness will provide the secondary urban focus for growth at a scale and form compatible to their historic and natural assets and where it supports their role as local centres serving their hinterland.

2.4.4 Other urban local centres of Minster, Halfway, Queensborough and Rushenden are identified to be the focus of developments seeking to meet their own and wider needs. Rural Local Service Centres (Boughton, Eastchurch, Iwade, Leysdown, Newington, Teynham) will provide the tertiary focus for growth in the Borough and the primary focus for the rural area.

Policy ST5: Sittingbourne Area Strategy

2.4.5 Policy ST5 confirms the town is the principal urban centre and focus for main concentration of developments in and adjacent to the town. The policy supports development which: increases the supply of employment provision; ensures vitality of Sittingbourne Town Centre; improves connections to A249 and M2; and provides new housing alongside compliance with other policy objectives.

Policy ST6: Isle of Sheppey Area Strategy

2.4.6 Policy ST6 identifies that settlements within the West Sheppey Triangle are the focus of development and long-term change. Proposals will be expected to bring forward economic development, support the existing tourism offer, consolidate and enhance the retail service role of Sheerness Town Centre and bring forward comprehensive regeneration of the Trinity Road area, Queenborough/Rushden alongside other specific objectives.

Policy ST7: The Faversham Area and Kent Downs Strategy

2.4.7 Policy ST5 identifies that the conservation and enhancement of the historic and natural environment is the primary planning aim alongside strengthening the viability of Faversham and it's rural communities supporting their shared social, economic and cultural links.

Policy CP1: Building a strong, competitive economy

2.4.8 Development proposals are expected to stabilise job/floorspace losses, bring forward homegrown business creation, secure additional non-food retail/leisure growth, encourage educational facilities and vocational learning and contribute to the delivery of a comprehensive land portfolio for economic development.

Policy Regen 1: Central Sittingbourne Regeneration Area

2.4.9 Policy Regen 1 identifies a regeneration area for Sittingbourne where proposals which support the objective of consolidating and expanding Sittingbourne's position as the main retail, business, cultural, community and civic centre for the Borough will be permitted. The policy specifically refers to providing additional comparison goods retail space, a cinema, performance venue and a redeveloped and enhanced civic quarter.

2.4.10 The site is currently undergoing redevelopment by The Spirit of Sittingbourne. The mixed-use scheme, aiming for completion by early 2020, will deliver a new 8-screen multi-plex screen cinema, six new restaurant units, a 63 bed hotel, 213 residential apartments and a multi-storey car park.

Policy Regen 2: Queenborough and Rushden Regeneration Area

2.4.11 Within this area the Council will support proposal with the objective of regenerating the area for residential, employment and community uses. One of the identified objectives includes providing at Neatscourt, commercial floorspace unless this would adversely impact upon the vitality of Sheerness Town Centre.

Policy DM1: Maintaining and enhancing the vitality and viability of town centres and other areas

2.4.12 Within the defined primary shopping frontages, the Council will permit non-retail uses where they maintain or enhance the primary retail function of the area by adding to the mix of uses to help maintain or increase its overall vitality and viability, do not result in a significant loss of retail floorspace or break up a continuous retail frontage, do not lead to a concentration of non-retail frontage and do no result in the loss of erosion of a non-retail use that underpins the role, functioning and vitality and viability of the area.

2.4.13 Within the defined secondary shopping frontages, or within a local centre, non-retail uses will be permitted providing they will not lead to a significant concentration of non-retail floorspace or housing or the loss of significant retail frontage, result in the loss of existing residential accommodation of a use important to the community and lead to loss of residential amenity.

2.4.14 Outside of the primary and secondary shopping frontages or local centres, non-retail use will be permitted if it maintains the area's role, functioning, vitality and viability.

Policy DM2: Proposals for main town centre uses

2.4.15 The policy identifies the retail hierarchy for the Borough as follows:

- Town Centres – Sittingbourne (principal town), Faversham and Sheerness;
- Local Centres – Queenborough, Rushden, Halfway, Minster, Milton Regis, Boughton, Eastchurch, Iwade, Leysdown, Newington and Teynham.

2.4.16 Planning permission will be granted for main town centre uses taking account of the scale and type of development in relation to the size, role and function of the centre and where they are located within a defined town centre. Where it is demonstrated a town centre site is not available it should be located on a site on the edge of a town centre and should demonstrate through an impact assessment it would not individually or cumulatively undermine the vitality and viability of existing town centres, or of other local centres and the facilities and services of other locations.

2.4.17 The supporting text to the policy identifies that the floorspace threshold for impact assessments is that set out in a national planning policy (2,500sq m gross).

Policy DM3: Rural Economy

2.4.18 Planning permission will be granted for sustainable growth and expansion of business and enterprise in the rural area. For tourism/leisure, the policy states development proposals will be green/sustainable tourism and provide for an expansion of tourist and visitor facilities in appropriate locations where identified needs are not being met by existing facilities.

Faversham Creek Neighbourhood Development Plan

Community Leisure and Recreation Policies

2.4.19 Policy CLR1 requires new development on any waterfront site to provide public right of access to the waterfront for leisure and educational activities. Policy CLR2 requires applications for waterfront sites to include an appraisal of options for the provision of public spaces and leisure amenities.

Business, Tourism and Employment Policies

2.4.20 Policy BTE1 requires new development to enhance the Creekside area as a visitor attraction and attractive location for new businesses. Whilst policy BTE2 states new business activities in the plan area which contribute to the strength and diversity of Faversham's wider tourism and employment offer and do not undermine the town centre economy will be supported.

Site Specific Policies

2.4.21 The plan also identifies a number of sites for redevelopment, those including retail/commercial leisure are summarised:

- <u>Site 05 Swan Quay</u> – Policy SWQ1 states site to be used for mix of offices and workshops, retail, maritime general industrial and for a gallery.
- <u>Site 07 Former Coach Depot</u> – Policy CD1 identifies the ground floors could include a mix of Class B1 (offices and workshops), class A1 (retail) and facilities for boat users. Upper floors to be residential or holiday let use.
- <u>Site 08 Standard Quay</u> – Policy STQ2 seeks to establish a cluster of land uses that make this part of the Creek a visitor destination for maritime relates works, leisure, retail and food and drink uses.

2.5 Budget 2018 – The Government's Plans to 'Transform Town Centres'

2.5.1 In the 2018 Budget the Ministry of Housing, Communities and Local Government (MHCLG) announced a consultation on new planning reforms with various initiatives suggested that would allow for a more flexible and supportive approach to help transform/revitalise town centres. The suggested initiatives included changes to permitted development rights, business rate reliefs for small town centre businesses, and funding to help Council in drawing up and implementing plans for town centres to adapt/respond to changes in the retail climate.

Changes in Permitted Development Rights and Use Classes

2.5.2 In October 2018 MHCLG issued a consultation document titled 'Planning Reform: Supporting the high street and increasing the delivery of new homes'. The consultation period is until the middle of January 2019. To support greater diversity and footfall on the high street, and subject to prior approval, Part 1 proposes:

- changes to permitted development rights (PDR) to allow shops (Use Class A1), financial and professional services (A2), hot food takeaways (A5), betting shops, pay day loan shops and launderettes to change to office use (B1);
- changes to PDR to allow hot food takeaways (A5) to change to residential use (C3);
- extending the current temporary change of use PDR for shops (A1) financial and professional services (A2), restaurants and cafes (A3), hot food takeaways (A5), offices (B1), non-residential institutions (D1), assembly and leisure uses (D2), betting shops and pay day loan shops to change to A1, A2, A3 or B1, to also allow changes to a public library, exhibition hall, museum, clinic or health centre. The period of the temporary use would also be extended from 2 to 3 years;
- changing the A Class in the Use Classes Order, either to:
  - (a) remove the current named uses and replace them with 'a broader definition of uses for the sale, display or service to visiting members of the public'; or
  - (b) create a new use class for a mix of uses within A1, A2 and A3 uses 'beyond that which is considered to be ancillary', to replace the existing A1, A2 and A3 and create a single use class to cover shops, financial and professional services, restaurants and cafes;
- creating a new PDR that would be subject to prior approval (covering design, siting, appearance, impact on amenity, flooding and contamination risks, transport and highways), to allow additional storeys to be built above buildings in commercial, residential (C3) and some other uses (such as out-of-centre retail and leisure parks, or health centres).

Business Rate Relief

2.5.3 In his Budget the Chancellor confirmed the government will cut business rates by a third for small town centre retailers/businesses with a rateable value of less than £50,000. The government's funding for business rates relief totals £900 million. The Chancellor indicated the business rate reliefs would introduce an average annual saving of £8,000 for 90% of independent businesses.

2.5.4 Whilst the cut to business rates for small businesses has been welcomed, there has been disappointed that the fund doesn't help medium and large high street businesses which have been hardest hit by rate rises.

2.5.5 At the same time as announcing business rate reliefs the government also announced the introduction of a digital services tax from April 2020. The digital services tax is a levy against social media platforms, internet marketplaces and search engines. It is intended to be targeted at "established tech giants" rather than start-ups. The government is proposing a 2% tax rate against the sales that large digital companies make in the UK. It would be imposed on companies that are profitable and generate "at least £500m a year in global revenue".

Future High Street Fund

2.5.6 As part of the 2018 Budget, a new £675 million Future High Streets Fund was announced that is intended to assist local areas to respond/adapt to changes in their town centres, by using long term strategies. There will be a competition for the funding with local areas expected to partner with the private sector in their proposals, which should set out an overall vision of the specific improvements that would contribute to its achievement. It is envisaged that the Fund will then co-fund projects such as:

- Investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/ city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities', and the regeneration of heritage high streets; and
- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.'

2.5.7 A new High Streets Taskforce will also be created and funded, to support local leadership. The fund will also support the regeneration of heritage high streets (up to £55 million of the overall fund). This has two elements: helping to restore historic properties through Historic England; and (2) providing communities with resources to put historic buildings back into economic use.

2.5.8 The timescales for the Future High Streets Fund set out by MHCLG are as follows:

- Later in 2018: launch of the full prospectus.
- Early 2019: launch of the High Streets Taskforce.
- Spring 2019: Stage 1 Expressions of Interest, with local authorities developing private sector partnerships to deliver capital projects.
- Summer 2019: gateway assessment, with bids to be taken to Stage 2 (and local areas working up more detailed business cases).

2.6 Summary

2.6.1 This section of the study has reviewed existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study.

2.6.2 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The Council's development plan follows the general trend of the most recent national policy guidance, identifying a hierarchy of centres and town centre first approach.

2.6.3 As required by this commission, policy recommendations on the basis of updates to the evidence base and national guidance is provided in Section 12.

3.0 Current & Emerging Retail & Leisure Trends

3.1 Introduction

3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in the Borough, we provide an overview of prevailing retail and commercial leisure trends below. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

3.2 Changing Retail Climate

3.2.1 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years.

3.2.2 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger town/city centres (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores.

3.2.3 Those retailers who have development programmes are focusing on the provision of stores in strategic locations. They are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. New and emerging retailers have frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres. Indeed, many town centre schemes have been put on hold or scaled down in size, and with expenditure growth forecast being relatively low in the medium term, retailers are likely to remain cautious about store development.

3.2.4 PwC reported (November 2018) that in the first half of 2018 a net 1,123 stores disappeared from Britain's top 500 high streets compared with a 222 store loss over the equivalent period in 2017. Whilst daily store closures rates have plateaued at 14 stores a day, store openings have fallen, with a 773 difference between store opening in H1 2017 and H1 2018. The research identified that supermarkets, ice cream parlours, booksellers, stationers, and coffee shops showed the highest increase in net store numbers in the first half of 2018. Whilst a continuing decline of electrical goods retailers, pubs, fashion shops, charity shops and Italian restaurants were recorded.

3.2.5 Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates. This together with consumers doing more of their shopping online has resulted in a number of retailers restructuring (some involving a Company Voluntary Arrangement (CVA)) or going into administration including:

- M&S's announcement that it will close 30 clothing and homes stores by 2021 (November 2016), with 14 already closed in 2018;
- Debenham's announcement that 10 of its 176 UK stores will be closing, 2 of which already have (Farnborough and Eltham) (April 2017);
- House of Fraser entering into administration albeit immediately purchased by Sports Direct. At the time of writing it is not clear how many store closures will take place (August 2018);
- New Look's announcement of its intention to close 85 stores following a restructuring plan (November 2018);
- Maplin entering into administration resulting in the closure of their 200+ stores (February 2018);
- Toys R Us going into administration closing all of its 105 stores (February 2018);
- Laura Ashley's announcement that it plans to reduce the number of its UK stores from 160 to 120 (December 2018);
- Coast entering into administration with Karen Millen buying part of the business excluding 24 retail stores (October 2018);
- Carpetright's announcement of its restructuring and closing some 81 of its 400 stores (April 2018);
- Fenwick department store's announcement to "modernise and reorganise the business" which could potentially involve store closures (April 2018);
- Homebase's owners (Hilco) announcement of closing a further 42 stores (61 in total) as part of a proposed CVA by early 2019 (August 2018)
- Mothercare has announced that it will close 50 of their 137 UK stores (May 2018);
- Poundworld going into administration closing all 355 of its stores (June 2018); and

- HMV going into administration (for the second time in 6 years) announcing it is to close all of their 125 stores (December 2018).

3.2.6 It is clearly evident that trading conditions for a number of retailers are tough. Such closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.

3.2.7 However, such changes have also brought forward opportunities for different types of retailer. Some available units in town centres, including former BHS units, have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilko. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which generally operate at the lower end of the market.

3.2.8 In addition to national multiple retailers, independent traders, face pressure from both the internet and national multiple retailers. Such trader's success lie in them being able to offer a product/service not available elsewhere, or a service/shopping experience not offered by national multiple retailers.

3.2.9 It is evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.

3.2.10 The polarisation of retailing will result in larger more dominant centres continuing to attract key retailers (that have development programmes), with medium/smaller sized town centres potentially struggling to attract investment. District/local centres should be less affected and are likely to retain their attraction for top-up/day-to-day shopping.

3.3 Continued Growth in Internet & Multichannel Retailing

3.3.1 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian identifies that at 2017 'special forms of trading' (which includes internet, mail order and market sales) comprised an estimated 15.7% of total UK retail sales, which compares to a market share of just 5.6% at 2006. Experian estimates that the value of non-store sales in the UK at 2017 was £60.3 billion. It estimates that special forms of trading will increase further to 18.2% of retail expenditure at 2021. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 20.9% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).

3.3.2 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 5G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone has increased by nearly double since 2011 (from 36% to 66%).

3.3.3 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years which are clearly having an impact on retailers and town centres. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter, or at "pods" in supermarket car parks, is also increasing in popularity, with the service accounting for over 50% of John Lewis internet orders. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home (multichannel retailing). More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges the importance of 'click and collect' highlights that physical stores within town centres will still have a significant role in the multichannel shopping environment.

3.3.4 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.4% for convenience goods at 2018, increasing to 4.2% at 2023 and to 4.8% at 2028 and 5.2% by 2034. For comparison goods, the adjusted allowance is 15.4% at 2018, increasing to 17.4% at 2023, 17.6% at 2028 and 17.9% at 2034.

3.4 The Continued Rise of the Grocery Discounters

3.4.1 Shoppers have turned away from food superstores in recent years. Mintel attributes the problems which face superstores to two principal factors.

3.4.2 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

3.4.3 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have become an attractive alternative to both large food superstores and to convenience stores.

3.4.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four or five years. As Figure 3.1 below indicates, Tesco has suffered a 1.9 percentage point reduction in its share of the food retail market between 2012 and 2018, and Morrison's has suffered a 1.4 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 59.6% in 2012 to 53.8% in 2018 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 2.6% to 6.6% (equating to an increase of 4 percentage points) between 2012 and 2018.

Figure 3.1: Market Share of Key UK Food Retailers

Operator	2012	2013	2014	2015	2016	2017	2018
Tesco	23.9%	23.0%	23.3%	22.8%	22.6%	22.1%	22.0%
Sainsbury's	13.1%	12.9%	13.1%	12.8%	12.6%	12.2%	12.1%
Asda	13.3%	13.0%	13.0%	12.0%	11.3%	11.4%	11.3%
Morrison's	9.3%	8.9%	9.2%	8.6%	8.6%	8.3%	8.4%
Aldi	2.6%	3.3%	4.3%	4.8%	5.5%	6.0%	6.6%
Co-operative Food	5.4%	5.1%	5.2%	5.1%	4.9%	4.7%	4.7%
Waitrose	3.6%	3.7%	3.8%	4.0%	3.9%	3.9%	3.9%
Marks & Spencer	3.7%	3.7%	3.9%	4.0%	4.1%	4.1%	4.1%
Lidl	2.0%	2.0%	2.2%	2.5%	3.2%	3.2%	3.3%
Iceland	1.9%	1.9%	2.0%	2.0%	2.0%	2.0%	2.2%

Source: UK Food & Grocery Retailer Update, Global Data, February 2018

3.4.5 The current/recent strategy of the big four operators is twofold: (1) the development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.

3.4.6 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) is in response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'.

3.4.7 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses/concessions to take existing floorspace and Sainsbury's acquisition of the Home Retail Group has allowed it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within a number of Sainsbury's. The introduction of additional uses/concessions in foodstores has the potential to take trade away from town centres.

3.4.8 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and intends to open 70 new UK stores in 2018, as part of its target to have more than 1,000 stores by 2022. Aldi's plans include three formats: standard stores of between 18,000 sq ft and 20,000 sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq ft and 14,000 sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq ft to 10,000 sq ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

3.4.9 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years. Lidl's future requirements reportedly comprise units of between 20,000 sq ft and 30,000 sq ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

3.4.10 Partly in response to an ever-increasing competitive grocery market, earlier this year (April 2018) Sainsbury's confirmed plans to merge with Asda. The merger will be subject to a review by the Competition and Markets Authority (CMA) which, if approved, would result in a new grocery market leader. Sainsbury's have announced that they are keeping both the Sainsbury's and Asda fascia's and are not intending on closing any stores. Store closures may however be required as part of the CMA potential approval of the merger.

3.5 The Food and Drink Sector

3.5.1 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Barclaycard data identifies that spending in restaurants in the first quarter of 2017 was up 12.2% year-on-year.

3.5.2 Local Data Company (LDC) reports that the number of food and drink outlets in town centres had gone up by 6,000 between 2011-2016 whilst the number of town centre bars, pubs and night clubs fell by about 2,000. The largest food and drink growth areas included lounge bars (116%), cake makers (51%), juice bars (46%) and coffee shops (31%). In 2017, LDC reported the number of new food and beverage outlets opening in the UK reached a peak of around 743 new units per year. However, over the last year or so there is evidence that the food and drink market is becoming saturated with the likes of the following outlets restructuring, closing outlets, or going into administration:

- Byron Burger;
- Prezzo;
- Strada;
- Jaime's Italian;
- Gourmet Burger Kitchen; and
- Chimichanga.

3.5.3 Food and drink operators now require units which are in amongst the retail heart of a centre. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.

3.5.4 Mintel also reports that although the three biggest operators, Odeon, Vue and Cineworld, still dominate the cinema market and account for 60% of the total UK cinema screens, there has been a steep increase in the number of independent screens. Niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development. Mintel reports that the growth of 'event cinema' and diverse food and drink offerings provided by independents means cinema is becoming a destination for consumers who are not typical cinema fans.

3.5.5 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, The Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage users, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and The Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 by 2019. Pure Gym is now the private health and fitness club market leaders in terms of both venue numbers (160 clubs) and memberships. The Gym Group and Anytime Fitness now also both have over 100 clubs (May 2018), with Xercise4Less, having over 50 gyms.

3.5.6 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. Such concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

3.6 Brexit

3.6.1 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are being negotiated with the Commission now that 'Article 50' has been formally triggered.

3.6.2 Global Data published an analysis following the Autumn 2017 budget and its impact on retail, in which it acknowledges that the retail growth forecast is clouded by the lack of information on the government's policy on Brexit negotiations. Therefore, despite the referendum being over 2 years ago, there is still limited information and clarity on the changes arising from the UK's pending removal from the European Union. As such, there will be a need to monitor the impacts arising from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

3.7 Potential Impact of Trends on Swale Borough Town Centres

3.7.1 The town centres in the Borough continue to face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing, and out-of-centre retail/leisure developments. These challenges will impact on the future strategy for the town centres.

3.7.2 It is important for the three town centres in Swale are able to respond to continued changes in the retail and leisure sector and to provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

3.7.3 The continued growth of new out-of-centre/retail park formats represents a threat to the future vitality and viability of the boroughs town centres. In order to protect the vitality and viability of centres it is important therefore that the Council not only just control the expansion/change of use of out-of-centre development but also plan positively for town centre/edge-of-centre development opportunities.

3.7.4 Town Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

(1) provide a good mix/variety of retail and leisure uses;

(2) attract a mix of additional land uses beyond retail/leisure, including residential, educational, community and office uses;

(3) build on existing cultural/heritage/tourist attractions;

(4) enhance existing town centre markets and speciality retailing;

(5) provide a high quality shopping/leisure experience;

(6) provide convenient, affordable and accessible town centre parking;

(7) promote and encourage events in the town centre;

(8) embrace, and not compete against, multi-channel retailing; and

(9) be responsive to changes in technology (the 'digital high street').

3.7.5 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres, be a focus/hub for their communities, and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

4.0 Original Market Research

4.1 Introduction

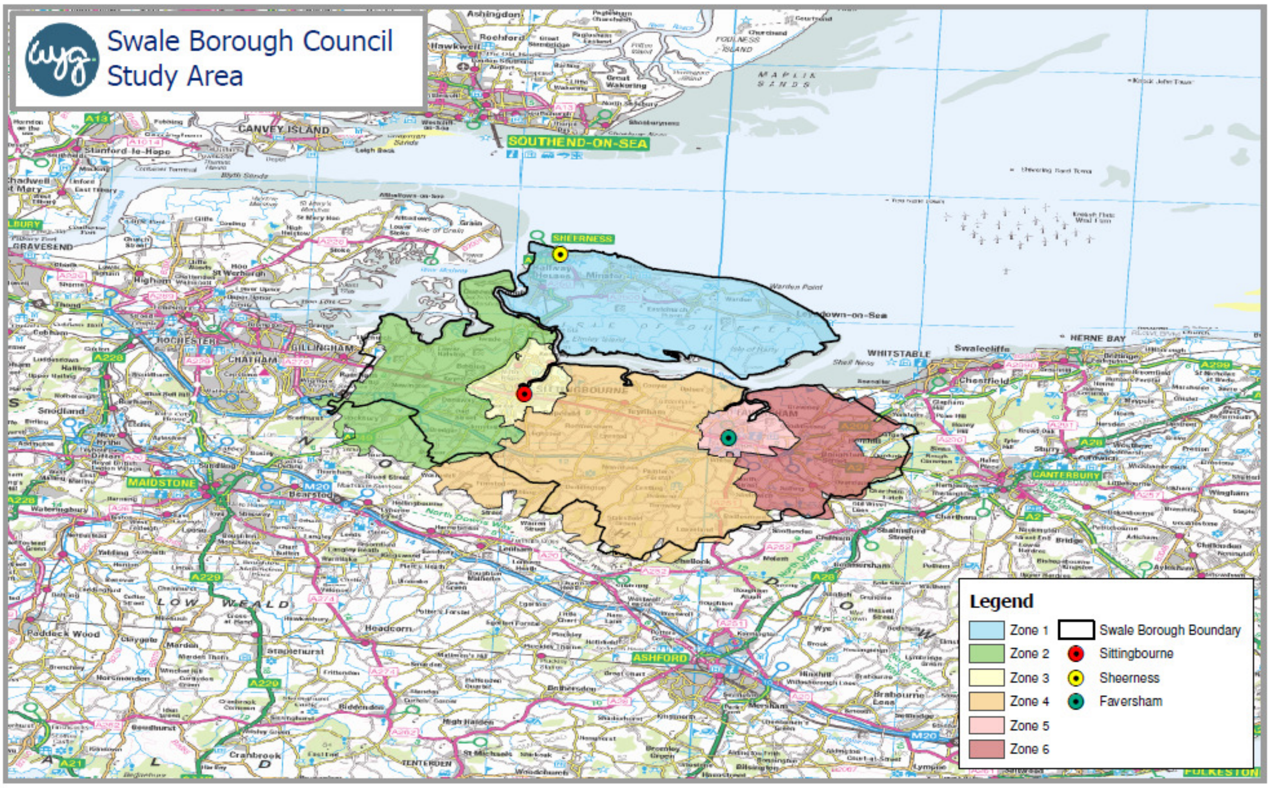
4.1.1 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.1.2 A key requirement of this Study is the detailed understanding of shopping and leisure patterns in terms of the use of centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.

4.2 Telephone Household Survey

4.2.1 In September 2018, a survey of 600 households was undertaken across the defined Study Area which comprises 6 separate zones. Figure 4.1 below shows the Study Area.

Figure 4.1: Study Area



4.2.2 In accordance with the commission brief the adopted study area zones are the same as those adopted in the previous 2010 Retail and Town Centre Study undertaken on behalf of the Council. Utilisation of the same zones enables comparison of any changes in shopping patterns since 2010 across the borough.

4.2.3 Figure 4.2 below details the postcode sectors which make up the survey zones. Zone 1 comprises the Isle of Sheppey; Zone 2 the west of Sittingbourne; and Zone 3 centred around. Zone 4 represents the mid part of the Borough located between Faversham and Sittingbourne, with Zone 5 around the urban area of Faversham and Zone 6 to its east.

Figure 4.2 Postcodes by Survey Area

Survey Zone	Postcode Sector
Zone 1 - Isle of Sheppey	ME 11 5, ME12 1-4
Zone 2 - Borough West	ME9 7, ME 9 8
Zone 3 - Sittingbourne	ME10 1-5
Zone 4 – Central Borough	ME9 0, ME9 9, ME 13 0
Zone 5 - Faversham	ME13 7, ME13 8
Zone 6 - Borough East	ME13 9

4.2.4 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 10 of this study.

5.0 Retail Patterns and Market Share Analysis

5.1 Introduction

5.1.1 Drawing on the findings of the household telephone survey this section analyses the convenience and comparison goods retail market share patterns within the Study Area. In order to provide some context for these market share patterns this section firstly:

- provides an overview of the socio demographic context of the Council area;
- sets out the sub-regional centre hierarchy;
- summarises the existing retail and leisure provision in Swale;
- summarises existing retail and leisure facilities within the main competing centres.

5.1.2 An analysis of leisure market share patterns is provided as part of the commercial leisure need assessment set out in Section 11 of the study.

5.2 Socio Demographic Context of the Council Area

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the administrative area of Swale Borough. A national UK average is also provided so as to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix A**.

Figure 5.1 – Experian Mosaic Profiling (%)

Mosaic Group	Study Area	UK Average
Population (Adults 18+)	113,083	-
A: City Prosperity	0.0	4.3
B: Prestige Positions	3.8	7.2
C: Country Living	7.0	6.9
D: Rural Reality	11.0	6.8
E: Senior Security	10.2	8.0
F: Suburban Stability	9.0	6.0
G: Domestic Success	8.3	8.4
H: Aspiring Homemakers	16.5	9.1
I: Family Basics	8.7	7.2
J: Transient Renters	7.2	5.6
K: Municipal Challenge	1.9	5.8
L: Vintage Value	5.5	6.1
M: Modest Traditions	6.7	4.6
N: Urban Cohesion	0.1	5.0
O: Rental Hubs	1.6	7.7
U: Unclassified	2.5	1.4
Total	**100**	**100**

Source: Experian Mosaic Reports, August 2018
Notes: Population derived from Mosaic report – 2016 estimate Adults 18+

5.2.2 The Experian Mosaic results highlight that when compared to the UK average Swale Borough contains:

- A slightly higher proportion of residents within the 'Family Basics' (8.7% compared to 7.2%) category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and an almost identical proportion within the 'Domestic Success' (8.3% compared to 8.4%) category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs);
- a higher proportion of residents within the 'Aspiring Homemakers' (16.5% compared to 9.1%) category (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);
- a lower proportion of residents in the 'Prestige Positions' (3.8% compared to 7.2%) category (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving);
- a higher proportion of residents in the 'Transient Renters' (primarily younger population in low cost/social accommodation) category (7.2% compared to UK average of 5.6%);
- a lower proportion of residents (1.9% compared to 5.8%) within the 'Municipal Challenge' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats);
- a higher proportion of residents within the 'Suburban Stability' (9.0% compared to 6.0%) (couples with mid-range incomes/pre-retirement couples with respectable incomes/single mature in intermediate occupations/active families with teens/adult children);
- a slightly lower proportion of residents within the 'Vintage Value' (5.5% compared to 6.1%) (ageing/elderly in social/low value homes/retirement homes), yet a slightly higher proportion within 'Senior Security' (10.2% compared to 8.0%) (elderly in affordable/comfortable/standard homes) categories; and
- there are currently a very small proportion of residents within the Borough in the 'City Prosperity' category.

5.2.3 Whilst the Mosaic results generally highlight that Swale Borough has a higher proportion of residents within the rural and senior Experian Mosaic categories it also highlights that the Borough contains a higher proportion of aspiring young families/singles.

5.2.4 The socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre.

5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A more detailed tabulation of retail rankings data is also provided which shows the historic performance of the centres in the preceding 2009 Rankings.

Figure 5.2: Sub-regional Centre Rankings

Centre	Classification	2010 Rank	2016 Rank	Change in Rank 2010-2016
Maidstone	Major Regional	51	52	-1
Canterbury	Regional	74	67	+7
Chatham	Sub-Regional	197	200	-3
Ashford	Sub-Regional	162	205	-42
Dartford	Sub-Regional	206	292	-86
Sittingbourne	**District**	**408**	**408**	**0**
Gillingham	District	398	654	-256
Sheerness	**District**	**845**	**696**	**+149**
Faversham	**District**	**1,139**	**710**	**+429**
Whitstable	District	1,247	879	+368
Herne Bay	Minor District	845	1,325	-480

Source: VenueScore 2010 and 2016 Rankings

5.3.2 Figure 5.2 shows that Sittingbourne is identified as a District Centre and has seen no change in its ranking between 2010 and 2016. Both the centres of Sheerness and Faversham, are also classified as District Centres, and have improved their rankings since 2010, with Faversham having a substantial increase by some 429 points. Gillingham, located approximately 12 miles north west of Sittingbourne, is also a District Centre and has seen a decrease in its ranking by some 256 points since 2010. Nearby centres of Ashford, Chatham and Dartford continue to be ranked higher than Sittingbourne in VenueScore Rankings as Sub-Regional Centres, although all of which have seen a fall within their position since 2010. Maidstone and Canterbury are larger centres classified as Major Regional and Regional respectively and have higher rankings than any of the centres within the Borough.

5.3.3 As noted earlier the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

5.4 Existing Retail & Leisure Provision in Swale Borough

5.4.1 Provided below is a summary of existing retail and leisure provision in the Borough.

Sittingbourne

5.4.2 Sittingbourne Town Centre is the principal shopping and leisure location in the Borough. The town centre is located within the north west of the Borough around 6 miles to the north east of Maidstone and west of Canterbury. The centre provides a mix of retail and leisure facilities including some 28,070sq m gross of retail floorspace, 6,250sq m of retail service floorspace, 16,020sq m gross of leisure service floorspace and 3,950sq m gross of financial and business services floorspace (source: Experian Goad Survey, September 2018).

Faversham

5.4.3 Faversham is a historic market town located in the eastern part of the borough. The town is located approximately 7 miles to the east of Sittingbourne and 8 miles to the west of Canterbury. The town centre is relatively compact in nature, accommodating circa 36,000sq m gross of commercial floorspace (source: Experian Goad Survey, September 2018). In commercial floorspace terms Faversham is the smallest town centre in the Borough. Comparison goods retailers occupy the largest amount of floorspace (10,710 sqm). The town centre also provides 8,650sq m gross of leisure service floorspace together with convenience retail floorspace of 7,430 sqm, 3,250 sqm gross of retail service floorspace and 2,500 sqm of financial and business service floorspace. In addition to retail and commercial leisure facilities, the town centre also contains residential, office uses, places of worships and also the Shepherd Neame Brewery. These uses attract people to the town centre for reasons other than purely shopping and/or leisure.

Sheerness

5.4.4 Sheerness is located in the north western part of the Isle of Sheppey. Retail and commercial leisure floorspace (42,150sq m gross) in the town centre is primarily focused on High Street and The Broadway. Approximately half of the total floorspace is comprised of convenience and comparison goods floorspace (11,120 sqm and 10,450 sqm respectively). The centre also provides 9,290 sqm of leisure service floorspace, 4,900 sqm retail service, and 2,940sq m financial and business service floorspace. Alongside these uses, the town centre also provides a park, sport and leisure complex, places of worship, some limited residential, office and a further education college.

Local Centres

5.4.5 Overall there are 11 local centres within the Borough. The existing local centres are:

- Queenborough;
- Rushenden;
- Minster;
- Halfway Houses;
- Eastchurch;
- Leysdown;
- Iwade;
- Newington;
- Milton Regis;
- Teynham; and
- Boughton

5.4.6 The local centres provide important local day-to-day shopping facilities/services for their surrounding local residential areas. Figure 5.4 below summarises the total number of units in each centre.

Figure 5.4: Local Centres in the Borough

Local Centre		No. of Units	Key Anchor Stores
No	Name		
1	Queenborough	14	Co-op
2	Rushenden	1	-
3	Minster	13	Londis, Costcutter
4	Halfway Houses	32	Premier, Costcutter
5	Eastchurch	9	Londis, Costcutter
6	Leysdown	30	Premier
7	Iwade	6	Nisa Local
8	Newington	10	Co-op
9	Milton Regis	30	McColls, Lloyds Pharmacy
10	Teynham	24	Co-op, Costcutter
11	Boughton	7	-

Source: WYG Surveys, September 2018

5.4.7 Further details and vitality and viability health check assessments of Sittingbourne, Sheerness and Faversham town centres and the 11 local centres are provided in Sections 6-9 of the study.

Out-of-Centre Retail/Leisure Provision

5.4.8 In terms of out-of-centre retail and leisure provision the majority of the retail/leisure parks in the Borough are located in the Sittingbourne urban area. Figure 5.5 below provides details of the main retail/leisure parks and sets out the current key occupiers.

Figure 5.5: Main Out-of-Centre Retail/Leisure Parks in Swale Borough

	Distance from nearest Town Centre	No. of Units	Vacant Units	Key Occupiers
Sittingbourne Retail Park	0.2 miles	14	2	Halfords, M&S Foodhall, Dreams, Pets at Home, Bensons for Beds, Dunelm, Carpetright, Currys/PC World, Bunnings Warehouse, KFC, McDonald's and Pizza Hut
Trinity Trading Estate, Sittingbourne	0.8 miles	7	-	Asda, Howdens, Travis Perkins, Screwfix, National Tyres and Autocare, A2 Tyre Supplies, Formula 1 Autocentre
Spring Retail Park, Sittingbourne	0.1 miles	3	0	Iceland Food Warehouse, Home Bargains and Costa Coffee
Neats Court Retail Park, Queenborough	3.3 miles	13	1	The Original Factory Shop, B&M, Iceland, Poundland, Cancer Research, Sports Direct, Costa, Subway, Mote Park, Burger King, Starbucks and Marston's

Source: WYG Surveys, September 2018 and Completely Retail

5.4.9 There is also a good provision of out-of-centre foodstores in the Swale Borough area including the following large foodstores:

Sittingbourne:

- Asda, Trinity Trading Estate - 4,569sq m gross floorspace
- M&S Foodhall, Mill Way - 7,625sq m gross floorspace
- Morrison's, Mill Way - 6,739sq m gross floorspace
- Iceland Food Warehouse, Eurolink Way - 1,200sq m gross floorspace

Faversham:

- Morrisons, North Lane - 2,528sq m gross floorspace
- Sainsbury's, Bysing Wood Road - 4,549sq m gross floorspace

Sheerness:

- Morrisons, Neats Court - 5,116sq m gross floorspace

5.5 Surrounding Main Large Centres

5.5.1 The town centres within the Borough do not operate in isolation, particularly given the proximity of the Borough to larger regional retail/leisure centres. It is important to understand the nature of the existing and emerging retail offer in the surrounding 'competing' centres given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.

5.5.2 The surrounding centres which the household survey shows have an influence on shopping patterns in Swale are: Canterbury, Maidstone, Ashford and Chatham and Bluewater Shopping Centre.

Maidstone

5.5.3 Maidstone Town Centre is the main centre within Maidstone Borough located approximately 12 miles to the south west of Sittingbourne. The latest Retail Study was undertaken by DTZ in August 2013 and identifies the centre has some 580 units and 143,349sq m of retail and leisure floorspace, of which almost half (48%) is occupied by comparison goods retailers. This is followed by leisure services which comprise 16.5% of the total floorspace. The centre has some 28 of the 31 'major' retailers defined by Experian. Turning to convenience retail provision, the study identifies it has a slightly lower number of units than the South East average (37.9% compared to 43.1%).

5.5.4 The Study identifies that there is capacity for around 12,400sq m of additional comparison goods net sales floorspace by 2021, rising to 23,700 at 2031. For convenience goods, there is capacity for an additional 4,400sq m net sales floorspace at 2021, increasing to 6,100sq m at 2031. For majority of comparison goods floorspace capacity is directed towards Maidstone Town Centre (22,650sq m at 2031) with a smaller proportion of the total convenience floorspace capacity directed towards the town centre (1,800sq m at 2031).

Canterbury

5.5.5 Canterbury City Centre is identified as the primary focus for retail development and is situated at the top of the retail hierarchy within the Canterbury District Local Plan 2017. Canterbury is a historical cathedral city and a UNESCO World Heritage Site. The city is located approximately 10 miles to the east of Faversham and 16 miles east of Sittingbourne.

5.5.6 GL Hearn prepared the latest Canterbury Retail and Leisure Study published in June 2015. The study notes that the city's economy is heavily geared towards the tourism sector and combines a heritage and commercial offer. The city centre comprises 101,019sq m floorspace across 461 units. The majority of these are in comparison use (43%), followed by leisure service (27%) and then retail service (9%). The study highlights that the city has a strong comparison offer and notes than 59% of units are multiple retailers and the centre benefits from three department stores (Fenwicks, Debenhams, and M&S). The retail service is noted to be dominated by health and beauty services and some 5% below the national average, whilst leisure services are around 5% higher.

5.5.7 The retail study identifies that there is no quantitative or qualitative need for new convenience floorspace in the short term due to the commitments including Sainsbury's at Herne Bay and Aldi at King's Road. By 2031, the study identifies that there is capacity for around 2,608sq m floorspace. For comparison goods, there is capacity forecast for around 8,645sq m net floorspace at 2020 increasing to 19,924sq m net at 2025 and further to 33,800sq m net by 2031.

Ashford

5.5.8 Ashford is located approximately 13 miles to the south of Faversham and is the largest centre within Ashford Borough Council. The Area Action Plan for the town identifies there are five defined quarters within the town centre, each with a recognisable character: Town Centre Core; Civic Quarter; Commercial Quarter; Residential Transitional Quarter; International Station Quarter; and Southern Expansion Quarter. The main retail uses are located in the town centre core on a traditional linear High Street alongside The Park Mall and Country Square Shopping Centres.

5.5.9 The latest Retail Needs and Leisure Assessment was published in June 2015. The study identifies that within the primary shopping streets the centre has 227 units and a further 101 in shopping centres in retail/leisure use in 2014. The centre has a relatively low convenience provision with only 2% of units recorded in this use. The proportion of convenience units is more in line with the UK average. The study highlights the retail service provision is particularly high at around 34% compared to 25%, whilst the leisure services are below the UK average by 7%. The study notes that town centre lacks a major leisure facility such as a cinema.

5.5.10 Turning to future demand, the study identifies that there is no convenience capacity until 2030 due to the planned foodstores at Chilmington Green and Cheeseman's Green. At 2030, there is a requirement for around 2,511sq m net new convenience floorspace, which the study recommends is directed towards Ashford Town Centre. For comparison goods, the study identifies there is no capacity in the short term up to 2020, by 2025 there is forecast capacity for 8,631sq m net floorspace increasing to 18,807sq m net floorspace. Of this, 12,213sq m of the capacity at 2030 is for Ashford Town Centre.

5.5.11 Ashford Designer Outlet is located on the periphery of the town centre and has around 80 retail stores with a mix of high street national multiples and several 'premium' retailers in addition to a food court. The centre is currently undergoing £90million expansion of around 9,000sq m floorspace, which will see an additional 50 luxury and premium brands opening, a new food piazza, events space and children's play area.

Chatham

5.5.12 Chatham Town Centre is identified as the main town centre within Medway, as defined within the Local Plan 2003, supported by five smaller District Centres. Chatham is located some 9 miles to the west of Sittingbourne. The centre comprises a partially pedestrianised High Street which links with Rochester District Centre to the north west. The focus of the retail activity is along the High Street and at the Pentagon Shopping Centre.

5.5.13 The Retail and Commercial Leisure Assessment prepared by GVA in 2016 identifies the town centre has some 408 units offering 76,300sq m net floorspace. The study notes that it has a retail offer which is towards the 'lower middle' end of the market and the Pentagon Shopping Central appearance could benefit from investment and modernisation. Despite this, the more recent Volume 2 Retail and Commercial Leisure Assessment (March 2018) noted that the most common purpose of visit to the town centre was for non-food shopping.

5.5.14 The study identifies there is no capacity for Medway as a whole for comparison goods floorspace until 2025, at which time there is forecast capacity of 14,300sq m net floorspace rising to 61,100sq m net in 2037. For convenience goods, the 2016 study notes that there is capacity for around 8,600sq m net floorspace at 2020 for Medway rising to 15,700sq m net at 2037.

Bluewater Shopping Centre

5.5.15 Bluewater Shopping Centre, located within Dartford Borough, opened in 1999 and attracts around 27 million visitors per year. The shopping centre is situated approximately five miles east of Dartford and 23 miles west of Sittingbourne. The centre offers over 300 stores, 50 restaurants, cafes and bars and a 13-screen cinema, crazy golf, trampoline park, and soft play/adventure park.

5.5.16 The latest retail study for Dartford, prepared by GVA, the Retail and Commercial Leisure Study 2010, identifies Bluewater as one of Europe's largest indoor retail and leisure complexes. The study reports there is a total of 145,226sq m of retail floorspace across 358 units. Comparison retailers have a strong presence in the centre comprising 66% of the total units and almost 80% of the floorspace. Convenience provision is more limited at just 4% of the total unit number. Service units include food and drink uses alongside banks and travel agents and equate to around 21% of all units. Major retailers Marks and Spencer, John Lewis and House of Fraser anchor the store.

5.5.17 Outline planning permission (reference. 16/01207/OUT) was granted by Dartford Borough Council Development Control Committee in April 2017 for extensions and alterations to the shopping centre, most notably the West Village section of the shopping centre alongside separate extensions to the main shopping centre creating larger units and a re-configured layout. The permission granted an additional 30,000sq m floorspace for retail and catering space alongside reconfiguration of the town square, car park and relocation of the coach park. The extensions to the main shopping centre total around 16,850sq m, whilst the West Village extension will be approximately 14,750sq m. Condition 31 restricted the amount of convenience goods retail to not exceed a net additional 1% of the new floorspace. Conditions 32 and 33 of the permission restricted the amount of comparison floorspace to be a minimum of 51% and a maximum of 28,500sq m of the total additional floorspace permitted, and a maximum of 2,500sq m of additional floorspace to be used for use classes A3/A5.

5.5.18 The reserved matters for Phase 1 was approved in August 2017 with a number of conditions discharged since this time.

5.6 Shopping Patterns

5.6.1 This section contains a summary of the convenience and comparison goods shopping patterns within the study area. Both main food and top-up convenience goods shopping patterns are analysed and for comparison goods - combined comparison goods, bulky comparison goods and non-bulky comparison goods shopping patterns (excluding clothing and footwear) are examined separately. In addition, an analysis of the shopping patterns within each town associated with clothing and footwear purchases is also undertaken.

Convenience Goods Shopping Patterns

Main Food Shopping

5.6.2 The survey responses identify that respondents in Zone 1 (Isle of Sheppey) primarily undertake their main food shopping on Sheppey itself (88%). Of these, the majority are captured by stores in Sheerness Town Centre (67%), the Morrisons store at Neats Court Retail Park capturing 20% and other locations capturing the remaining 1%. Most of the other food shopping trips from Zone 1 are made at stores in Sittingbourne with 2% made at stores within the Town Centre, and 7% at other locations including the Asda store at the Trinity Trading Estate (4%) and at Morrisons on Mill Way (2%).

5.6.3 For Zone 2 (Borough West), 71% of main food shopping trips take place inside the Borough. Sittingbourne attracts the majority of these trips (57%), with the town centre stores capturing 24% and other stores outside of the town centre capturing 33%. Stores on the Isle of Sheppey capture 9% of trips, whilst some 24% of respondents carry out their main food shopping trips outside of the Borough. These locations include Gillingham (15% of trips), Maidstone (4%) and Rainham (3%).

5.6.4 In terms of Zone 3 (Sittingbourne), Sittingbourne also attracts the majority (89%) of main food shopping trips. Stores within Sittingbourne Town Centre attract 37% while other stores in Sittingbourne capture 52% of trips. 5% of respondents in Zone 3 last undertook their main food shop via the Internet.

Figure 5.6: Principal Main Food Shopping Patterns

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**97%**	**71%**	**93%**	**94%**	**87%**	**62%**
Sittingbourne	**9%**	**57%**	**89%**	**43%**	**5%**	**5%**
Sittingbourne Town Centre	2%	24%	37%	28%	4%	3%
Sittingbourne Other	7%	33%	52%	15%	1%	2%
Faversham	**0%**	**0%**	**1%**	**50%**	**82%**	**57%**
Faversham Town Centre	0%	0%	1%	11%	38%	35%
Faversham Other	0%	0%	0%	39%	45%	22%
Isle of Sheppey	**88%**	**9%**	**2%**	**0%**	**0%**	**0%**
Sheerness Town Centre	67%	7%	2%	0%	0%	0%
Neats Court Retail Park	20%	2%	0%	0%	0%	0%
Other	1%	0%	0%	0%	0%	0%
Other locations inside of the Borough	**0%**	**5%**	**0%**	**0%**	**0%**	**0%**
Outside Borough	**1%**	**24%**	**2%**	**3%**	**11%**	**34%**
Canterbury	0%	1%	1%	1%	3%	14%
Gillingham	0%	15%	0%	0%	0%	1%
Whitstable	0%	2%	0%	1%	8%	14%
Other locations outside of the Borough	1%	7%	1%	1%	0%	5%
Internet/Delivery	**2%**	**4%**	**5%**	**3%**	**2%**	**3%**

Source: Derived from NEMS Household Survey Results (September 2018)
Note: Figures may not add due to rounding

5.6.5 94% of main food shopping trips within Zone 4 (Central Borough) are made within Swale, 50% of which are captured by Faversham and 43% by Sittingbourne. Of the trips within Faversham, 39% are made to stores outside of the Town Centre. In Sittingbourne, town centre stores account for 28% and other stores 15% of trips. Only 3% of respondents within Zone 4 did their main food shopping outside of the Borough.

5.6.6 Within Zone 5 (Faversham), 82% of main food shopping trips are retained in Faversham. Of these, 38% are captured by the Town Centre stores and 45% by other stores elsewhere in the town. Sittingbourne attracts 5% of main food shopping within this Zone, while 11% of trips are made outside of the Borough with Whitstable capturing 8% and Canterbury 3% of trips.

5.6.7 Finally, in terms of Zone 6 (Borough East), 34% of main shopping trips are captured by stores outside of Swale, primarily at Canterbury and Whitstable. Inside Swale, 35% of trips are made to Faversham Town Centre, 22% to other stores within Faversham and 5% of trips are made to Sittingbourne.

5.6.8 Overall, the retention rates of main food shopping trips within the Borough are considered to generally be good.

Top-Up Shopping

5.6.9 Figure 5.7 identifies that Swale retains 99% of top-up shopping trips from Zone 1 (Isle of Sheppey), with 94% retained on the Isle of Sheppey and 5% in Sittingbourne. Of the trips retained within Sheppey, 48% are captured by town centre stores, 24% by stores at Neats Court Retail Park and 22% at other locations.

5.6.10 For Zone 2 (Borough West), Sittingbourne attracts 52% of top-up shopping trips, 24% of which are captured by town centre stores and 28% by stores in other locations in the town. The remainder of trips are primarily made at facilities within the Borough but outside of the 3 towns (33%) and at stores outside of the Borough (12%).

5.6.11 Sittingbourne retains 92% of top-up shopping trips from its zone (Zone 3). Of these, 35% of trips are made at town centre locations and 57% to other locations in the town. 5% of top-up trips are made to other locations outside of the three main towns within the Borough.

Figure 5.7: Principal Top-Up Food Shopping Patterns

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**99%**	**88%**	**98%**	**93%**	**95%**	**72%**
Sittingbourne	**5%**	**52%**	**92%**	**28%**	**0%**	**8%**
Sittingbourne Town Centre	0%	24%	35%	19%	0%	3%
Sittingbourne Other	5%	28%	57%	8%	0%	5%
Faversham	**0%**	**1%**	**1%**	**42%**	**95%**	**62%**
Faversham Town Centre	0%	1%	0%	19%	65%	41%
Faversham Other	0%	0%	1%	23%	30%	21%
Isle of Sheppey	**94%**	**2%**	**0%**	**0%**	**0%**	**0%**
Sheerness Town Centre	48%	2%	0%	0%	0%	0%
Neats Court Retail Park	24%	0%	0%	0%	0%	0%
Other locations on the Isle of Sheppey	22%	0%	0%	0%	0%	0%
Other locations inside of the Borough	**0%**	**33%**	**5%**	**23%**	**0%**	**1%**
Outside Borough	**1%**	**12%**	**2%**	**7%**	**5%**	**27%**
Canterbury	0%	0%	1%	2%	3%	5%
Gillingham	0%	6%	0%	0%	0%	0%
Whitstable	0%	0%	0%	4%	1%	16%
Other locations outside of the Borough	1%	7%	1%	1%	0%	6%
Internet/Delivery	**0%**	**0%**	**0%**	**0%**	**0%**	**1%**

Source: Derived from NEMS Household Survey Results (September 2018)
Note: Figures may not add due to rounding

5.6.12 Within Zone 4 (Central Borough), the highest proportion of top-up shopping trips take place at Faversham (42%) with 23% attracted to stores outside the town centre with 19% inside. Sittingbourne is the second most popular destination for top-up shopping trips from this zone attracting 28% of trips. Facilities outside of the main towns within the Borough attract 23% of top-up shopping trips, with Teynham Local Centre attracting 22% of these trips. Only 7% of top-up shopping trips take place at shops located outside of the Borough.

5.6.13 Faversham retains 95% of top-up shopping trips from its zone (Zone 5), with 65% made in town centre stores and 30% in other locations within the town. The remaining 5% of top-up shopping trips take place outside the Borough.

5.6.14 Faversham retains the majority (62%) of shopping trips from Zone 6 (Borough East). Some 27% of top-up shopping trips take place outside of the Borough with 16% of trips taking place at Whitstable, 5% at Canterbury and 3% at Ashford.

Comparison Goods Shopping Patterns

All Comparison Goods

5.6.15 Within the Isle of Sheppey Zone (Zone 1) retail facilities retain just 29% of comparison goods shopping trips. Of the remaining 71% of trips, 26% take place in Sittingbourne, whilst 21% are attracted to a number of different retail facilities outside the Borough. Just over a fifth of comparison goods shopping on the Isle of Sheppey takes place on the internet.

5.6.16 Within Zone 2 (Borough West), Sittingbourne attracts the highest proportion of comparison goods shopping trips (40%). Overall, the Borough's retention rate of trips is 44%, with 35% of trips taking place outside the Borough and 21% of comparison goods shopping taking place on the internet. Of the trips taking place outside the Borough, Bluewater Shopping Centre attracts the highest proportion (8%).

5.6.17 Bluewater Shopping Centre also has an influence on comparison goods shopping trips in the Sittingbourne Zone (Zone 3) attracting 9% of trips. Sittingbourne itself retains approximately half of trips from the zone whilst the Internet accounts for 23% of comparison goods transactions.

5.6.18 For Zone 4 (Central Borough), 41% of comparison goods shopping trips are retained within the Borough. Sittingbourne attracts 25% (15% in the town centre, 10% in other locations), Faversham attracts 14% (13% in the town centre) and other locations inside the Borough attract 2% of trips. 31% of shopping trips from Zone 4 are made to locations outside of the Borough, with stores in Canterbury (18%) the most popular destination. 29% of comparison shopping within the zone is done via the internet.

Figure 5.8: Comparison Goods Shopping Patterns

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**56%**	**44%**	**52%**	**41%**	**32%**	**18%**
Sittingbourne	**26%**	**40%**	**51%**	**25%**	**7%**	**1%**
Sittingbourne Town Centre	10%	22%	34%	15%	4%	1%
Sittingbourne Other	16%	17%	17%	10%	3%	0%
Faversham	**0%**	**0%**	**0%**	**14%**	**24%**	**16%**
Faversham Town Centre	0%	0%	0%	13%	24%	15%
Faversham Other	0%	0%	0%	1%	0%	1%
Sheerness	**29%**	**2%**	**0%**	**0%**	**0%**	**0%**
Sheerness Town Centre	26%	1%	0%	0%	0%	0%
Neats Court Retail Park	2%	1%	0%	0%	0%	0%
Other locations inside of the Borough	**2%**	**2%**	**2%**	**2%**	**0%**	**0%**
Outside Borough	**21%**	**35%**	**25%**	**31%**	**48%**	**63%**
Canterbury	1%	2%	5%	18%	40%	45%
Ashford	0%	1%	1%	2%	2%	2%
Gillingham	3%	5%	2%	2%	0%	0%
Chatham	1%	3%	1%	0%	1%	0%
Maidstone	6%	6%	3%	1%	0%	3%
Hempstead	2%	5%	2%	1%	0%	0%
Bluewater Shopping Centre	4%	8%	9%	2%	1%	3%
Other locations outside of the Borough	4%	5%	2%	4%	5%	9%
Internet/Delivery	**22%**	**21%**	**23%**	**29%**	**20%**	**19%**

Source: Derived from NEMS Household Survey Results (September 2018)
Notes: Figures may not add due to working

5.6.19 For residents within Zone 5 (Faversham), locations outside of Swale attract the highest proportion of comparison goods shopping trips (48%) with Canterbury proving the most popular destination (40% of trips). Of the locations within Swale, Faversham Town Centre attracts 24% of comparison goods trips and Sittingbourne 7%. Internet shopping accounts for 20% of comparison goods purchases.

5.6.20 Locations outside of the Borough attract the majority (63%) of comparison goods shopping trips from Zone 6 (Borough East). Canterbury attracts 45%, Maidstone and Bluewater both attract 3% with other locations accounting for the rest of these trips. Within Swale, only 16% of trips are made to Faversham and 1% to Sittingbourne. Comparison goods shopping over the internet accounts for a fifth of purchases in the zone.

5.6.21 Overall, with the exception of Zones 5 (Faversham) and 6 (Borough East), retail facilities in the Borough attract the highest proportion of comparison goods trips. Canterbury has a substantial influence on trips in both Zones 5 and 6 (40% and 45% respectively).

Non-bulky Comparison Goods Excluding Clothing & Footwear

5.6.22 Sittingbourne's retention of non-bulky comparison goods shopping trips varies across the Borough's Zones with Zone 1 retaining the highest proportion of trips (57%) and Zone 6 (Borough East) retaining the least (20%). We summarise the other key headline findings below:

- Sittingbourne has an influence on shopping trips across the Borough and, with the exception of Zone 6 (Borough East), attracts residents from each zone.
- Sheerness retains approximately a third of trips from the Isle of Sheppey Zone (Zone 1). Sittingbourne attracts around a fifth of trips with retail facilities outside also attracting around a fifth of trips.
- Faversham retains around a quarter of shopping trips from its zone (Zone 5) and attracts 17% and 20% of trips from Zones 4 (Central Borough) and 6 (Eastern Borough) respectively. It does not attract any trips from other zones.
- Canterbury has a significant influence on shopping patterns in Zones 5 (Faversham) and 6 (Borough East).
- Bluewater Shopping Centre attracts trips from each Borough zone, notably from Zones 2 (Borough West) and 3 (Sittingbourne) where it attracts 10% of trips.
- The influence of internet shopping varies across the zones (between 20% and 33%).

Figure 5.9: Non-Bulky Comparison Goods Shopping Patterns (Excl. Clothing & Footwear)

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**57%**	**43%**	**49%**	**40%**	**34%**	**20%**
Sittingbourne	**21%**	**37%**	**47%**	**20%**	**7%**	**0%**
Sittingbourne Town Centre	8%	24%	38%	14%	5%	0%
Sittingbourne Other	13%	13%	10%	6%	2%	0%
Faversham	**0%**	**0%**	**0%**	**17%**	**27%**	**20%**
Faversham Town Centre	0%	0%	0%	17%	26%	19%
Faversham Other	0%	0%	0%	1%	0%	0%
Sheerness	**34%**	**3%**	**0%**	**0%**	**0%**	**0%**
Sheerness Town Centre	31%	2%	0%	0%	0%	0%
Neats Court Retail Park	3%	1%	0%	0%	0%	0%
Other locations inside of the Borough	**2%**	**3%**	**1%**	**3%**	**0%**	**0%**
Outside Borough	**19%**	**34%**	**23%**	**27%**	**43%**	**59%**
Canterbury	1%	2%	5%	18%	36%	42%
Ashford	0%	0%	0%	1%	2%	2%
Gillingham	2%	2%	1%	0%	0%	0%
Chatham	1%	2%	1%	0%	1%	0%
Maidstone	4%	6%	3%	1%	0%	4%
Hempstead	2%	6%	1%	1%	0%	1%
Bluewater Shopping Centre	5%	10%	10%	3%	1%	3%
Other locations outside of the Borough	3%	6%	2%	5%	3%	9%
Internet/Delivery	**24%**	**23%**	**28%**	**33%**	**23%**	**20%**

Source: Derived from NEMS Household Survey Results (September 2018)
Notes: Figures may not add due to working

Clothing and Footwear

5.6.23 Turning to clothing and footwear shopping patterns in the Borough, Figure 5.10 shows that across all zones, more shopping trips for clothing and footwear are made to destinations outside of Swale than inside. The leakage rates vary from between 48% in Zone 1 (Isle of Sheppey) to 77% within Zone 5 (Faversham). The other key headline findings are summarised as follows:

- Sittingbourne retains just 18% of trips from its zone (Zone 3). It also attracts trips from Zone 2 (Borough West) (19%) and Zone 4 (Central Borough). It has relatively limited influence on trips elsewhere in the Borough.
- Sheerness captures only a quarter of shopping trips from the Isle of Sheppey zone (Zone 1). Maidstone draws a fifth of shopping trips from this zone.

- Faversham captures a relatively small proportion (9%) of shopping trips from its zone (Zone 5) and actually attracts slightly more trips from neighbouring Zone 4 (Central Borough) and Zone 6 (Borough East) (11% and 17% respectively).
- Canterbury again has a significant influence on shopping patterns in Zones 5 (Faversham) and 6 (Borough East) capturing the majority of trips (66% and 52% respectively).
- Bluewater Shopping Centre's influence on clothing and footwear trips is primarily felt in the zones in the western part of the Borough where 15% if trips are attracted from Zone 2 (Borough West) and 24% from Zone 3 (Sittingbourne).
- Internet shopping takes place in all six zones with at least 12% of purchases made online. The internet has the most influence with clothing and footwear purchases in Zone 1 (Isle of Sheppey) where 23% of purchases are made on line.

Figure 5.10: Clothing and Footwear Shopping Patterns

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**29%**	**25%**	**20%**	**22%**	**10%**	**17%**
Sittingbourne	**4%**	**19%**	**19%**	**11%**	**1%**	**0%**
Sittingbourne Town Centre	2%	19%	18%	6%	1%	0%
Sittingbourne Other	2%	0%	2%	5%	0%	0%
Faversham	**0%**	**0%**	**0%**	**11%**	**9%**	**17%**
Faversham Town Centre	0%	0%	0%	9%	9%	10%
Faversham Other	0%	0%	0%	1%	0%	7%
Sheerness	**24%**	**6%**	**0%**	**0%**	**0%**	**0%**
Sheerness Town Centre	21%	1%	0%	0%	0%	0%
Neats Court Retail Park	3%	5%	0%	0%	0%	0%
Other locations inside of the Borough	**1%**	**1%**	**1%**	**0%**	**0%**	**0%**
Outside Borough	**48%**	**60%**	**68%**	**65%**	**77%**	**65%**
Canterbury	2%	6%	11%	39%	66%	52%
Ashford	5%	2%	7%	7%	2%	3%
Gillingham	0%	9%	7%	3%	0%	0%
Chatham	2%	7%	4%	0%	0%	0%
Maidstone	20%	4%	9%	1%	0%	4%
Hempstead	7%	12%	7%	1%	0%	0%
Bluewater Shopping Centre	6%	14%	24%	4%	1%	1%
Other locations outside of the Borough	6%	5%	1%	10%	7%	4%
Internet/Delivery	**23%**	**15%**	**12%**	**13%**	**13%**	**19%**

Source: Derived from NEMS Household Survey Results (September 2018)
Notes: Figures may not add due to working

Bulky Comparison Goods

5.6.24 Retail facilities outside the Borough generally have less of an influence on Swale Borough residents bulky comparison goods shopping behaviour, albeit in Zones 5 (Faversham) and 6 (Borough East) Canterbury has a greater influence on shopping trips.

Figure 5.11: Bulky Goods Shopping Patterns

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
	1	2	3	4	5	6
Inside Borough	**72%**	**54%**	**70%**	**50%**	**27%**	**9%**
Sittingbourne	**56%**	**52%**	**67%**	**43%**	**12%**	**2%**
Sittingbourne Town Centre	14%	20%	30%	23%	5%	2%
Sittingbourne Other	42%	31%	37%	21%	7%	0%
Faversham	**0%**	**0%**	**0%**	**6%**	**15%**	**6%**
Faversham Town Centre	0%	0%	0%	6%	15%	6%
Faversham Other	0%	0%	0%	0%	0%	0%
Sheerness	**16%**	**1%**	**0%**	**0%**	**0%**	**0%**
Sheerness Town Centre	15%	0%	0%	0%	0%	0%
Neats Court Retail Park	1%	1%	0%	0%	0%	0%
Other locations inside of the Borough	**0%**	**0%**	**3%**	**0%**	**1%**	**1%**
Outside Borough	**10%**	**25%**	**15%**	**27%**	**56%**	**70%**
Canterbury	1%	1%	3%	15%	44%	56%
Ashford	0%	0%	0%	4%	1%	3%
Gillingham	5%	7%	2%	1%	0%	0%
Chatham	0%	2%	1%	0%	1%	0%
Maidstone	1%	7%	2%	0%	0%	2%
Hempstead	1%	3%	0%	0%	0%	0%
Bluewater Shopping Centre	0%	2%	5%	1%	0%	3%
Other locations outside of the Borough	1%	3%	1%	5%	8%	5%
Internet/Delivery	**18%**	**21%**	**15%**	**24%**	**17%**	**21%**

Source: Derived from NEMS Household Survey Results (September 2018)
Notes: Figures may not add due to working

5.6.25 The key findings are summarised below:

- The Borough retains over half (between 50-72%) of bulky comparison goods shopping trips in Zones 1-4, but the majority of trips in Zones 5 (Faversham) and 6 (Borough East) take place outside the Borough (56% and 70% respectively).
- Sittingbourne attracts the majority of bulky goods trips in Zones 1-3 (between 52-67%) and is also a key attractor for residents in Zone 4 (Central Borough) (43%).

- Sheerness retains only 16% of trips from the Isle of Sheppey zone (Zone 1) with Sittingbourne being the main attractor of trips from the island.
- Reflecting its limited bulky comparison goods facilities in the town, Faversham retains only 15% of trips from its zone (Zone 5) and has little influence beyond.
- Bluewater Shopping Centre has very little influence on bulky good shopping trips undertaken by residents in the Borough.
- Online shopping accounts for between 15% and 24% of all bulky comparison goods purchases across all zones. Zone 4 has the highest proportion whilst Zone 3 the lowest.

Internet

5.6.26 The NEMS survey results identify that, for certain comparison goods, residents in Swale are proficient at shopping online. The goods most commonly bought online are books, CDs and DVDs (between 49% and 72%). This is followed by small electrical goods (26-47%) and toys, games, bicycles & other sporting or recreational goods (22-59%). As expected, Chemist goods and DIY items are the least common comparison goods to be purchased online, at 2-11% and 2-9% respectively.

5.6.27 For convenience goods, the level of internet shopping is consistent across the zones at between 2% and 5%. As expected, given the nature of a top-up food shop, a low percentage of this is done online.

Figure 5.12 Internet Shopping Market Share

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East
Goods Category	**1**	**2**	**3**	**4**	**5**	**6**
Main Food	2%	4%	5%	3%	2%	3%
Top-up Food	0%	0%	0%	0%	0%	1%
Clothing and Footwear	23%	15%	12%	13%	13%	19%
Books, CDs & DVDs	59%	51%	72%	56%	53%	49%
Furnishings & Household Textile Goods	18%	17%	21%	21%	13%	20%
Small Household Goods	7%	10%	15%	29%	18%	9%
Clocks, Jewellery, Watches	9%	22%	25%	15%	24%	9%
Toys, Games, Bicycles & Others	43%	22%	27%	59%	24%	23%
Chemist Goods	2%	5%	11%	3%	2%	3%
Large Household Electricals	31%	41%	22%	41%	34%	38%
Small Electrical Goods	31%	34%	26%	47%	28%	29%
Furniture, Carpets & Floor Coverings	16%	12%	18%	21%	8%	10%
DIY incl. Gardening Goods	5%	3%	2%	9%	4%	5%

Source: Derived from NEMS Household Survey Results (September 2018)

5.6.28 In terms of how items purchased online are received, Figure 5.13 sets out the proportion that were via home delivery and those by click and collect.

Figure 5.13: Online Purchases Delivery Method

Goods Category	Online Delivery Method (%)		
	Home Delivery	Click and Collect	Downloaded
Main Food	100	0	N/A
Top-up Food	N/A	N/A	N/A
Clothing & Footwear	98	2	N/A
Books, CDs & DVDs	93	1	5
Furnishings & Household Textile Goods	91	9	N/A
Small Household Goods	99	1	N/A
Clocks, Jewellery, Watches	99	0	N/A
Toys, Games, Bicycles & others	99	1	N/A
Chemist Goods	98	0	N/A
Large Household Electricals	98	1	N/A
Small Electrical Goods	95	5	N/A
Furniture, Carpets & Floor Coverings	99	0	N/A
DIY incl. Gardening Goods	100	0	N/A

Source: Derived from NEMS Household Survey Results (September 2018)
Note: Figures may not add up to 100% due to rounding and/or additional answers provided in survey

5.6.29 In summary, the results show that:

- for online convenience goods shopping, all were received via home delivery;
- over 91% of all comparison goods categories were home delivered;
- purchases of furnishings and household textile goods were the most commonly collected from store (9%); and
- roughly 5% of purchases for books, CDs and DVDs were downloaded rather than delivered or collected from store.

5.7 Summary

5.7.1 The above sections set out the existing retail provision within Swale Borough, surrounding competing centres and an assessment of the shopping patterns of residents within the study area. The subsequent sections provide health checks and our qualitative assessment of any retail related deficiencies within each of the centres.

6.0 Qualitative Assessment – Sittingbourne Town Centre Health Check

6.1 Introduction

6.1.1 Following the findings of the household telephone survey and the retail market share patterns, this section provides a detailed qualitative health check assessment of the vitality and viability of Sittingbourne Town Centre to understand the health of the centre and assist in identifying any qualitative needs.

6.2 Vitality and Viability Town Centre Health Check

6.2.1 The following health check assessment is based on the indicators published in the NPPG to assess the vitality and viability of Sittingbourne Town Centre. Details of the criteria within the NPPG and the methodology utilised for the health check is contained at **Appendix B**.

6.2.2 Sittingbourne is the highest tier centre within Swale Borough and is designated as the Main Borough Urban Centre under Local Plan Policy ST3. The adopted Local Plan seeks to make Sittingbourne the primary urban focus for growth with development to support town centre regeneration.

6.2.3 The defined town centre is generally linear in form, following the length of the High Street which transitions into East Street and West Street at each end. To the north, the town centre follows the edge of St Michael's Road and extends to the station before again following St Michael's Road to the junction with West Street and London Road. To the south, the town centre boundary follows the northern edge of the Avenue of Remembrance and then Fairview Road to the junction of East Street and St Michael's Road.

6.2.4 The primary shopping area defined on the adopted proposals map is generally linear in form, encompassing the length of High Street and the Forum Shopping Centre. High Street forms part of a one-way system with the road being narrowed to allow better pedestrian movement. Secondary shopping frontages are located along East and West Streets at either end of High Street, where the road is two-way and pavements are noticeably narrower.

6.2.5 The town centre is currently seeing substantial investment being delivered by The Spirit of Sittingboure. The mixed-use scheme, aiming for completion by early 2020, will deliver a new 8-screen multi-plex screen cinema, six new restaurant units, a 63 bed hotel, 213 residential apartments and a multi-storey car park.

Diversity of Uses & Representation

6.2.6 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings below. A breakdown of the unit numbers in the town centre is shown below in Figure 6.1 and 6.2. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix C**.

6.2.7 It should be noted that Figures 6.1 and 6.2 exclude a number of uses, including health centres, religious institutions and educational institutions (Use Class D1) as well as offices (Use Class B1).

Figure 6.1: Sittingbourne Town Centre Diversity of Use for Commercial Units

	Sittingbourne		UK Average
	No.	%	%
Convenience	26	10	9
Comparison	72	28	30
Retail Service	52	20	15
Leisure Service	55	21	24
Finance & Business Service	25	10	10
Vacant	30	12	11
TOTAL	**260**	**100**	**100**

Figure 6.2: Sittingbourne Town Centre Diversity of Use for Commercial Floorspace

	Sittingbourne		UK Average
	Sqm	%	%
Convenience	11,660	20	15
Comparison	16,410	28	35
Retail Service	6,250	11	7
Leisure Service	16,020	27	25
Finance & Business Service	3,950	7	8
Vacant	4,800	8	10
TOTAL	**59,090**	**100**	**100**

Source: Experian Goad Survey, September 2018
UK average figure is at September 2018 (latest available at time of writing)
Excludes health centres, religious institutions, education institutions and offices
% figures may not add due to rounding

Convenience Goods

6.2.8 Sittingbourne provides a total of 26 convenience goods units with a combined floorspace of 11,660sq m gross. The Sainsbury's Foodstore, located on the Avenue of Remembrance is the largest convenience retailer within the town centre, providing 5,985sqm gross of floorspace. The town centre also benefits from Lidl and Aldi foodstores which provide 1,475 and 1,352 sqm gross of floorspace respectively. Other national convenience retailers in Sittingbourne include Iceland, Bargain Booze, Timpson, Holland & Barrett, and Greggs. Several smaller independent retailers are also present, including a tobacconist, butcher, shoe repair/engraving shop, and newsagents.

6.2.9 Figure 6.1 identifies that the current proportion of convenience goods stores in the town centre is comparable to the UK average. In terms of the proportion of convenience goods floorspace represents 20% of all town centre commercial floorspace, which is above the national average of 15%. This is not surprising given the foodstore provision in the town centre.

Comparison Goods

6.2.10 There are 72 comparison goods units in Sittingbourne, which represents 28% of the total units in the town centre. The proportion of units occupied by comparison goods retailers (28%) is slightly below the UK average (30%). Overall, 16,410 sqm floorspace is provided, equating to 28% of the total floorspace, a much lower proportion than the national average of 35%.

6.2.11 A breakdown of the 72 comparison units shows that 22 provide sporting goods, footwear, clothing or jewellery, 8 are charity shops, while other units include book shops, mobile phone shops, florists, pet shops and discount stores.

6.2.12 There is a reasonable range of national multiple retailers present within Sittingbourne. Clothing retailers include Burton, Bon Marche, Peacocks, The Edinburgh Woollen Mill, New Look, Sports Direct and M&Co. Other national comparison retailers include The Works, Clintons, WH Smith, Boots, Superdrug, Wilko, Game, Savers, CEX Entertainment, Poundland and Poundstretcher. However, of the 31 'major retailers' identified by Experian as key attractors to a town centre, Sittingbourne contains only 10.

6.2.13 Independent retailers occupy 56% (40) of the comparison units. The independent operators cover a broad range of retail type, including pet shops, gift shops, household goods and jewellers, and typically operate from the smaller units within Sittingbourne Town Centre. Overall, the town centre is considered to provide a good range of independent retailers.

Retail Services

6.2.14 The retail service offering in Sittingbourne is strongly represented by hairdressers, beauty salons and tattoo parlours with 31 out of the 52 retail service units (59%) occupied by such uses. In addition to these uses, the town centre offers a post office, dry cleaners, several undertakers, car repair garages and opticians.

6.2.15 The current provision of units in retail service use (20%) is higher than the UK average (15%). In floorspace terms the proportion of floorspace in retail service use (11%) is also higher than the UK average (7%). The retail service provision in the town centre is considered to be healthy.

Leisure Services

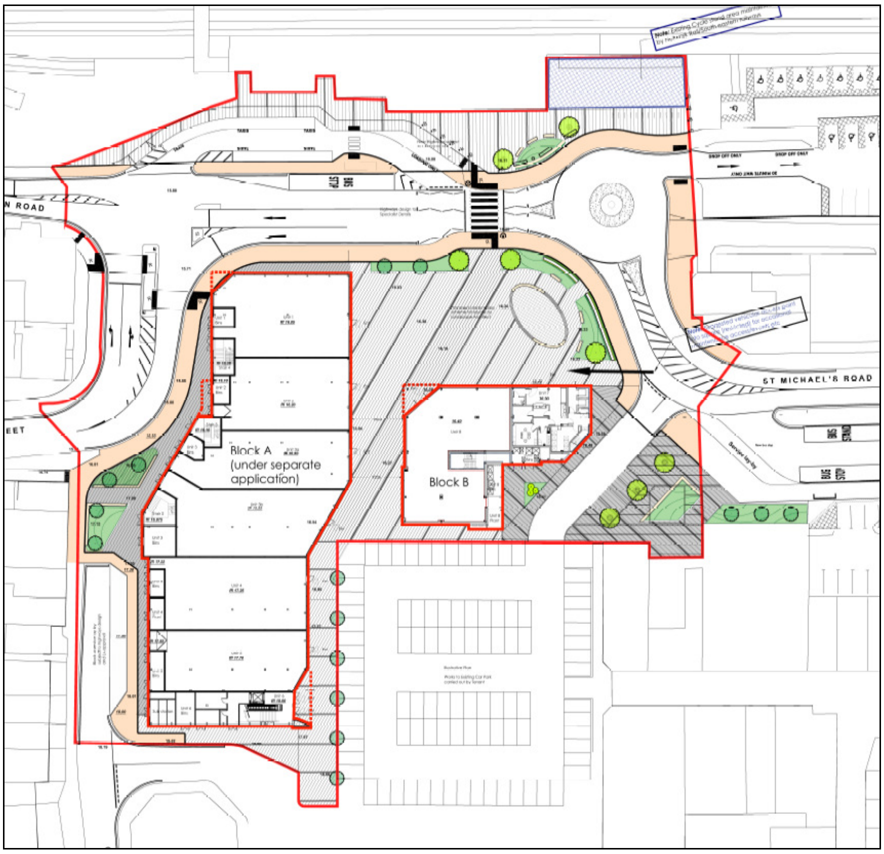
6.2.16 There is some 16,020 sqm of leisure service floorspace within Sittingbourne, which represents 27% of the total floorspace provision in the town centre. This provision is slightly higher (+2%) than the national average of 25%. In unit number terms, leisure services occupy 21% of the units in the town centre, which is lower (-3%) than the national average of 24%. This indicates that the units providing leisure uses are larger on average than those found in other town centres. This is borne out by providers including The Avenue Theatre (1,530 sqm), The Swallows Leisure Centre (3,340 sqm), Mecca Bingo (910 sqm) and The Golden Hope Public House (1,110 sqm) all occupying large premises.

6.2.17 There are 20 fastfood & takeaway operators within Sittingbourne Town Centre, occupying 7.7% of the available units. Whilst the proportion of units in fastfood/takeaway use is slightly higher than the UK average (5.7%) the number of units is not considered to detract from the vitality and viability of the town centre.

6.2.18 The majority of leisure services are provided by independent operators (78%), although national multiple operators include Starbucks, Costa Coffee, JD Wetherspoon and the bookmakers Betfred, William Hill, Coral and Paddy Power.

6.2.19 The leisure services provision in the town centre will be significantly improved following the completion of the mixed use redevelopment scheme to the West of The Forum Centre. The Spirit of Sittingbourne aiming for completion by early 2020, will deliver a new 8-screen multi-plex screen cinema, six new restaurant (including Nando's and Pizza Express) and a 63 bed hotel.

Figure 6.3: Spirit of Sittingbourne Redevelopment Site Plan



Source: Planning Application 16/506081

Financial and Business Services

6.2.20 There are 25 providers of financial and business services within the town centre including 13 estate agencies, 7 banks and building societies, a pawnbroker, accountant, solicitor, employment agency and a business equipment provider.

6.2.21 The proportion of financial and business service units and floorspace is broadly in line with the UK. We do not consider there to be any particular qualitative deficiencies in financial and business service provision in the town centre.

Markets

6.2.22 Sittingbourne Town Centre is also home to several markets, each offering a range of produce. Sittingbourne Market operates every Friday along the High Street and offers a range of everyday goods sold by local traders.

6.2.23 An artisan market operates along the High Street on the second Saturday of every month between 10am – 2pm offering a more specialised range of products from local producers including food and gifts.

6.2.24 A monthly themed market is also held on the fourth Saturday of the Month, again in the High Street from 10am-2pm. Past themes have included 'Food Fest', 'Simply Vinatage' 'Shop Local' and seasonal Christmas Markets.

6.2.25 Overall, the town centre is considered to be reasonably well provided for in terms of markets.

Vacancies

6.2.26 The level of vacancies across the town centre is comparable with the national average. Overall, there are 30 vacant units (12% of the total) occupying 8% of the total floorspace. The national average is presently 11% in terms of vacant units and 10% vacant floorspace.

6.2.27 The vacancies are spread throughout the town centre with no particular concentration, although it is noted that there are 6 vacant units presently within the Forum Shopping Centre, and the two largest vacant units on the High Street are 2 doors apart from each other (The former Argos and Store Twenty One units at 121 and 129 High Street respectively).

Operator Requirements

6.2.28 The 'Requirements List' identifies a total of 6 retail and commercial leisure operators currently seeking premises in the town centre. The operators seeking space in the town are shown in Figure 6.4 below.

Figure 6.4: Operator Requirements for Sittingbourne Town Centre

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Aldi	930	
Monkey Puzzle Day Nurseries	186	558
Age UK	93	650
Leisure – Food & Drink		
Subway	18.5	111
Pizza Hut Delivery	93	
Leisure - Other		
Anytime Fitness	371	743

Source: 'The Requirements List'

Pedestrian Flows

6.2.29 During our surveys, the centre was observed to be reasonably busy. Good levels of activity were observed along the pedestrianised length of High Street particularly at the entrance to the Forum and the junction with central avenue opposite. The eastern and western ends of the high street were observed to have lower levels of pedestrian activity, as was Station Street and Roman Square which leads to the Sainsbury's supermarket on the Avenue of Remembrance.

Accessibility

6.2.30 The accessibility of the centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

6.2.31 Sittingbourne benefits from a main line railway station located to the north of the town centre, approximately a five-minute walk from the High Street. Train services stop here frequently and offer services to London St Pancras, London Victoria, Canterbury and Dover with other stops in between. The connectivity between the High Street and the railway station will be significantly improved following the completion of the Spirit of Sittingbourne leisure quarter redevelopment scheme.

6.2.32 Sittingbourne is well served by bus services with bus services available to Chatham, Maidstone, Sheerness, Faversham and Canterbury. Bus stops are located along St Michael's Road, adjacent to the railway station, on Bell Street, the Avenue of Remembrance and on East and West Streets.

6.2.33 Cycle parking in Sittingbourne is available at several points throughout the town centre. A large number of spaces are provided at the railway station, and other spaces are available outside the Sainsbury's supermarket and at the entrance to the Forum Shopping Centre. At the time of our visits, the cycle parking was not particularly well used.

6.2.34 Sittingbourne is well connected by road with the A2 providing the main link between east and west. The A249 links the west of the town with the Isle of Sheppy and the M2, which runs to the south provides wider connections to further afield.

6.2.35 There are a number car parks within and on the edge of the town centre. These include:

- Albany Road (104 spaces)
- St Michaels Road (126 spaces)
- Swallows Leisure Centre (120 spaces)
- Sainsbury's store (400 spaces)
- Central Avenue (60 spaces)
- Cockleshell Walk (96 spaces)
- Crown Quay Lane (42 spaces)
- The Forum (162 spaces)
- Swallows (86 spaces)
- Swale House (70 spaces (weekends and Bank Holidays only))
- Spring Street (72 spaces)
- Bell Road (24 spaces)

6.2.36 Car parking provision in the town centre will be enhanced following the completion of the Spirit of Sittingbourne 308 multi-storey car park.

6.2.37 It is noted that the NEMS household survey identified that 76% of respondents travel to Sittingbourne via car. However, 8% mentioned more/cheaper parking and 8% improved access/less traffic congestion as measures that would encourage them to visit the town centre more often.

Perception of Safety

6.2.38 Sittingbourne Town Centre benefits from a CCTV network with good coverage of the High Street, car parks and the railway station. The network monitors the town centre, helping to cut down on crime and traffic offences.

6.2.39 A search of local crime statistics identified that 113 crimes were committed within a mile of the town centre in July 2018. Of these crimes, 90 were recorded as anti-social behavioural offences and 14 as violent and/or sexual offences. The most common areas where crimes were committed were at Sittingbourne Railway station (9 crimes) and on or near West Street (5 crimes).

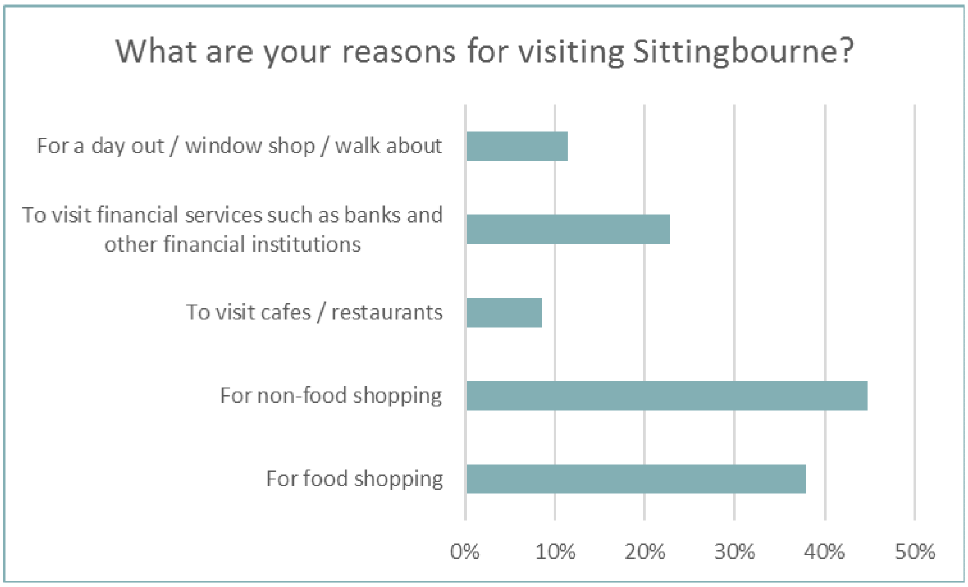
6.2.40 It is noted that respondents from the NEMS household survey did not raise any particular issues with safety/security in the town centre which supports our own views that the town centre generally felt safe during our visit in daylight hours.

Views and Behaviours

6.2.41 Using the household survey we have been able to obtain information on the main reasons why respondents visit Sittingbourne Town Centre, what they like about it and what, if anything, would encourage them to visit the centre more often.

6.2.42 Figure 6.5 below identifies that the main reasons why respondents visit the town centre is for non-food shopping (45%) and for food shopping (38%). After this, 23% identified visiting financial services as the main reason for visiting. 11% of respondents identified vising the town centre for a day out as their main reason and 9% identified visiting cafes and restaurants and the main reason for visiting.

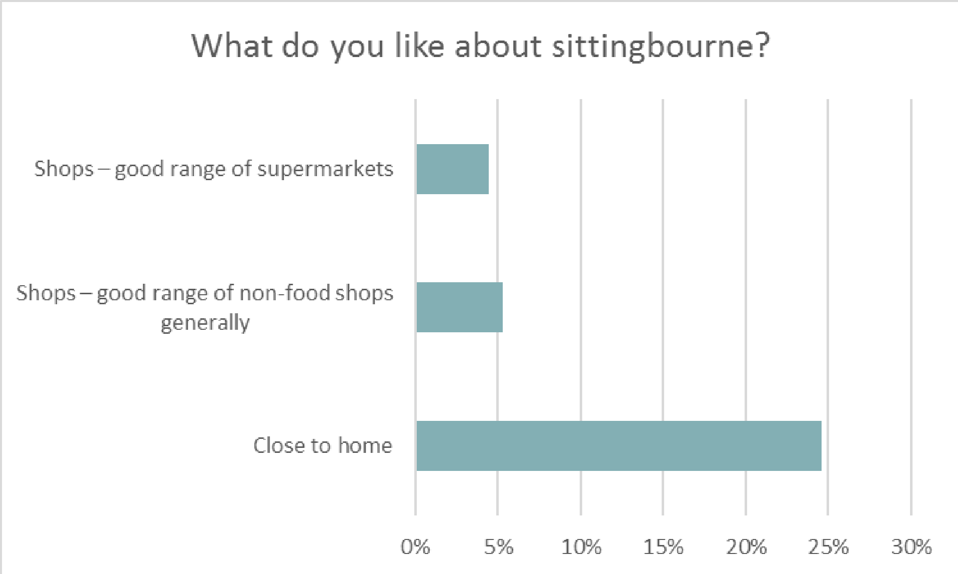
Figure 6.5: Main reason for visiting Sittingbourne Town Centre



Source: Q34a and 34b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

6.2.43 When asked what they liked about Sittingbourne, 25% of respondents cited its location close to home as the main reason. The range of non-food shops (5%) and supermarkets (4%) were also given as reasons.

Figure 6.6: Main likes about Sittingbourne Town Centre



Source: Q35a and 35b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

6.2.44 When asked what measures would encourage them to visit Sittingbourne Town Centre more often, 19% cited more 'high street' retailers as a key measure. 12% of respondents said that more/better clothes shops would encourage more frequent visits, 10% said that more/better cafes or restaurants would and 9% said that more or a better range of non-food shops in general would encourage them to visit more often. Of all the responses however, 27% of people asked indicated that nothing would encourage them to visit the centre more regularly.

Figure 6.7: Measures that would encourage visits to Sittingbourne Town Centre more often

Source: Q36a and 36b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

Town Centre Environmental Quality

6.2.45 Generally, the environmental quality of the town centre is considered to be reasonable. However, overall, the public realm would benefit from improvement/modernisation with higher quality materials and landscaping.

6.2.46 At the time of our visits we did not observe much litter or graffiti and in general shopfronts are reasonably well maintained. Some shopfronts however, particularly those that are vacant or on secondary frontages are in need of improvement and detract from the appearance of the town.

6.2.47 The frontage of Wilko onto Station Road is presently a blank wall and appears somewhat oppressive when viewed from the other side of the road. Similarly, the frontage of the Lidl store onto West Street is blank and any improvements to this façade would be beneficial to this area of the town centre.

6.2.48 There are several attractive historical buildings in the town centre including St Michael's Church and the Covenant Love Chapel and the recent conversion of the old police station to a JD Wetherspoon Pub has been well realised. Some street furniture is provided in the town centre, particularly along the High Street between Station Street and Central Avenue where seating, planting and several trees contribute to the environmental quality of the centre.

6.2.49 Through traffic at either end of the High Street restricts pedestrian flows and there are limited crossing points provided in these areas.

6.3 Summary

6.3.1 Overall, Sittingbourne Town Centre is considered to display reasonable levels of vitality and viability. In particular, there is evidence of significant investor confidence in the town centre (Spirit of Sittingbourne redevelopment). Vacancies are broadly in line with the UK average with accessibility and car parking considered to be reasonable. Convenience goods retail provision is well represented whilst the comparison goods retail provision would benefit from improvement to assist in reducing the level of residents travelling to retail locations outside the Borough. More high street retailers/shops and restaurants were raised as measures to improve frequency of visits to the town centre. The environmental quality of the centre is considered to be reasonable but would benefit from improvements to public realm and landscaping.

7.0 Qualitative Assessment - Faversham Town Centre Health Check

7.1 Introduction

7.1.1 This section of the study contains the qualitative health check assessment of the vitality and viability of Faversham Town Centre to understand the health of the centre and assist in identifying any qualitative retail needs.

7.2 Vitality and Viability Town Centre Health Check

7.2.1 As per Sittingbourne, the health check assessment is based on the indicators published in NPPG to assess the vitality and viability of Faversham Town Centre. **Appendix B** contains the details of the methodology.

7.2.2 Faversham is located in the eastern part of Swale Borough, between Sittingbourne and Canterbury to the north of the A2. The town is currently designated along with Sheerness as a second-tier settlement under Policy ST2 of the adopted Local Plan.

7.2.3 Faversham Town Centre is relatively compact in nature with the primary shopping area extending around Market Street/West Street, Court Street and Preston Street, with the focal point being the historic Market Place. The southern end of Preston Street and the western extent of West street form secondary shopping frontages.

Diversity of Uses & Representation

7.2.4 The retail composition of the town centre by unit number and floorspace terms is provided in Figure 7.1 and 7.2 below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix D**.

Figure 7.1 Faversham Town Centre Diversity of Use for Commercial Units

	Faversham		UK Average
	No.	%	%
Convenience	18	10	9
Comparison	62	33	30
Retail Service	33	17	15
Leisure Service	42	22	24
Finance & Business Service	19	10	10
Vacant	15	8	11
TOTAL	**189**	**100**	**100**

Figure 7.2: Faversham Town Centre - Diversity of Use for Commercial Floorspace

	Faversham		UK Average
	Sq m	%	%
Convenience	7,430	21	15
Comparison	10,710	30	35
Retail Service	3,250	9	7
Leisure Service	8,650	24	25
Finance & Business Service	2,500	7	8
Vacant	3,270	9	10
TOTAL	**35,810**	**100**	**100**

Source: Experian Goad Survey, September 2018. UK Average is September 2018.
Notes: Figures may not add up due to rounding.
Excludes health centres, religious institutions, education institutions and offices

Convenience Goods

7.2.5 There are 18 convenience retailers within Faversham Town Centre which occupy 21% of the total floorspace (7,430 sqm), 5% higher than the national average.

7.2.6 The Tesco store on Crescent Road is the largest food retailer in the town centre providing some 4,756sq m of convenience floorspace, while the Morrisons store on North Lane, just outside of the designated town centre boundary, extends to 6,739sq m. These two large stores are supplemented by a smaller Iceland store (402sqm) and several other bakers, butchers and convenience stores. Aside from Tesco, Morrisons and Iceland, the McColl's convenience store is the only other national multiple, the rest of the convenience providers in the town centre are independent operators.

7.2.7 Additional local convenience provision is available at the Charter Market held around the Guildhall in the Market Place and along Court Street every Tuesday, Friday and Saturday. Fresh fruit and vegetables are sold, alongside other fresh bakery goods, cheese, fresh flowers and plants. Another market, The Best of Faversham Arts, Crafts and Food Market is held in Preston Street on the first and third Saturday of each month.

7.2.8 Overall, there is not considered to be any qualitative deficiencies in convenience goods provision in the town centre.

Comparison Goods

7.2.9 The town centre accommodates 62 comparison goods retailers. The proportion of units occupied by comparison goods retailers (33%) is slightly higher than the national average (30%), however, the proportion of floorspace occupied by comparison goods retailers is lower (30% compared to 35%). This suggests that the size of the units in the town centre are generally smaller than in other town centres. Indeed, it is noted that M&Co and the Multi Save store are the only comparison goods retailers to provide more than 500 sqm gross floorspace (1,180sq m and 850 sqm gross respectively).

7.2.10 In terms of the range of comparison goods in the town centre, there are 13 furniture, hardware and household goods shops, 9 clothing/fashion, accessories and jewellery retailer, 8 charity shops, 6 health & beauty/chemists, 5 booksellers and art dealers, and 5 antiques and second-hand shops. Other retailers include a cycle / cycle repair shop, toyshop, and stationers.

7.2.11 It is notable that there are only 11 national multiple retailers in the town centre, roughly 18% of the total comparison provision. These retailers include M&Co clothing, Card Factory, Specsavers and 6 national charity shops. Only 2 (Boots and Superdrug) of the key attractors identified by Experian are present in the town centre.

7.2.12 The limited number of multiple retailers present in the town centre is likely to be due, in part, to the relatively small sized units available in the town centre.

Retail Services

7.2.13 The proportion of retail service units (17%) is slightly above the UK average (15%). The town centre currently provides some 33 retail service units. The proportion of floorspace in retail service use (9%) is also slightly above the UK average (7%).

7.2.14 Retail services are heavily represented by health & beauty facilities, with 19 (59%) of the 33 units occupied by such uses. In addition to these, the centre offers opticians, vehicle repair garages, a travel agent, petrol filling station (operated by Tesco and adjacent to their foodstore), a post office, dry cleaning firm and a wedding services provider.

7.2.15 The overall level and offer of retail service provision in the town centre is considered to be reasonable.

Leisure Services

7.2.16 The leisure services available within the town centre consist of 42 units including 26 cafes, restaurants and takeaway establishments, of which all but the Domino’s Pizza and Ask Italian restaurant are independently operated.

7.2.17 Other leisure uses present include 10 public houses or bars, 2 betting offices and an amusement arcade. Again all of these are independently operated except for the betting offices run by Jennings Bet and Coral. In addition to these, an independently owned and run single screen cinema, The Royal, is located on Market Place.

7.2.18 Faversham Pools Leisure Centre and The Arden Theatre are located just outside of the designated town centre boundary on Cross Lane but are included within the GOAD survey.

7.2.19 In unit and floorspace terms, the current leisure service provision within the town centre is slightly lower than the national averages. In floorspace terms 24% is occupied by leisure services (compared to a UK average of 25%) and in unit terms, 22% are occupied by leisure services (compared to UK average of 24%).

Financial & Business Services

7.2.20 For its size, the town centre provides a reasonable range of financial and business providers including 8 estate agencies, 4 banks and building societies (Natwest, Lloyds, Barclays, Nationwide), 2 solicitors, a financial advisor, accountants office, employment agency, stonemason and a locksmith.

7.2.21 The financial and business services provision in the town centre is comparable with the national average indicating that Faversham contains a reasonable choice of services.

Vacancies

7.2.22 The town centre benefits from a vacancy rate which is below the national average in both floorspace and unit terms. At the time of the GOAD survey, 15 units, totalling 3,270sq m gross floorspace, were recorded as being vacant.

7.2.23 The vacant units vary in size with the largest being the former Chinese restaurant on Preston Street, which extends to 880 sqm. The majority of the vacant units are however small ranging between 60-150 sqm. The units are interspersed across the centre, with 6 units along Preston Street, 4 on West Street, 2 on Court Street, and 1 each on Queens Parade and Market Place.

Operator Requirements

7.2.24 The 'Requirements List' identifies a total of 9 retail and commercial leisure operators currently seeking premises in the town centre. These are shown within Figure 7.3 below.

Figure 7.3: Operator Requirements for Faversham Town Centre

Name	Min Size (sq m)	Max Size (sq m)
Retail/Services		
Savers	140	280
Vets4Pets	140	186
Aldi	930	
Lidl	930	3,716
Finch House Bakery	167	325
Leisure – Food & Drink		
Subway	18.5	111
KFC	168	280
Leisure - Other		
Snap Fitness	370	930
Anytime Fitness	370	740

Source: 'The Requirements List'

Pedestrian Flows

7.2.25 Pedestrian activity was monitored during our surveys of the centre. The centre was considered to be reasonably busy with high levels of footfall observed around Market Place, Market Street and Court Street. Good levels of pedestrian activity was also observed along Preston Street with lower levels observed on West Street, Preston Street, and East Street. On the days of our visit the outdoor market was operating - the market was observed to be busy and contributed to the pedestrian activity in the town centre.

7.2.26 It was noted that, at the time of our visit, there was a reasonable level of pedestrian linkage between the two main foodstores (Morrison's and Tesco stores) and the other shops in the town centre.

Accessibility

7.2.27 Faversham Town Centre is easily accessible by public transport and is served by a railway station located at the southern end of Preston Street. The station provides mainline services to London and Dover, with stops in between. Bus services connect Faversham with Canterbury, Maidstone, Ashford, Sittingbourne and other towns in Kent with bus stops located outside the railway station, Crescent Road, Newton Road, Preston Road and South Road.

7.2.28 The town centre benefits from being mostly pedestrianised which significantly assists pedestrian movement within the centre. The NEMS household survey highlights that a large proportion (37%) of respondents who visit Faversham Town Centre do so on foot. Overall, pedestrian accessibility is considered to be very good with the town centre being accessible from the immediate surrounding residential areas.

7.2.29 The town centre benefits from good accessibility by car, being accessed off the A2 and a short distance from the M2 (Junction 7). Car parking provision in the town centre is provided primarily at the following locations:

- Central Car Park, off Leslie Smith Drive (219 spaces);
- Tesco, Crescent Road (250 spaces);
- Morrisons, North Lane (110 spaces);
- Queens Hall Car Park located near to the station (140 spaces);
- Partridge Lane (55 spaces); and
- Institute Road (47 spaces).

7.2.30 The NEMS Household survey identified that some 58% of respondents who visited Faversham Town Centre travel by car. Only 4% of respondents stated that making more parking spaces available would encourage them to visit the town centre more often. A further 4% cited that cheaper/free parking would make them visit the centre more often. The survey results suggest that residents who visit the town centre are generally satisfied with existing car parking.

Perception of Safety

7.2.31 Our visits to the centre suggested that Faversham has a good sense of safety with strong natural surveillance. A good network of CCTV cameras is provided within Faversham which assists in reducing crime related incidents.

7.2.32 Crime statistics show that there were 62 crimes recorded in the area around Faversham Town Centre in July 2018, 37 (60%) of these were associated with anti-social behaviour and 12 (19%) for public order offences. Faversham Station, with 13 crimes reported, was the most common location for crimes to be committed. Leslie Smith Drive, located just off the Primary Shopping Area was the next most common location with 5 crimes.

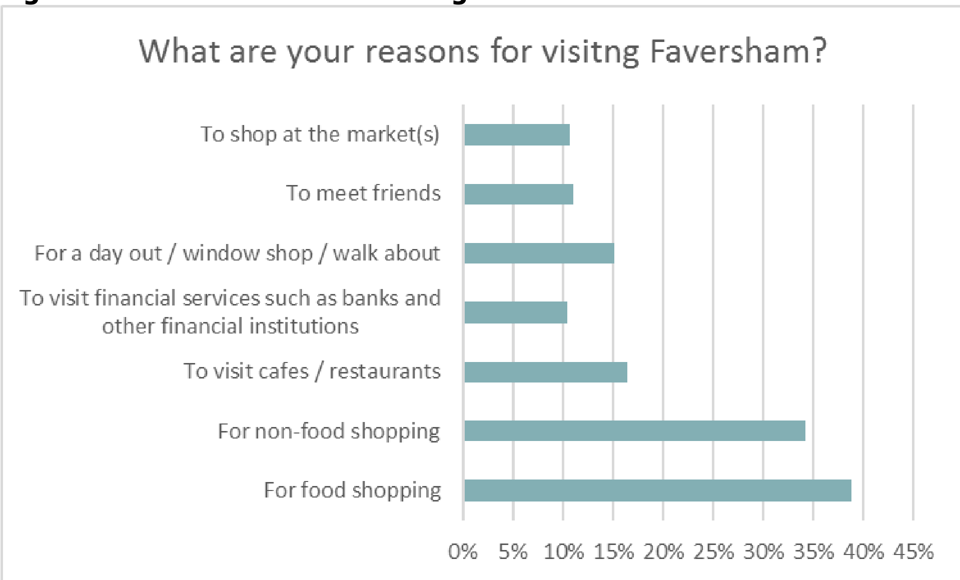
7.2.33 In terms of the residents' perception of safety within Faversham Town Centre, the NEMS household survey identified that no respondents raised better security/safety measures as a reason that would encourage them to visit the town centre more often. The survey suggests that users of the town centre generally feel safe.

Views and Behaviours

7.2.34 We have utilised the household survey to obtain the main reasons why respondents visit Faversham Town Centre, what they like about it and what, if anything, would encourage them to visit the centre more often.

7.2.35 Figure 7.4 below identifies that the main reasons why people visit Faversham Town Centre is for food shopping (39% of respondents) and for non-food shopping (34%). Other reasons for visiting include going to cafes and restaurants (16%), for a day out (15%) to meet friends (11%) and to shop at the markets (11%).

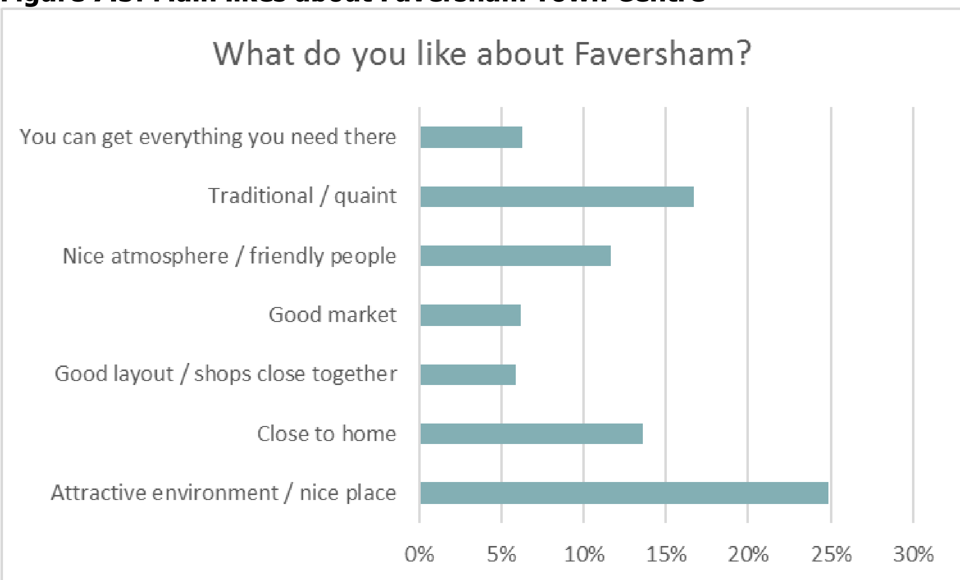
Figure 7.4: Main reason for visiting Faversham Town Centre



Source: Q34a and 34b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

7.2.36 In terms of what they liked most about Faversham, 25% of respondents said its attractive environment, 17% of people liked it as it is traditional / quaint. Other responses indicated that 14% of respondents liked the fact that the town centre is close to home, whilst 12% like the nice atmosphere and friendly people.

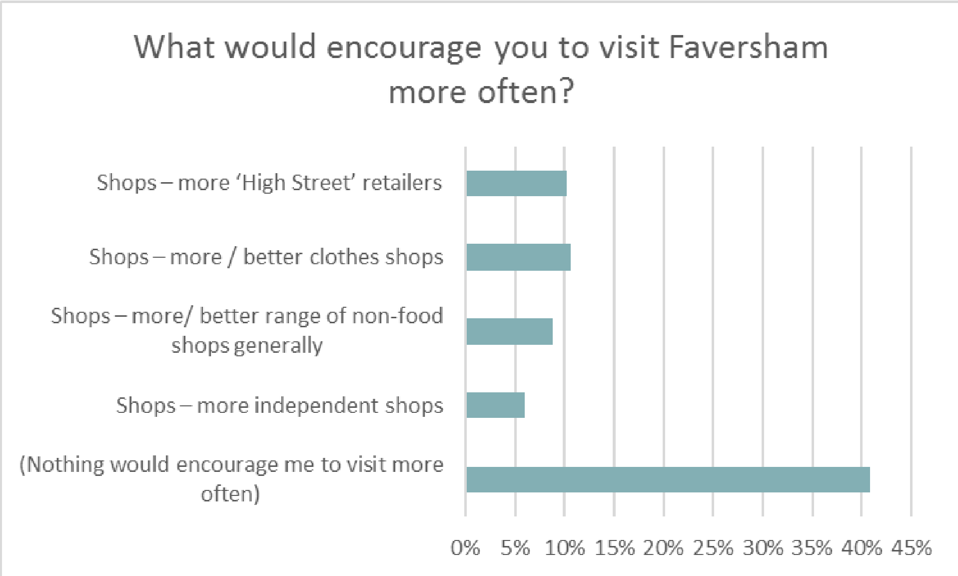
Figure 7.5: Main likes about Faversham Town Centre



Source: Q35a and 35b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

7.2.37 When asked what would make respondents visit Faversham more often, 41% of respondents indicated that nothing would. The next most common answers were more/better clothes shops (11% of respondents), more 'high-street' retailers (10%) and more/a better range of non-food shops (9%), 6% of respondents indicated that more independent shops would encourage them to visit Faversham Centre more frequently.

Figure 7.6: Measures that would encourage visits to Faversham Town Centre more often



Source: Q36a and 36b (1st and 2nd mention combined), NEMS Household Survey (September 2018)

Town centre Environmental Quality

7.2.38 Overall, the environmental quality of Faversham Town Centre is considered to generally be very good. The centre benefits from many historic buildings of high-architectural quality that are well preserved. The entire town centre is covered by the Faversham Conservation Area and a high number of buildings, particularly along the main shopping streets, are listed. Shop fronts are generally of good quality, many retaining historic frontages. The environmental quality of Preston Street is of a poorer quality where a number of shop fronts and paving would benefit from improvement.

7.2.39 The centre was generally very clean and tidy, although some litter was noted towards the southern end of Preston Street, towards the station.

7.3 Summary

7.3.1 Overall, Faversham Town Centre is considered to display good levels of vitality and viability: convenience goods retail provision is well represented albeit comparison goods retail provision is limited; the market significantly contributes to town centre vitality and viability; accessibility and car parking in the town centre is considered to be good; vacancy levels are below the national average; and the town centre is attractive with a good standard of environmental quality.

8.0 Qualitative Assessment - Sheerness Town Centre Health Check

8.1 Introduction

8.1.1 Our qualitative health check assessment of the vitality and viability of Sheerness Town Centre is undertaken below. The health check assessment considers the vitality and viability of the town centre in line with the indictors published within the NPPG, following the same methodology undertaken for Sittingbourne and Faversham (detailed at **Appendix B**).

8.2 Vitality and Viability Town Centre Health Check

8.2.1 Sheerness is a coastal town located in the northern eastern part of the Isle of Sheppey. Alongside Faversham, the town is a second-tier settlement defined as an 'Other Borough Centre' within Policy ST2. The town is located at the northern end of the A249 which provides a connection to M2 and further south.

8.2.2 The town centre itself is primarily arranged around a traditional linear high street. The town centre encompasses a large Tesco Superstore located off Bridge Road to the north west, extending to the junction of the Broadway and Fonblanque Road to the east, and south to the Queens Head public house on High Street.

8.2.3 The central focal point of the main shopping area is the square forming the junction of Broadway and the High Street where there is a large clocktower. The defined Primary Shopping Area extends north and south along High Street from here. Small roads leading off High Street form secondary frontages.

Diversity of Uses & Representation

8.2.4 A review of the diversity of retail and service uses accommodated in the town centre has been undertaken and our findings are detailed below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix E**. A breakdown of the unit numbers in the town centre is shown below in Figure 8.1 and 8.2.

8.2.5 Overall, Sheerness Town Centre provides some 225 retail and leisure units, accommodating 41,600 sqm of floorspace.

Figure 8.1 – Sheerness Town Centre - Diversity of Use for Commercial Units

	Sheerness		UK Average
	No.	%	%
Convenience	23	10	9
Comparison	66	29	30
Retail Service	43	19	15
Leisure Service	52	23	24
Finance & Business Service	19	8	10
Vacant	22	10	11
TOTAL	**225**	**100**	**100**

Figure 8.2 – Sheerness Town Centre - Diversity of Use for Commercial Floorspace

	Sheerness		UK Average
	Sq m	%	%
Convenience	11,120	27	15
Comparison	10,450	25	35
Retail Service	4,900	12	7
Leisure Service	9,290	22	25
Finance & Business Service	2,940	7	8
Vacant	2,900	7	10
TOTAL	**41,600**	**100**	**100**

Source: Experian Goad Survey, September 2018. UK Average is September 2018.
Notes: Figures may not add up due to rounding.
Excludes health centres, religious institutions, education institutions and offices

Convenience Goods

8.2.6 The proportion of convenience retail units within the town centre (10%) is broadly in line with the UK average (9%). However, primarily as a result of the Tesco Extra store, in floorspace terms convenience goods provision (27%) is significantly higher than the UK average (15%).

8.2.7 The convenience offer in the town centre is anchored by the large Tesco Extra store which provides some 6,780sq m gross floorspace, approximately 61% of the total convenience floorspace within the town centre. Aldi (1,170sq m), Iceland (560sq m) and Co-Op (440sq m) are also represented in the town centre.

8.2.8 The convenience goods sector also includes several independent retailers including a baker, greengrocer, off-licence, 3 Confectionary Tobacco and News stores and a butcher. National multiple retailers in addition to Tesco, Aldi, Iceland and Co-op include Greggs and Holland & Barrett.

8.2.9 Overall, the convenience goods provision in the town centre is considered to be good.

Comparison Goods

8.2.10 Sheerness Town Centre's comparison goods offer is provided in 66 units which represents 29% of the total number of units in the town centre. Whilst the proportion of comparison goods units is broadly in line with the UK average the proportion of floorspace occupied by comparison goods retailers (25%) is significantly lower than the UK average (35%). Similar to Faversham, for its size Sheerness provides a reasonable number of comparison goods units albeit they are generally restricted in their size.

8.2.11 Of the 66 comparison goods units, 12 offer clothing and footwear including national retailers such as Peacocks, Bon Marche, Shoe Zone and New Look, and several independents. Other national comparison goods retailers include Superdrug, Savers, Boots, Poundstretcher, H Samuel and Oxfam, RSPCA, and Red Cross and Scope charity shops.

8.2.12 The town centre contains only 4 of the 31 'major retailers' which Experian consider to be key attractors, and therefore most likely to improve the attraction of the centre for consumers. The 4 retailers are Boots, Superdrug, New Look and Tesco. Whilst some of the other major retailers listed by Experian are department stores, including John Lewis and House of Fraser, which we consider too large for Sheerness to accommodate, there is a notable absence of other major retailers within Sheerness such as Burton, W H Smith, Wilko, and Carphone Warehouse.

8.2.13 The town centre provides a good number of independent retailers, with the current proportion of units representing 77% (51) of the total comparison goods units. The independent operators cover a diverse range of shop types, including furniture and homeware retailers, household goods, jewellers and pet shops. Most of these units are small and all are less than 140sq m in size.

8.2.14 Overall, Sheerness Town Centre's comparison goods retail offer is reasonably limited. The reasonably limited influence of comparison goods provision in the town centre is reflected in the results of the household survey which show that the town centre only retains a quarter of comparison goods trips from the Island.

Retail Services

8.2.15 There is a higher proportion of retail service units and floorspace within Sheerness in comparison to the national average. The town centre provides 43 units (19%), within 4,900 sq m gross floorspace (12%).

8.2.16 Whilst we consider that there is a reasonable range of retail services in the town centre, a relatively high proportion of these units (28 (65%)) are beauty salons, tattoo parlours, hairdressers or barber shops. Other services available include travel agents, opticians, 2 petrol filling stations, a post office, dog grooming parlour and funeral services.

Financial and Business Services

8.2.17 Sheerness Town Centre provides a reasonable range of financial and business services including 5 banks/building societies (TSB, Halifax, Natwest, Barclays and Nationwide), 9 estate agencies, a pawnbroker, recruitment agency, building contractor, an accountant and solicitor.

8.2.18 Overall, 19 units provide financial and business services with a total area of 2,940sq m representing 8% of the total units and 7% of the floorspace in the centre. The offer is broadly comparable with the national averages.

Leisure Services

8.2.19 The leisure service offering in Sheerness Town Centre consists of 52 units and includes cafes, fast food, takeaway outlets, and public houses. Other leisure services include betting offices, a bowling alley, bingo hall, an amusement arcade, a hotel and a social club.

8.2.20 Almost three quarters of leisure services are provided by independent operators (74%) with the only national operators being McDonald's, Subway, Domino's Pizza, bookmakers William Hill, Betfred and Ladbrokes. William Hill operate 2 betting shops within the town centre.

8.2.21 In unit and floorspace terms, the current leisure provision in the town centre is slightly below the national average (23% compared to 24% for unit provision, and 22% compared to 25% for floorspace). It is notable that there are only 3 restaurants within Sheerness, equating to 1.3% of units, well below the national average of 4.7%. In contrast, the proportion of fast food & takeaway units within the town centre (8%) is above the national average of 6% and the proportion of cafes (4%) is in line with the national average.

8.2.22 The leisure offer in the town centre is complemented by additional leisure services nearby and along the sea front. Sheppey Leisure complex is less than 300m walk from the High Street and provides a range of sports facilities, a gym and a swimming pool. Other nearby facilities include a skate park and outdoor play areas.

Vacancies

8.2.23 22 units were recorded as being vacant within the town centre at the time of the survey. The units are small in size, all measuring less than 280sq m gross. The largest vacant unit within the town centre is to the rear of the Poundstretcher unit off Hope Street (550sq m gross). On the whole, vacancies are dispersed throughout the centre although there is small concentration in the vicinity of the clocktower.

8.2.24 The proportion of units vacant within the town centre (10%) is slightly below the UK average (11%). In floorspace terms, the proportionate of vacant units (7%) is below the UK average (10%).

8.2.25 Vacancies in the town centre were not considered to notably detract from the vitality and viability of the centre. We note however 6% of respondents in the NEMS survey expressed that less empty shops would encourage them to visit the centre more often.

Operator Requirements

8.2.26 The 'Requirements List' identifies only 3 retail and commercial leisure operators currently seeking premises in the town centre, indicating a relatively low level of demand from operators seeking representation. The retailers are shown within Figure 8.3 below.

Figure 8.3: Retailer Requirements for Sheerness Town Centre

Name	Min Size (sq. m)	Max Size (sq. m)
Retail/Services		
Age UK	93	650
Vets4Pets	140	186
Leisure - Other		
Anytime Fitness	370	740

Source: 'The Requirements List'

Pedestrian Flows

8.2.27 At the time of our visits pedestrian activity within the centre was monitored to be moderate in the main shopping areas with footfall observed to be highest on High Street in vicinity of the clocktower. Reasonable levels of footfall was also monitored at the northern end of the High Street with lower levels observed at the southern end of the High Street to the South of Trinity Way and eastern part of Broadway.

8.2.28 High levels of footfall were noted at The Tesco Extra store with some linkage taking place between the foodstore and the rest of the town centre.

Accessibility

8.2.29 Given its location in the north western part of the Isle of Sheppey and the location of Sittingbourne on the mainland, Sheerness's retail and commercial leisure catchment is restricted. It's accessibility by road to the wider catchment area is therefore restricted and is generally considered to be poor.

8.2.30 The town centre benefits from a railway station located at the northern end of High Street. Train services to and from Sittingbourne operate from the station, providing connections to London and the rest of Kent. Bus services which serve Sheppey stop outside the railway station and busses to wider destinations such as Sittingbourne, Maidstone and Canterbury also stop at the town centre.

8.2.31 For its size there is a reasonable range of car parks as well a reasonable level of short-stay on-street parking available. The Tesco car park is the largest in Sheerness, providing 650 spaces, although parking is time limited. Pay and display parking include car parks at:

- Beachfields (76 spaces);
- Bridge Road (47 spaces);
- Beach Street (94 spaces);
- Cross Street (76 spaces);
- Rose Street (169 spaces);
- Trinity Place (57 spaces); and
- Trinity Road (60 spaces.

8.2.32 The NEMS survey suggests that on the whole residents are not concerned with the level of parking provision in, and accessibility to, the town centre.

Perception of Safety

8.2.33 The main shopping areas of Sheerness generally felt safe with a good level of natural surveillance. The Council's website indicates that 14 CCTV cameras are located across Sheerness Town Centre, providing a good network of coverage.

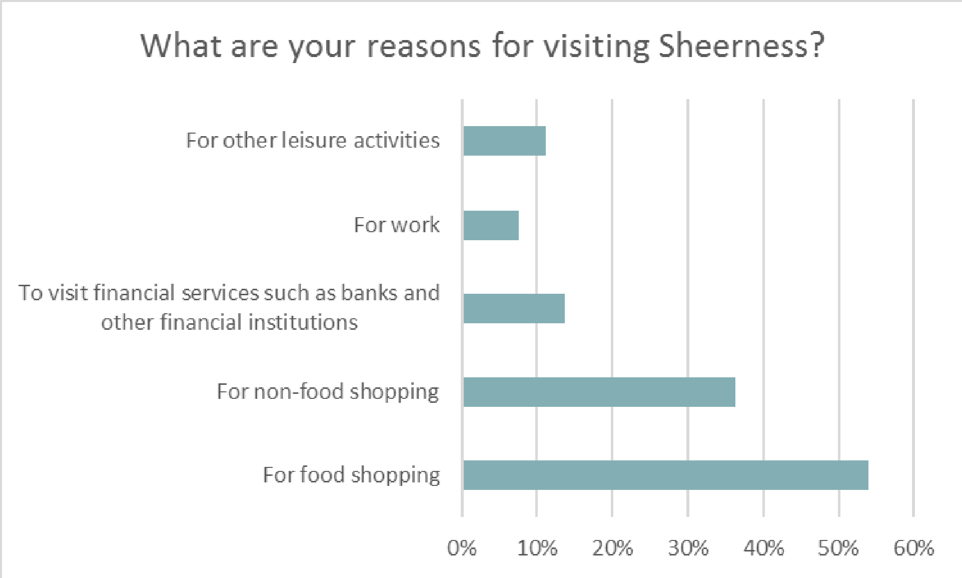
8.2.34 Published crime statistics show that 59 crimes were recorded in and around Sheerness Town Centre in July 2018. The majority of these crimes (45 instances) were anti-social behaviour offences, with a spread across the town centre rather than a single location.

8.2.35 5% of respondents in the NEMS Survey who visited Sheerness Town Centre mentioned better security/safety as a measure that would encourage them to visit the town centre more often. Whilst this is a relatively low percentage and suggests no particular overall concern by the majority of respondents, when compared to the other two towns in the Borough it is noted that no respondents indicated security/safety as a concern/measure.

Views and Behaviours

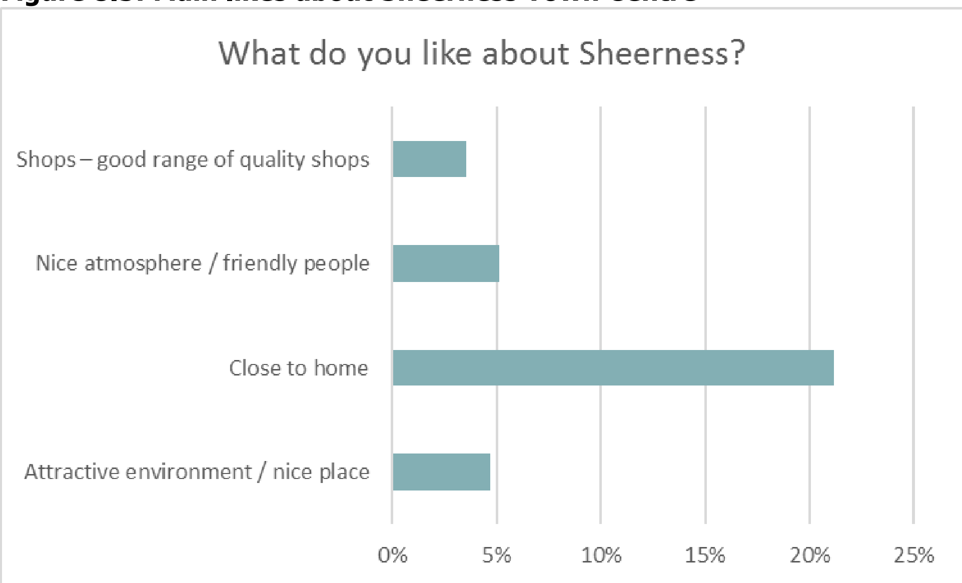
8.2.36 When asked why respondents visit Sheerness Town Centre, food shopping was the most common answer, with 54% citing this as a reason for visiting. 36% of respondents visit for non-food shopping and 14% of respondents travel to Sheerness to visit financial services.

Figure 8.4: Main reason for visiting Sheerness Town Centre



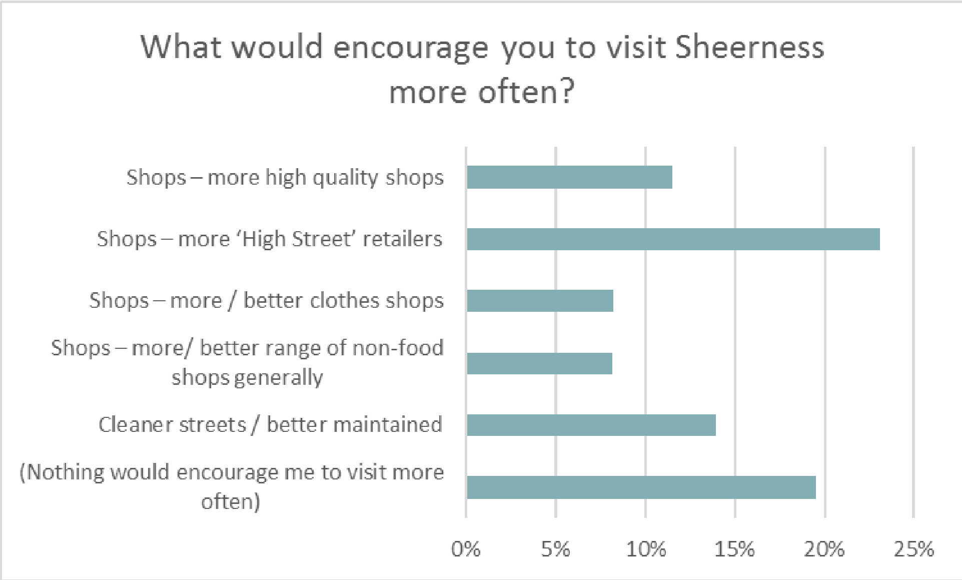
8.2.37 When asked what they liked about Sheerness, 21% of respondents like the fact it was close to their home, 5% liked the attractive environment and 5% liked the nice atmosphere / friendly people. Slightly fewer people (4%) responded that the good range of shops was what they liked about Sheerness.

Figure 8.5: Main likes about Sheerness Town Centre



8.2.38 More 'high-street' retailers was the most common response when people were asked what would encourage them to visit Sheerness more often (23% of respondents). Other common responses were that people would visit more frequently if Sheerness had cleaner streets / was better maintained (14% of respondents), if Sheerness had more high quality shops (12%) and if there was a better range of non-food shops or more/better clothes shops (8% each). 20% of respondents said that nothing would encourage them to visit Sheerness more often than they did.

Figure 8.6: Measures that would encourage visits to Sheerness Town Centre more often



Town Centre Environmental Quality

8.2.39 The main shopping area is considered to be demonstrate reasonable levels of environmental quality with a number of attractive historical buildings providing a varied street scene. However, it was noted that several shopfronts appeared in need of maintenance whilst temporary signage or unsympathetic shopfront modifications detracted from the appearance of other units.

8.2.40 The through traffic along High Street together with on-street parking are considered to mar the environmental quality of the centre. The relatively narrow pavements in the centre emphasis/prioritises vehicular traffic also. The pedestrianisation of part of the High Street and improvement in public realm would significantly enhance the environmental quality and attractiveness of the town centre and, if not already considered, should be considered in consultation with key stakeholders, traders and residents as part of the strategy for the town centre.

8.3 Summary

8.3.1 Overall, Sheerness Town Centre is considered to display reasonable levels of vitality and viability. The centre's convenience goods provision is good, it contains a low vacancy level and the centre is generally considered to be safe. However, it's environmental quality would benefit from enhancement and the comparison goods provision, albeit reasonable for its size and catchment, would also benefit from improvement.

9.0 Qualitative Assessment – Local Centres

9.1 Introduction

9.1.1 This section of the study set out the qualitative health check assessments of the vitality and viability of local centres in the Borough to understand their health and role in the hierarchy.

9.2 Summary of Local Centre Health Checks

9.1.2 Vitality and viability health check assessments for the 11 local centres are provided at **Appendix F**. Given the nature and scale of these centres, there is limited published information and our analysis therefore draws largely on data from own site visits carried out in September 2018.

9.1.3 Figure 9.1 below sets out the composition of the local centres in terms of the number of units by retail/leisure category.

Figure 9.1: Local Centre Unit Composition (No.)

Local Centre	Conv (Food)	Comp (Non-Food)	Retail Service	Leisure Service	Finance Service	Other	Vacant	Total
Queenborough	2	1	2	7	0	2	0	14
Rushenden	1	0	0	0	0	0	0	1
Minster	3	3	1	3	0	3	0	13
Halfway Houses	2	11	2	13	1	2	1	32
Eastchurch	2	1	2	2	0	1	1	9
Leysdown	2	8	1	16	1	1	1	30
Iwade	1	1	1	2	0	1	0	6
Newington	1	1	0	3	3	0	2	10
Milton Regis	1	8	7	7	0	4	3	30
Teynham	2	8	4	5	1	4	1	24
Boughton	1	0	2	3	0	0	1	7

Source: Appendix F

9.1.4 Figure 9.1 shows that the largest local centres, in terms of number of units, is Halfway Houses (32 units) and Leysdown (46 units). Both centres provide a larger proportion of comparison goods and leisure service goods. Leysdown providing a large number of amusement arcades. Rushenden is the smallest local centre and given that it now only provides one unit we consider should no longer be identified as a local centre.

9.1.5 Our health check assessments have found that all display reasonable or good levels of vitality and viability. Of particular note, are the very low (or in some cases nil) vacancy level present in the local centres.

9.1.6 Overall, the majority of centres meet 'day to day' shopping/service needs of their local communities.

9.1.7 We consider, with the exception of Rushenden, the local centres in the Borough continue to serve a complimentary role to the three town centres and are each performing the role of a local centre. We do not consider that any of the Borough's local centres require substantial retail or leisure development in order to improve their vitality and viability.

10.0 Quantitative Retail Needs Assessment

10.1 Introduction

10.1.1 This section of the study provides an assessment of retail needs. It firstly considers convenience and comparison goods quantitative needs (retail capacity) before reviewing qualitative retail needs having regard to any identified deficiencies / 'gaps' in existing provision.

10.1.2 As part of the quantitative needs assessment the current population and available expenditure (for both convenience and comparison goods) across the Study Area is reviewed and assessed.

10.2 Retail Capacity

10.2.1 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2038 (i.e. at 2024, 2029, 2034 and 2038, 2038 being the end date of the next local plan period). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time.

10.2.2 A complete series of quantitative retail capacity tables are provided at **Appendices G-I** to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Population & Retail Expenditure

Population

10.2.3 The base population (2016) within each postal code sector has been calculated using Experian Micromarketer MMG3 data. The baseline population data takes into consideration the findings of the 2011 Census release. At the time of writing Kent County Council (KCC) had not published Local Authority level forecast population figures to Swale Borough Council. Accordingly, in agreement with Swale Borough, for the purpose of this study, population projections figures have been derived from the Experian Micromarketer MMG3 data which uses the ONS 2014 based sub national population projections. We would recommend that an addendum to the study is produced once relevant population growth figures are published by KCC.

10.2.4 The defined Study Area is estimated to contain a resident population of approximately 151,346 people at 2017 rising to 178,788 people at 2038. This represents an increase in population within the Study Area of 27,142 people (equating to an increase of 18.1%) between 2019 to 2038.

10.2.5 Figure 10.1 provides a detailed breakdown of the forecast population change within each survey zones in each of the reporting period to 2038.

Figure 10.1: Study Area Population by Survey Zone (2019-2038)

Zone	2019	2024	2029	2034	2038
1 - Isle of Sheppey	46,412	48,688	50,710	52,477	53,860
2 – Borough West	15,004	15,864	16,664	17,429	17,928
3 - Sittingbourne	51,966	54,889	57,618	60,297	62,312
4 – Central Borough	11,519	12,139	12,664	13,110	13,520
5 - Faversham	20,833	21,857	22,789	23,601	24,175
6- Borough East	5,612	5,921	6,219	6,492	6,693
Total	**151,346**	**159,358**	**166,664**	**173,406**	**178,488**

Source: Table 1, Appendix G

Expenditure

10.2.6 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and other retail/leisure planning consultants in calculating retail capacity.

10.2.7 Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 15. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Figure 10.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2019	-0.2	2.1
2020	0.2	2.9
2021	0.2	3.3
2022	0.1	3.4
2023	-0.1	3.4
2024	0.1	3.3
2025	0.1	3.2
2026	0.1	3.2
2027	0.1	3.1
2028	0.1	3.0
2029	0.0	3.1
2030	0.0	3.2
2031	0.2	3.4
2032	0.1	3.3
2033	0.2	3.3
2034	0.1	3.3
2035	0.2	3.3
2036	0.0	3.2
2037	0.0	3.2
2038	0.0	3.2

Source: Appendix 3, Retail Planner Briefing Note 15

10.2.8 For convenience goods, Experian forecasts growth to remain subdued with a longer term forecast per head growth of +0.1% per annum. For comparison goods, Experian identify growth to increase from 2.1% per annum to 3.4% per annum in the short term (2019-2023) with growth rates ranging between 3.0-3.4% per annum in the medium and longer term (2024-2038).

10.2.9 Experian Retail Planner Briefing Note 15 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. In accordance with retail planning standard practice, we have removed any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.

10.2.10 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.

10.2.11 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 Retail Planner Briefing Note 15) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Figure 10.3 is removed from identified expenditure as it is not available to stores within the Study Area.

Figure 10.3: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2019	3.6	15.9
2024	4.4	17.2
2029	4.9	17.7
2034	5.2	17.9
2038	5.3	18.0

Source: Appendix 3, Retail Planner Briefing Note 15
2038 Forecast assessed to be same forecast as 2036

10.2.12 Based on the Retail Planner growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2019, 2024, 2029, 2034 and 2038. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

10.2.13 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2019, the resident population of the Study Area will generate some £310.1m of convenience goods expenditure. Available convenience goods expenditure is then forecast to increase to £364.6m at 2038, which represents an increase of £54.5m (or 17.6%) between 2019 and 2038.

Figure 10.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2019 (£m)	2024 (£m)	2029 (£m)	2034 (£m)	2038 (£m)	Growth 2019-2024 (£m)	Growth 2019-2029 (£m)	Growth 2019-2034 (£m)	Growth 2019-2038 (£m)
310.1	324.8	339.2	353.6	364.6	14.7	29.2	43.5	54.6

Source: Table 3, Appendix G
2016 Prices

Comparison Goods Expenditure

10.2.14 For comparison goods, Figure 10.5 sets out our estimation that the resident population of the Study Area generates some £487.3m of comparison goods expenditure in 2019. Available comparison goods expenditure is then forecast to increase to £1,014m at 2038, which represents an increase of £526.8m (or 108.1%) between 2018 and 2038.

10.2.15 Whilst the identified expenditure increase is significant, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever-increasing proportion of comparison goods expenditure will be committed through internet shopping.

Figure 10.5: Total Available Study Area Expenditure – Comparison Goods (£m)

2019 (£m)	2024 (£m)	2029 (£m)	2034 (£m)	2038 (£m)	Growth 2019-2024 (£m)	Growth 2019-2029 (£m)	Growth 2019-2034 (£m)	Growth 2019-2038 (£m)
487.3	584.2	712.2	867.9	1,014	96.9	224.9	380.8	526.8

Source: Tables 5a-e, Appendix G
2016 Prices

10.2.16 For the purposes of this Study, comparison goods expenditure has been divided into 11 subcategories: 'DIY', 'Large Electrical Household Items', Small Electrical Items', and 'Furniture, Carpets & Floor Coverings' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Furnishings & Household Textiles', 'Health and Beauty/Chemist Goods', 'Small Household Goods', 'Clocks Jewellery & Watches', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

10.2.17 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

Capacity Formula

10.2.18 For all types of retail capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') equals Surplus or Deficit (£m).

Expenditure (£m) – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).

Turnover (£m) – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Global Data reports – independent analysis which lists the sales densities for all major multiple retailers.

Surplus/Deficit (£m) – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.

10.2.19 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Capacity for Future Convenience Goods Floorspace

10.2.20 In order to ascertain the likely need for additional convenience floorspace in the town centres in Swale, it is first necessary to consider the performance of the current provision. Given the geography of the towns and their existing retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to the town centres (Sittingbourne, Faversham and Sheerness) will be commensurate with their current market share.

10.2.21 Figure 10.6 sets out the current convenience goods trading position in the towns compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2038. The benchmark turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey derived turnover equates to the expected level of turnover).

10.2.22 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, we have assessed the split in convenience/comparison goods provision in each store having regard to our own observations during store visits and the typical convenience/comparison floorspace ratio published by retail data provider, Global Data. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

10.2.23 Our assessment for the study area identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £309.5m per annum at 2018, which is £16.5m more than the identified survey-derived turnover (including inflow) of £293.0m. This suggests that, taken cumulatively, existing convenience goods provision in the study area are 'under trading' when compared to expected turnover.

10.2.24 There are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi stores in Sittingbourne and Sheerness, which have an estimated benchmark turnover of £8.8m and £9.2m respectively but turn over an estimated £23.8m and £20.7m respectively are trading particularly well. In contrast, the Morrisons store at Neats Court Retail Park, Queenborough with an estimated benchmark turnover of £30.0m, but turns over an estimated £20.6m, is a lesser performing store.

10.2.25 It is necessary to consider the capacity on an individual town basis. Figure 10.6 below sets out the convenience goods expenditure capacity estimates for Sittingbourne, Faversham and Sheerness. The assessment identifies that, with the exception of Faversham, there is presently capacity for additional convenience floorspace in the towns within the Borough. The lack of capacity within Faversham is primarily due to the existing convenience goods retail provision in the town.

Figure 10.6: Quantitative Need for Convenience Goods Floorspace

Year	Benchmark Turnover (£m)	Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)
Sittingbourne					
2019	137.9	135.9	0.8	-1.3	-
2024	137.9	142.3	0.8	5.2	500
2029	138.6	148.6	0.9	10.9	1,000
2034	139.2	154.9	0.9	16.7	1,500
2038	139.9	159.8	0.9	20.8	1,900
Faversham					
2019	74.0	58.5	1.0	-14.5	-
2024	74.0	61.3	1.1	-11.6	-
2029	74.4	64.0	1.1	-9.2	-
2034	74.7	66.8	1.1	-6.8	-
2038	75.1	68.8	1.2	-5.0	-
Sheerness					
2019	89.0	86.2	1.9	-0.8	-
2024	89.0	90.3	2.0	3.4	300
2029	89.4	94.3	2.1	7.0	700
2034	89.8	98.3	2.2	10.8	1,000
2038	90.2	101.4	2.3	13.5	1,200

Source: Tables 5a, 5b, 6a, 6b, 7a, 7b, 8a & 8b of Appendix H
Floorspace Requirement - Average sales density assumed to be £10,679/sq m (@ 2019) based on the average sales density of all grocery operators - derived by Global Data
Allows for increased turnover efficiency
2016 Prices

10.2.26 The Council has confirmed that, at the time of writing, there are no convenience goods retail commitments/planning permissions in the Borough that need to be taken into account in this retail capacity assessment.

Capacity for Future Comparison Goods Floorspace

10.2.27 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area, and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2019.

10.2.28 We assume that there is therefore a nil quantitative need for any additional floorspace across the study area at 2019. For the purpose of our initial quantitative modelling exercise, it has also been assumed that the future performance of comparison goods facilities in Swale Borough will be commensurate with their current market share. Our assessment also takes into consideration the fact that the town centres, retail parks and standalone large format retail units will attract some custom from outside the Study Area. Through discussions with the Council and consideration of the previous retail study we have assumed that this is 2% (£2.3m @ 2019) of the overall turnover of comparison goods retailers in the town centre of Sittingbourne, 8% (£2.5m @ 2019) of turnovers for Faversham and 3% (£1.2m @ 2019) for Sheerness.

10.2.29 In order to ascertain the likely need for additional comparison goods floorspace within each town, we consider them independently and identify their market share below. At the time of writing, the Council has confirmed that there are no comparison goods retail commitments/planning permissions within the Borough that need to be taken into account in the retail capacity assessment.

<u>Sittingbourne</u>

10.2.30 Facilities in the Sittingbourne area claim £166.3m of all comparison goods expenditure generated by Swale residents at 2019 which equates to a study area market share of 34%. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Sittingbourne's retail facilities going forward. By 'rolling forward' this market share and making provision for inflow deriving from visitors to Sittingbourne we estimate that facilities in Sittingbourne will attract £199.4m of comparison goods expenditure at 2024, increasing to £243.1m at 2029, £296.2m at 2034, and to £346.1m at 2038.

10.2.31 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2024 there will be expenditure surplus of £17.5m to support additional comparison goods floorspace within Sittingbourne. As set out in Figure 10.7, this surplus is forecast to increase to £40.6m at 2029, to £70.9m at 2034 and further to £100.6m at 2038. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time). This surplus expenditure equates to a comparison goods floorspace requirement of between 2,900sq m and 5,300sq m net (depending on format and operator) by 2024, increasing to between 6,000sq and 11,100sq m net by 2029, between 9,500sq m and 17,300sq m net by 2034 and increasing further to between 12,300sq m and 22,600sq m net by 2038.

Figure 10.7: Quantitative Need for Comparison Goods Floorspace in Sittingbourne

Year	Benchmark Turnover (£m)	Sittingbourne Turnover (£m)	Sittingbourne Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2024	184.9	199.4	3.0	17.5	2,900	5,300
2029	206.2	243.1	3.7	40.6	6,000	11,100
2034	229.9	296.2	4.5	70.9	9,500	17,300
2038	250.8	346.1	5.3	100.6	12,300	22,600

Source: Table 15a & 15b of Appendix I
Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15
Assumes constant market share of Study Area expenditure claimed by facilities in Sittingbourne
2016 Prices

Faversham

10.2.32 In assessing the quantitative need for additional comparison goods floorspace in Faversham, we once again adopt the position that existing facilities are trading 'in equilibrium' and that there is therefore a nil quantitative need for any additional floorspace across Faversham at 2019. It has also again been assumed for this assessment that the future performance of Faversham's comparison goods facilities will be commensurate with their current market share.

10.2.33 Through consideration of the comparison goods facilities in, and attractiveness of, the town centre to visitors/tourists, we have made an estimate of the proportion of centre/facility turnover derived from outside the Study Area. Our inflow estimates are set out in Table 14 of **Appendix I.**

10.2.34 The inflow allowance has the net effect of increasing Faversham's identified comparison goods survey derived turnover from £32.8m to £35.3m at 2019.

10.2.35 The £32.8m of comparison goods expenditure claimed from inside the Study Area at 2019 equates to a market share of 7% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Faversham's retail facilities going forward.

10.2.36 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Faversham will attract £39.3m of comparison goods expenditure at 2024, increasing to £47.9m at 2029, £58.3m at 2034, and to £68.2m at 2038.

10.2.37 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2024 there will be an expenditure surplus of £3.7m to support additional comparison goods floorspace within Faversham. As set out in Figure 10.8, this surplus is forecast to increase to £8.5m at 2029, to £14.8m at 2034 and further to £21.0m at 2038. Account has again been made for the turnover efficiency of existing comparison goods floorspace to increase.

10.2.38 This surplus expenditure equates to comparison goods floorspace capacity of between 600sq m and 1,100sq m net (depending on format and operator) by 2024, 1,300sq m and 2,300sq m net by 2029 and 2,100sq m to 3,600sq m net by 2034. By 2038, there is identified capacity for between 2,700 and 4,700sq m net comparison goods floorspace.

Figure 10.8: Quantitative Need for Comparison Goods Floorspace in Faversham

Year	Benchmark Turnover (£m)	Faversham Turnover (£m)	Faversham Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2024	38.6	39.3	3.0	3.7	600	1,100
2029	43.1	47.9	3.7	8.5	1,300	2,300
2034	48.0	58.3	4.5	14.8	2,100	3,600
2038	52.4	68.2	5.2	21.0	2,700	4,700

Source: Table 18a & 18b of Appendix I
Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15
Assumes constant market share of Study Area expenditure claimed by facilities in Faversham
2016 Prices

Sheerness

10.2.39 For Sheerness, facilities in the area claim £55.7m of all comparison goods expenditure generated by residents at 2019, which equates to a market share of 11%. By 'rolling forward' this market share and making provision for inflow deriving from visitors to Sheerness, we estimate that facilities in Sheerness will attract £66.8m of comparison goods expenditure at 2024, increasing to £81.4m at 2029, £99.2m at 2034, and to £115.9m at 2038.

10.2.40 Taking into account the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2024 there will be surplus expenditure of £6.1m to support additional comparison goods floorspace within Sheerness. This surplus is forecast to increase to £14.2m at 2029, to £24.8m at 2034 and further to £35.3m at 2038. This surplus expenditure equates to a comparison goods floorspace requirement of between 1,100-1,900sq m net (depending on format and operator) by 2024, increasing to between 2,200-3,900 sq m net by 2029, between 3,500-6,100sq m net by 2034 and increasing further to between 4,500-7,900sq m net by 2038.

Figure 10.9: Quantitative Need for Comparison Goods Floorspace in Sheerness

Year	Benchmark Turnover (£m)	Sheerness Turnover (£m)	Sheerness Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2024	64.8	66.8	4.2	6.1	1,100	1,900
2029	72.3	81.4	5.1	14.2	2,200	3,900
2034	80.6	99.2	6.2	24.8	3,500	6,100
2038	87.9	115.9	7.3	35.3	4,500	7,900

Source: Table 17a & 17b of Appendix I
Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15
Assumes constant market share of Study Area expenditure claimed by facilities in Sheerness
2016 Prices

10.3 Summary

10.3.1 The above assessment identifies that, with the exception of Faversham, there is presently capacity for additional convenience floorspace in the towns within the Borough. The lack of capacity within Faversham is primarily due to the existing convenience goods provision in the town. Our assessment has identified that most of the existing convenience goods facilities in Faversham are currently under trading which suggests that there is an overprovision of convenience goods facilities in the town.

10.3.2 Potential convenience goods capacity in Sittingbourne and Sheerness in the medium term (10 years) is modest with capacity in the longer term to potentially support a medium sized foodstore (or an extension/s to existing facility/ies) in both towns.

10.3.3 The comparison goods capacity for each town varies. As the largest town in Swale, the majority of comparison goods floorspace capacity is identified in Sittingbourne (between 12,300 and 22,600sq m net by the end of the plan period). A reasonable level of comparison goods floorspace capacity is also identified for Faversham (between 2,700 and 4,700sq m net) and Sheerness (4,500 and 7,900sq m net) by the end of the plan period.

11.0 Commercial Leisure Needs Assessment

11.1 Introduction

11.1.1 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Swale currently meets the needs of their population in relation to the bingo, cinema, ten-pin bowling, restaurant and café/coffee shop, and health and fitness gym sectors.

11.1.2 As we noted in Section 4 of the study, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved and the use of contact by home telephone only. The results should therefore be taken to be a broad indication of consumer preferences.

11.1.3 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the two administrative areas. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future needs.

11.1.4 In considering future commercial leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of Swale's current market share, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

11.1.5 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the need for additional facilities.

11.2 Participation Leisure Activities

11.2.1 Figure 11.1 examines participation rates for a range of leisure activities (including non-commercial leisure activities) across the 6 zones of the Study Area. It is shown that the most popular single activity is to visit restaurants, which an average of 57% of Study Area respondents participate in, followed then by visiting the cinema (48% of respondents), café's and coffee shops (41%) and then pubs and bars (40% of respondents). Less popular activities include visiting nightclubs, bingo halls, indoor rock-climbing centres and trampolining.

Figure 11.1: Participation in Leisure Activities by Zone (%)

Activity	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Study Area Av.
	1	2	3	4	5	6		
Restaurant	54%	63%	50%	60%	76%	54%		57%
Café / coffee shop	38%	35%	38%	27%	63%	43%		41%
Indoor health & fitness	13%	12%	20%	7%	16%	15%		15%
Cinema	46%	51%	50%	33%	55%	43%		48%
Pub / bar	41%	39%	40%	34%	51%	34%		41%
Ten pin bowling	17%	17%	19%	7%	13%	7%		16%
Bingo	8%	10%	4%	13%	3%	3%		6%
Theatre / concert hall	22%	30%	29%	29%	45%	33%		30%
Museum / art galleries	15%	11%	14%	19%	39%	21%		18%
Nightclub	1%	2%	3%	1%	-	-		2%
Trampolining	3%	6%	5%	-	1%	1%		3%
Indoor rock climbing	2%	-	-	-	-	-		1%
(None of these)	20%	19%	16%	18%	3%	15%		16%

Source: Question 18 of the NEMS Household Survey

11.2.2 When comparing participation levels across each zone, a higher proportion of respondents within Zone 5 (Faversham) participate in leisure activities than those in other zones. Indeed only 3% of respondents here indicated that they didn't undertake any of the mentioned leisure activities, compared with an overall average of 16% across the Borough. Participation levels in the other mentioned activities is higher than the average, with the exception of trampolining, rock climbing, bingo and going to nightclubs.

11.2.3 Zone 1 (Isle of Sheppey) has the highest proportion of people who responded that they didn't take part in any mentioned leisure activity (20%). Zones 2 (Borough West) and 4 (Central Borough) also had similar proportion of respondents that didn't take part in any mentioned leisure activity (18-19%).

11.2.4 Of the commercial leisure facilities that people would like to see more of within the Borough, responses indicate that new cinema facilities would be the most popular (19%) with circa a quarter of respondents in Zones 1-3 indicating they would like to see this. The second and third most popular commercial leisure facilities that respondents in the Borough would like to see more of was bowling alley (8%) and restaurant/cafes (6%).

11.2.5 In terms of non-commercial leisure facilities that residents in the Borough would like to see more of the most popular response was 'more activities or facilities for children' (6%). Other responses included outdoor play areas / park facilities (5%) and more sports facilities (4%).

11.2.6 It is interesting to note that half of respondents in the Borough indicated that they would not like to see any more of the mentioned commercial leisure facilities suggesting that they are generally satisfied with the current provision available.

Figure 11.2: Leisure Facilities that respondents would like to see more of, by zone

Activity	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Study Area Av.
	1	2	3	4	5	6		
Bowling alley	3%	11%	17%	5%	1%	2%		8%
Cinema	26%	23%	24%	8%	3%	3%		19%
Health & fitness (gym)	3%	1%	1%	4%	3%	3%		2%
Restaurants / cafés	-	10%	12%	4%	1%	1%		6%
Swimming pool	4%	1%	6%	2%	1%	-		4%
Trampolining	-	2%	5%	-	-	-		2%
More children's facilities / activities	10%	3%	8%	4%	5%	6%		7%
Outdoor play areas / park facilities	3%	2%	1%	-	1%	4%		2%
More outdoor sports facilities	7%	1%	2%	5%	2%	7%		4%
(None)	43%	66%	44%	65%	66%	62%		51%
(Don't know)	6%	2%	6%	6%	5%	15%		6%

Source: Question 29 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.3 Restaurant & Cafés/Coffee Shops

11.3.1 Figures 11.3 summarises the proportion of restaurant trips directed to destinations inside and outside Swale, based upon the results of the household survey.

11.3.2 Figure 11.3 identifies that just under half of the total number of visits (48%) by residents across all zones are made to restaurants within Swale. Faversham attracts the greatest proportion of these (20% of the total), followed by Sittingbourne (13%) and then Sheerness (8%). It is noted that restaurants in Canterbury have an influence across Swale and in particular Zone 6 (Borough East) which is the closest zone to Canterbury. Figure 11.3 shows:

- Sittingbourne - retains just over a third (35%) of the restaurant market share from those living in the town (Zone 3) and also captures just over 10% of the market share from Zones 2 (Borough West) and 4 (Central Borough). The retention levels and influence of restaurant facilities in Sittingbourne is considered to be reasonably low for the size of the town which in part reflects an under provision of facilities in the town centre. Following the completion of the Spirit of Sittingbourne development in the town centre, we would expect that the restaurant market share captured by the town centre will increase and the identified deficiencies addressed.

- Faversham - retains the majority of restaurant trips (61%) from its zone (Zone 5) and has an influence on trips in neighbouring Zones 4 (Central Borough) and 6 (Borough East) capturing the highest proportion of trips (44% and 45% respectively) from each zone. Overall, the identified retention levels are considered to be good, with the survey results indicating that the town is an attractive destination for restaurant visits.

- Sheerness - restaurants in the town retain only a quarter of trips from the Isle of Sheppey zone (Zone 1). Some 21% of trips take place at locations outside the three main towns including Halfway House (7%), Minster on Sea (6%) and Queenborough (4%). It is noted that Maidstone and Rochester capture 18% and 13% of restaurant trips from Zone 1. Restaurant facilities in Sheerness have very little influence on the other survey zones. They survey results suggest there is a deficiency in restaurant provision in Sheerness which reflects our health check assessment of the town centre where only 3 restaurants were recorded.

Figure 11.3: Study Area Market Share for Restaurant Visits, by Zone

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Total
	1	2	3	4	5	6		
Inside Borough	**48%**	**28%**	**40%**	**61%**	**64%**	**48%**		**48%**
Sittingbourne Town Centre		12%	35%	11%	2%			13%
Faversham Town Centre	1%	3%	5%	44%	61%	45%		20%
Sheerness Town Centre	26%	4%						8%
Other locations inside the Borough	21%	9%		6%	1%	3%		8%
Outside Borough	**52%**	**72%**	**59%**	**38%**	**36%**	**51%**		**52%**
Bluewater Shopping Centre	4%		3%					2%
Canterbury	7%	8%	21%	25%	18%	35%		16%
Chatham		3%	5%		3%			2%
Gillingham	2%	2%	2%		6%			2%
Hempstead	3%	3%			2%			2%
Maidstone	18%	9%	13%	4%				10%
Rochester	13%	12%	1%					5%
Whitstable		3%		1%	4%	12%		2%
Other Locations outside the Borough	5%	32%	14%	8%	7%	4%		8%

Source: Question 23 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.3.3 Turning to cafes and coffee shops, Figure 11.4 shows that overall Swale retains a higher proportion of café/coffee shops visits trips (73%) within the Borough. The retention rates are highest in Zone 5 (Faversham (92%)) and Zone 1 (Isle of Sheppey (84%)) with the lowest retention levels experience in Zone 6 (Borough East (32%)) and Zone 2 (Borough West (36%)). Cafes/coffee shops in Hempstead

Valley, capturing 20% of trips, have the greatest influence in Zone 2 whilst, similar to the trip patterns for restaurants Canterbury has the greatest influence on Zone 6 (40%).

Figure 11.4: Study Area Market Share for Café/Coffee Shop Visits, by Zone

Zones	Isle of Sheppey 1	Borough West 2	Sittingbourne 3	Central Borough 4	Faversham 5	Borough East 6		Total
Inside Borough	**84%**	**36%**	**63%**	**66%**	**92%**	**32%**		**73%**
Sittingbourne	6%	31%	56%	21%		2%		20%
Sittingbourne Town Centre	3%	29%	45%	21%		2%		19%
Sittingbourne Other	3%	2%	11%					1%
Faversham Town Centre		2%	7%	38%	92%	27%		27%
Sheerness	66%							18%
Sheerness Town Centre	47%							13%
Neats Court Retail Park	19%							5%
Other locations inside of the Borough	12%	3%		7%		3%		7%
Outside Borough	**16%**	**64%**	**37%**	**34%**	**8%**	**68%**		**27%**
Canterbury	2%		18%	28%	7%	40%		11%
Central London		12%	3%					2%
Gillingham		6%	2%	4%				1%
Whitstable			3%	2%		26%		2%
Maidstone	14%	5%	6%					6%
Hempstead		20%						2%
Bluewater Shopping Centre		2%	4%					1%
Other Locations Outside the Borough		20%	2%		1%	2%		2%

Source: Questions 24 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.3.4 Figure 11.4 also shows that:

- Sittingbourne – retains just over half (56%) of trips from within its study zone (Zone 3), with 45% being captured by cafes/coffee shops in the town centre. The town also captures a reasonable level of trips from neighbouring Zones 2 and 4 (31% and 21% respectively). Overall, we consider the retention levels are considered to be reasonably good, and subject to the end occupiers of units in the Spirit of Sittingbourne redevelopment, are likely to be improved.

- Faversham - captures a very healthy level of café/coffee shop trips from its zone (Zone 5) with just 8% of trips leaking to facilities outside the Borough (primarily Canterbury). The town centre also draws from the wider area, attracting 38% and 27% of the market from Zone 4 (Central Borough) and Zone 6 (Borough East). Overall, the identified retention levels are considered to be very good.

- Sheerness – retains some 66% of café/coffee shop from its zone (Zone 1 (Isle of Sheppey)) with 47% of trips taking place within the town centre and 19% at Neats Court Retail Park. Café/coffee shop facilities in Sheerness do not attract any other trips from within the Borough. Given the location of Sheerness, the lack of influence across the other study zones is not surprising or a particular cause for concern. We consider that the retention levels are considered to be reasonably good.

11.4 Health and Fitness

11.4.1 As identified in Figure 11.1, the household survey indicates that 15% of respondents in the Study Area visit indoor health and fitness facilities. Of the participating respondents, the main destinations mentioned are summarised in Figure 11.5.

Figure 11.5: Study Area Market Share for Indoor Health & Fitness by Zone

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Total
	1	2	3	4	5	6		
Inside Borough	**100%**	**83%**	**100%**	**100%**	**96%**	**66%**		**96%**
Sittingbourne	26%	64%	96%	27%	-	14%		52%
Faversham	-	-	-	26%	62%	37%		13%
Sheerness	69%	14%	-	-	-	-		20%
Other locations inside Borough	5%	5%	4%	47%	34%	15%		11%
Outside Borough	**0%**	**17%**	**0%**	**0%**	**4%**	**34%**		**3%**

Source: Questions 19 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.4.2 Swale retains 96% of indoor health and fitness trips from within the study area with 100% trips from Zones 1, 3 and 4 being made within the Borough. Some 34% of trips in Zone 6 (Borough East) are made outside the Borough, primarily at facilities in Canterbury.

11.4.3 Figure 11.5 shows that Sittingbourne attracts 52% of all trips to health & fitness facilities within the Borough. It retains 96% of the market share from its study zone (Zone 3), but also attracts a significant proportion of trips from Zone 2 (Borough West) and exerts influence on Zones 1 (Isle of Sheppey), 4 (Central Borough) and 6 (Borough East).

11.4.4 Faversham retains 62% of the trips from its study area and it also attracts trips from adjacent zones (Central Borough and Borough East). Notably, 34% of health & fitness trips made by residents of Faversham are made to facilities outside of the main towns, with most made to Syndale Park Personal Fitness Club, a facility located just outside Faversham.

11.4.5 Sheerness attracts 20% of all trips from within Swale, the majority come from the Isle of Sheppey (Zone 1) and the remainder from Zone 2 (Borough West). Other facilities outside of the main towns within Swale attract 11% of all trips when combined.

11.4.6 In terms of improvements to health & fitness facilities in Swale, only 2% of all respondents across Swale suggested that that they would like to see more health & fitness facilities in their area (see Figure 11.2), which indicates that respondents are generally satisfied with the current provision in Swale. This being said however, we note from the 'Requirements List' that gym operators are seeking floorspace in each of the three main towns within the Borough.

11.4.7 Having regard to the projected increase in population in the Borough, there is likely to be a quantitative need for new health and fitness gym facilities. We have sought to quantify this likely requirement based on current rates of participation in Figure 11.6 below. In considering the requirements set out, it should be noted that a new modern conveniently located indoor health and fitness facility is likely to result in some new gym members and in turn an uplift in participation rates.

Figure 11.6: Health and Fitness Gym Requirement in Swale Borough

Year	Study Area Population Increase	Typical Population Required to Support New Gym	Study Area Custom Claimed by Swale Borough	Potential No. of Gyms Supported in Swale Borough
2019-2038	27,142	2,800 - 3,500	96%	7.4 - 9.3

Note: Typical population required to support new gym sourced from information published by gym operators (including company account reports/accounts)

11.4.8 The increase in population anticipated in the Study Area in the period to 2038 is anticipated to be 27,142. Applying the market share for indoor health and fitness gym facilities in Swale (96%) this identifies potential for 26,056 new gym members within the Borough.

11.4.9 Information published by a number of health and fitness operators identify that typical/average members per health and fitness gym facility ranges from 2,800 to 3,500 members. Based on the typical/average members per health and fitness facility, there could be a requirement for between 7-9 health and fitness gyms in Swale.

11.4.10 In summary, whilst there is not currently considered to be a general qualitative deficiency in existing health and fitness gym facilities in the Borough, there are outstanding requirements from gym operators seeking to open based on the current market share of existing facilities in Swale, there is likely to be a quantitative need for between 7-9 additional facilities within the plan period.

11.5 Cinema

11.5.1 Cinema provision in Swale is of a relatively small scale and is made up of three independently run cinemas:

- New Century Cinema, High Street, Sittingbourne – This independently owned cinema operates in the same building as the Gala Bingo hall. The cinema has 2 screens and shows the latest popular film releases. The cinema shows films during the afternoon and evenings throughout the week.

- Royal Cinema, Market Place, Faversham – The Royal is an independently owned and operated cinema occupying a Mock-Tudor building off Market Place. Originally built as an Odeon Cinema, it has 1 screen, typically showing 2 films per day.

- The Criterion Cinema, High Street Sheerness – A very small cinema forming part of the larger Criterion Blue Heritage Centre. The centre hosts music hall shows, theatre events and also has a giftshop and a small tea room. Classic films and musicals are shown regularly at the cinema with other film screenings held every Friday.

11.5.2 Figure 11.7 shows that across the study zones, 41% of cinema trips are made to facilities within Swale with 22% made to the New Century Cinema in Sittingbourne, 18% to the Royal Cinema in Faversham and 1% to the Criterion in Sheerness.

Figure 11.7: Study Area Market Share for Cinema Visits

Zones	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East	Total
	1	2	3	4	5	6	
Inside Borough	**28%**	**18%**	**46%**	**52%**	**77%**	**28%**	**41%**
Sittingbourne							
New Century Cinema, High Street	20%	18%	38%	6%	2%	22%	22%
Faversham							
Royal Cinema, Market Place	4%		4%	42%	73%	26%	18%
Sheerness							
Criterion Blue Town, High Street	4%						1%
Outside Borough	**71%**	**82%**	**58%**	**52%**	**25%**	**74%**	**59%**
Cineworld, Rochester	29%	24%	26%	13%	2%		21%
Odeon, Chatham	19%	44%	16%	11%	2%		17%
Cineworld, Ashford	4%		1%	14%	9%	27%	4%
Curzon, Canterbury		1%			4%	30%	2%
Gulbenkian Cinema, Canterbury			1%	4%		14%	1%
Odeon, Barker Road, Maidstone	14%	3%	3%	2%			5%
Showcase Cinema, Bluewater	9%	8%	5%	2%			5%
Other Locations outside Borough		2%	6%	6%	8%	3%	4%

Source: Questions 22 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.5.3 The New Century Cinema, Sittingbourne attracts trips from each of the survey zones, capturing between 18 and 38% of trips from Zones 1, 2, 3 and a smaller portion from Zones 4 and 5. With the exception of Zone 2, The Royal Cinema in Faversham also attracts trips from across the study zones. 73% of cinema visits from Faversham (Zone 3) are captured by The Royal.

11.5.4 In terms of the influence of more modern or multiplex cinemas outside Swale, the Cineworld at Medway Valley Leisure Park in Rochester has the largest influence, capturing 21% of trips overall and between 26% and 29% of trips originating from Zones 1-3. The Odeon in Chatham also has a significant influence capturing 44% of all trips from Zone 2 (Borough West). Cinema facilities in Canterbury (Curzon Cinema and Gulbenkian Cinema) and Ashford (Cineworld) have a particular influence on trips in Zone 6 (Borough East)

11.5.5 Mintel estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the Study Area, we estimate that there will be 408,634 cinema admissions arising the Study Area population at 2019, increasing to 481,918 admissions by 2038. Based on the assumed number of visits per screen, we calculate that around 9.5 screens can be supported in the Study Area at 2019, increasing to 11.2 screens at 2038. Our calculations are set out below in Figure 11.8.

Figure 11.8: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2019	151,346	2.7	408,634	42,927	9.5
2024	159,358	2.7	430,267	42,927	10.0
2029	166,664	2.7	449,993	42,927	10.5
2034	173,406	2.7	468,196	42,927	10.9
2038	178,488	2.7	481,918	42,927	11.2

11.5.6 As shown in Figure 11.9 below, based on the current market share, around 4.1 cinema screens could currently be supported in Swale Borough, increasing to around 4.8 screens at 2038. This is broadly in line with the current provision.

Figure 11.9: Cinema Screen Requirement in Swale Borough

Year	Screens Supported	Study Area Custom Claimed by Swale	No. of Additional Screens Supported in Swale
2019	9.5	43%	4.1
2024	10.0	43%	4.3
2029	10.5	43%	4.5
2034	10.9	43%	4.7
2038	11.2	43%	4.8

11.5.7 However, given the relatively low market share retention of cinema trips and in the absence of a modern cinema facility in the Borough we consider that there is a qualitative need to improve cinema provision in the Borough.

11.5.8 The planned new modern multi-screen cinema to be delivered as part of the Spirit of Sittingbourne development in Sittingbourne will enhance the qualitative provision of cinema facilities in the town and across the Borough and, we consider, will meet this qualitative deficiency.

11.6 Tenpin Bowling

11.6.1 The Swale Borough administrative area currently does not accommodate a tenpin bowling facility meaning that all bowling trips are currently made to facilities outside of the Borough.

11.6.2 Figure 11.10 shows that the Hollywood Bowl at Medway Leisure Park in Rochester attracts approximately half of bowling trips from Swale with 19% attracted to the Hollywood Bowl at Lockmeadow Entertainment Centre in Maidstone and 16% to MFA in Whitstable. Other bowling facilities which attract residents in Swale include Hollywood Bowl in Ashford and Lordswood Bowling Centre in Chatham.

Figure 11.10: Study Area Market Share for Tenpin Bowling Visits

Facility	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Total
	1	2	3	4	5	6		
Hollywood Bowl, Maidstone	22%	15%	27%					19%
Hollywood Bowl, Rochester	55%	66%	59%			28%		49%
Hollywood Bowl, Ashford		4%		25%	31%			5%
Lordswood Bowling Centre, Chatham	24%	6%	3%					9%
MFA Bowl, Whitstable				75%	69%	63%		16%
Other		9%				9%		1%

Source: Question 26 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.6.3 In the absence of a Tenpin Bowling facility in the Borough there could be potential for Swale to be able to accommodate a facility. However, at the current time there are no requirements from tenpin bowling operators to open a new facility in the Borough. We recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

11.7 Bingo

11.7.1 Swale currently accommodates two permanent bingo halls, the Mecca Bingo on the High Street in Sittingbourne Town Centre and Kings Bingo, Broadway, in Sheerness Town Centre, a smaller independently run hall. We understand Bingo activities also take place in a number village halls and community centres in other the some rural areas of the Borough.

11.7.2 The household survey indicates that visiting bingo halls is not a major leisure activity for the majority of respondents living within the study area since only 6% of respondents stated that they visit these facilities. Figure 11.11 shows that of those that do participate in bingo, Mecca Bingo in Sittingbourne is the most popular bingo hall in Swale, attracting 67% of all trips from within the study area. Bingo at the Community Centre in West Faversham attracts 12% of trips, while Kings Bingo in Sheerness attracts 4%. Mecca Bingo in Sittingbourne draws residents from each of the study zones except for Zone 6, while the other facilities draw from a smaller catchment.

Figure 11.11: Study Area Market Share for Bingo Visits

Facility	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Total
	1	2	3	4	5	6		
Inside Swale Borough	**83%**	**18%**	**100%**	**100%**	**100%**	**40%**		**84%**
Mecca Bingo, Sittingbourne	73%	9%	100%	61%	29%			67%
West Faversham Community Centre				34%	71%	40%		12%
Kings Bingo, Sheerness	11%							4%
Other Locations in Swale		9%		5%				2%
Outside Swale Borough	**17%**	**83%**	**0%**	**0%**	**0%**	**60%**		**16%**
Gala Bingo, Maidstone	8%	9%						4%
Gala Bingo, Rochester	8%	74%						11%
Mecca Bingo, Broadstairs						40%		1%

Source: Question 27 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.7.3 The Study Area has a total estimated population of 151,346 at 2019, increasing to 178,488 at 2038. Mintel identify that there were 354 bingo halls in the UK in 2016, which against the 2016 population of the UK of 65.1 million, suggests that each is supported by a catchment of 183,898 persons or thereabouts. Accordingly, we estimate that the Study Area population could theoretically support 0.7 bingo clubs at 2019, increasing to 0.8 bingo clubs by 2036.

Figure 11.12: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported by Study Area	Study Area Custom Claimed by Swale	Potential No. of New Halls Supported in Swale
2019	151,346	183,898	0.8	84%	0.7
2024	159,358	183,898	0.9	84%	0.8
2029	166,664	183,898	0.9	84%	0.8
2034	173,406	183,898	0.9	84%	0.8
2038	178,488	183,898	1	84%	0.8

11.7.4 It is considered that at the current time there is no demonstrable need to improve competition and choice in bingo halls in the Borough, although this will be subject to market demand from other bingo operators. Given that current trends for bingo halls show activity moving online instead of physical venues, future demand for new venues is expected to be very limited. We recommend that, if demand arises in the future, proposals for such development are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission

11.8 Arts and Cultural Activities

11.8.1 Arts and cultural activities play an important role in providing a distinct identity to places or towns, as well as being an important contributor to the local economy. Research by the Centre for Economic and Business Research (Cebr) in 2017 has quantified that every pound of GVA generated by the arts and culture industry, an addition £1.30 of GVA is generated in the wider economy through wider indirect and induced multiplier impacts of the industry. In overall terms, the arts and culture sector was estimated to have produced a turnover of £15.8 billion and was the responsible for the employment of approximately 131,200 people in the UK in 2015.

11.8.2 For the purpose of this assessment consideration is given to the provision of theatres and museum/art facilities within Swale. In addition, there are a number of cultural event spaces which are able to host a variety of events that attract visitors to the town centre. Figure 11.13 details the main cultural venues in the Borough.

11.8.3 The results of the household survey indicate that 18% of respondents from the study area (Borough) visit museums and galleries. Theatres are even more popular with some 30% of respondents taking part in these activities.

Figure 11.13: Main Museums/Cultural Venues in Swale

Activity	Venues
Museums	Eastchurch Aviation Museum, Sheerness Queenborough Guildhall Museum, Queenborough Sheerness Heritage Centre, Sheerness Sittingbourne Heritage Museum, Sittingbourne Belmont House and Gardens, Faversham Kent Police Museum, Faversham Old Forge Wartime House, Sittingbourne Milton Regis Court Hall Museum, Sittingbourne The Guildhall, Faversham Alexander Centre, Faversham Belmont House and Gardens, Faversham Fleur de Lis Heritage Centre, Faversham Shepherd Neame Brewery Visitor Centre, Faversham Chart Gunpowder Mills, Faversham The Maison Dieu, Faversham Blue Town Heritage Centre, Sheerness Rose Street Centre, Sheerness Minster Gatehouse Museum, Minster-on-Sea
Theatres	Sheppey Little Theatre, Sheppey The Avenue Theatre, Sittingbourne Arden Theatre, Faversham

11.8.4 In terms of trips to undertake art and cultural activities, as set out at in Figure 11.14, the vast majority (99%) are undertaken at attractions outside of Swale. Primarily due to: the limited size; the scale of arts and cultural facilities in the Borough; the location of the Borough to existing arts and cultural facilities in larger surrounding centres, and the fact that a large proportion of the facilities are primarily targeted for visitors/tourists (which reside outside the study area) such facilities only attract a study area market share of 1%.

11.8.5 Outside the Study Area, by far the most popular single destination for art and cultural trips originating in the Study Area is Canterbury (49% of trips), which is then followed by Central London (39% of trips). The latter results is not surprising given the greater choice of facilities/venues in the City and it being a major visitor/tourist destination.

Figure 11.14: Study Area Market Share for Theatres, Galleries & Museum

	Isle of Sheppey	Borough West	Sittingbourne	Central Borough	Faversham	Borough East		Total
	1	2	3	4	5	6		
Inside Swale	**0%**	**0%**	**0%**	**2%**	**5%**	**2%**		**1%**
Belmont House, Throwley, Faversham					1%	2%		<1%
Kent Police Museum, Faversham				2%	4%			1%
Outside Swale	**100%**	**100%**	**100%**	**98%**	**95%**	**98%**		**99%**
Central London	48%	33%	46%	14%	32%	31%		39%
Canterbury	43%	61%	42%	74%	48%	62%		49%
Brighton			10%					3%
Bromley				2%	4%			1%
Margate	1%	2%			2%	2%		
Maidstone	5%							1%
Dartford		2%	2%		1%			1%
Other Locations	3%	1%		9%	6%	3%		4%

Source: Questions 28 of the NEMS Household Survey
Notes: Figures may not add due to rounding

11.8.6 Overall, having regard to the size of the Borough and its towns the provision of arts and cultural facilities in the Borough is considered to be reasonable. Given that a large proportion of the facilities are primarily targeted for visitors/tourists (which reside outside the study area) we would recommend a more detailed review and assessment of relevant arts and culture facilities be undertaken as part of a potential Tourism Study.

12.0 Key Findings & Recommendations

12.1 Summary of Identified Need

12.1.1 The quantitative need findings identified for the Swale Borough are summarised in Figure 12.1 below.

Figure 12.1: Quantitative Capacity Summary (within plan period (2038))

Sector	Sittingbourne	Faversham	Sheerness
Convenience Goods (sq m net)	1,900	Nil	1,200
Comparison Goods (sq m net)	12,300-22,600	2,700-4,700	4,500-7,900
Health & Fitness (No.)	7-9 gyms (within Swale Borough)		
Cinema (No.)	Nil		
Bingo (No.)	Nil		
Tenpin Bowling (No.)	Nil		

Notes: Quantitative Capacity figures are post commitments/planning permissions.

Comparison Goods

12.1.2 Our study identifies that, as the largest town in Swale, the majority of comparison goods floorspace capacity over the plan period is identified in Sittingbourne and should be the main focus for future comparison goods shopping. A reasonable level of comparison goods floorspace capacity is also identified for Faversham and Sheerness by the end of the plan period.

12.1.3 Sittingbourne Town Centre provides a good level of independent retailers and for its size a reasonable range of national multiple retailers. The study identifies that there is a reasonably large level of expenditure leakage from Sittingbourne. Whilst the study indicates that there are qualitative deficiencies in the town centre's comparison goods provision, given the strength and provision in competing centres/facilities (notably Bluewater), the role and function of the centre in the sub-regional hierarchy, and the current challenging economic climate for retailers, it is considered difficult to envisage how the town centre would be able attract the quantum of retailers that would enable it to claw back this expenditure in the near future. We consider that the Council should seek to plan to improve Sittingbourne Town Centre's comparison goods market share by way of further qualitative improvements to the town centre, including, inter alia, improvements to the existing retail stock, encouraging a wider range/mix of uses, and town centre environmental improvements.

12.1.4 Whilst Faversham Town Centre benefits from a good level of independent retailers (82%), its overall comparison goods retail provision (including national multiple retailers) is not strong. The study identifies that the nearby larger town of Canterbury has a substantial influence on comparison goods shopping provision in Faversham's catchment area.

12.1.5 Turning to Sheerness Town Centre, its comparison goods retail offer is reasonably limited. The reasonably limited influence of comparison goods provision in the town centre is reflected in the results of the household survey which show that the town centre only retains a quarter of comparison goods trips from the Isle of Sheppey. Retail facilities in Sittingbourne have an influence on the comparison goods trips from the Isle of Sheppey.

Convenience Goods

12.1.6 Apart from Faversham, there is capacity for additional convenience floorspace in the towns within the Borough in the plan period. The lack of capacity within Faversham is primarily due to the existing convenience goods provision in the town. Potential convenience goods capacity in Sittingbourne and Sheerness in the medium term (10 years) is modest with capacity in the longer term to potentially support a medium sized foodstore (or an extension/s to existing facility/ies) in both towns.

12.1.7 The existing convenience goods expenditure retention rates in each of the three main towns are generally considered to be good with a good level of foodstore provision provided in each. Overall, we do not consider that there are any qualitative deficiencies in convenience goods provision in each town.

Restaurant/Café and Coffee Shop

12.1.8 The retention levels and influence of restaurant facilities in Sittingbourne are considered to be reasonably low for the size of the town which in part reflects an under provision of facilities in the town centre. In contrast the retention levels of café and coffee shops are considered to be reasonable. Following the completion of the Spirit of Sittingbourne development in the town centre, we would expect that the restaurant market share captured by the town centre will increase and the identified deficiencies addressed.

12.1.9 In terms of Faversham, overall, the identified retention levels of restaurant visits are considered to be good, with the study indicating that the town is an attractive destination for restaurant visits. For café and coffee shops, the study also identifies that retention levels of are considered to be very good with no indication of deficiencies.

12.1.10 The study indicates there is a deficiency in restaurant provision in Sheerness which reflects our health check assessment of the town centre where only 3 restaurants were recorded. In contrast, the retention levels in café and coffee shop are considered to be reasonably good.

Indoor Sport/Health & Fitness

12.1.11 Whilst there is not currently considered to be a general qualitative deficiency in existing health and fitness gym facilities in the Borough, there are outstanding requirements from gym operators seeking to open gym facilities in each of the three towns in the Borough. Based on the current market share of existing facilities in Swale, there is likely to be a quantitative need for between 7-9 additional facilities within the plan period.

12.1.12 Having regard to existing market share patterns it is recommended that the council should consider additional provision in central locations in the three Borough towns.

Cinema

12.1.13 In terms of the identified cinema needs for the borough given the relatively low market share retention of cinema trips and in the absence of a modern cinema facility in the Borough there is assessed to be a qualitative need to improve cinema provision in the Borough.

12.1.14 The planned new modern multi-screen cinema in the 'Spirit of Sittingbourne' development in Sittingbourne will enhance the provision of cinema facilities in the town and the Borough and, we consider, will meet this qualitative deficiency.

Bingo Hall

12.1.15 At the current time there is no demonstrable need to improve competition and choice in bingo halls in the Borough. Given that current trends for bingo halls show activity moving online instead of physical venues, future demand for new venues in the Borough is expected to be very limited.

Tenpin Bowling

12.1.16 The Borough does not currently accommodate a tenpin bowling facility meaning that all bowling trips are currently made to facilities outside the Borough.

12.1.17 In the absence of a bowling facility in the Borough there could be potential for Swale to be able to accommodate a facility. However, at the current time there are no requirements from tenpin bowling operators to open a new facility in the Borough.

Arts & Cultural Activities

12.1.18 In terms of arts and cultural activities (theatres and museum/art facilities), the study identifies that existing provision of the district towns is of a scale which is appropriate to their role in the hierarchy. Additional provision is likely to reflect particular opportunities related to distinct locations and the existing cultural tourism offer. Given that a large proportion of the facilities are primarily targeted at visitors/tourists (which reside outside the study area) we would recommend a more detailed review and assessment of relevant arts and cultural facilities be undertaken as part of a potential Tourism Study.

12.2 Identified Demand from Operators/Businesses

12.2.1 The identified demand from national retailers/operators for each town is summarised in Figure 12.2 below. Operators comprise convenience, comparison and commercial leisure uses. The summary table below does not include other town centre uses.

Figure 12.2: Demand from New Operators

Sittingbourne	
Aldi	Subway
Monkey Puzzle Day Nurseries	Pizza Hut Delivery
Age UK	Anytime Fitness
Faversham	
Savers	Subway
Vets4Pets	KFC
Aldi	Snap Fitness
Lidl	Anytime Fitness
Finch House Bakery	
Sheerness	
Age UK	Anytime Fitness
Vets4Pets	

Source: 'The Requirements List'

12.2.2 For their sizes and role, all three tows have a reasonably low level of demand from operators. Faversham currently has the greatest level of demand from operators with Sheerness having the lowest demand. Given the current economic climate the level of demand is not particularly surprising.

12.3 Proposed Network of Centres

12.3.1 In drawing up Local Plans, Paragraph 85 of the NPPF requests the LPA to define a network and hierarchy of centres.

12.3.2 Policy DM2 of the Adopted Local Plan identifies Sittingbourne, Faversham and Sheerness as 'town centres'. Underneath this the policy identifies 11 'local centres', these being: Queenborough, Rushenden, Minster, Halfway Houses, Eastchurch, Leysdown, Iwade, Newington, Milton Regis, Teynham, and Boughton).

12.3.3 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

"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 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 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.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."

12.3.4 Experian defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others) and Annex 2 of the NPPF:

"Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)."

12.3.5 In accordance with the findings of this Study, the role and functions of the centres, and in light of these definitions, we recommend that the Council retain Sittingbourne, Faversham and Sheerness as town centres.

12.3.6 In terms of local centres, Section 9 and **Appendix F** of the study examines the health and composition of the 11 centres. The study finds, with the exception of Rushenden, the local centres continue to serve a complimentary role to the three town centres and area each performing the role of a local centre. However, it is apparent that Rushenden Local Centre, given it now only provides one small newsagent, no longer functions as a local centre. We therefore recommend that it is no longer identified as one.

12.4 Recommended Local Impact Threshold

12.4.1 In accordance with national planning policy, it is appropriate to identify locally set retail thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as *"the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas uses for the storage, display or sale of goods"* (paragraph 16).

12.4.2 Adopted Local Plan Policy DM2 (Proposals for Main Town Centre Uses) sets a borough wide blanket impact assessment threshold of 2,500sq m gross (the NPPF impact threshold). We note the set threshold relates to proposals for all main town centre uses. The NPPF advocates a floorspace threshold for retail and leisure development proposals only. We would therefore recommend the policy is re-worded so it is clear that the impact threshold applies only to retail and leisure proposals in edge-of-centre or out-of-centre locations.

12.4.3 When setting a locally appropriate threshold, the NPPG considers the following aspects important in setting a locally appropriate threshold:

- Scale of proposals relative to town centres;
- The existing viability and vitality of town centres;
- Cumulative effects of recent developments;
- Whether local town centres are vulnerable;
- Likely effects of development on any town centre strategy; and
- Impact on any other planned investment.

12.4.4 Following the assessment undertaken within this study and having regard to, *inter alia*, the current health of the town centres; performance of the town centres; unit and floorspace composition of each of the town centres; increasing competition from the internet; and availability of units in the prime shopping area capable of meeting potential national multiple occupiers in each of the centres, WYG consider that a threshold of 500sq m for retail/leisure floorspace proposed outside of designated centres is appropriate. This should provide the Council with sufficient flexibility to assess the merits and potential impact implications of edge and out-of-centre retail and leisure applications.

12.4.5 The threshold should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

12.4.6 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

12.5 Review of Town Centre Boundaries and Primary Shopping Areas

12.5.1 The NPPF identifies that LPA's planning policies should define the extent of town centres and primary shopping areas and set out the range of uses permitted in such locations as part of a positive strategy for the future of each centre.

12.5.2 The existing Policies Map defines the Town Centre Boundaries, Primary Shopping Areas, Primary Shopping Frontages and Secondary Shopping Frontage for each of the town centres. As part of this study, and in line with the brief, WYG has reviewed the existing town centre boundaries and primary shopping areas. Our review has had regard to our vitality and viability health check and detailed analysis of each town centre. It should be noted that in order to encourage a more positive and flexible approach to planning for the future of town centres the NPPF (2018) deleted its predecessors' requirement for LPA's to identify primary and secondary frontages.

12.5.3 In making our recommendations on the primary shopping area and town centre boundaries we have had regard to the definitions of each set out in Annex 2 of the NPPF:

> *"**Town Centre** – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre sues within or adjacent to the primary shopping area…*
>
> ***Primary shopping area** – Defined area where retail development is concentrated."*

12.5.4 Figure 12.3 below summarise our recommendations and relevant plans showing recommended amendments are included at **Appendix J** of this study.

Figure 12.3: Recommended Town Centre Boundaries & Primary Shopping Areas

Town	Comments/Recommendations
Sittingbourne	Town Centre Boundary - apart from very minor boundary changes to include full building footprints no changes are required. Primary Shopping Area - curtailed to the west to exclude West Street. - extended to the north to include retail/leisure units proposed as part of Spirit of Sittingbourne redevelopment.
Faversham	Town Centre Boundary - extended to the west to include the Morrison's store, - curtailed to the south to remove railway station car park and residential properties to the south of Stone Street - curtailed to the east to exclude residential properties off Church Road Primary Shopping Area - apart from very minor boundary changes to include full building footprints no changes are required.
Sheerness	Town Centre Boundary - curtailed to the east to exclude residential properties to the north of Broadway and land to the rear of Sheerness Swimming Pool Primary Shopping Area - no changes required

12.5.5 In accordance with the NPPF that town centre boundaries should be kept under review, where necessary, so that future anticipated needs can be accommodated.

12.6 Recommendations in Respect of the Council's Future Retail & Commercial Leisure Strategy

12.6.1 Town centre strategies in the borough council area need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. As set out in Section 3 of this study the key purpose of the town centre strategies should be to build on the existing individuality of centres, be a focus/hub for their communities, attract a mix of additional land uses beyond retail/leisure, (including residential, educational, community and office uses) and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

12.6.2 The recommended key retail and commercial leisure elements to each town centre strategy, as a result of the findings of this study, are set out below:

Sittingbourne Town Centre

- Maintain, and where possible, strengthen the town centre's mix of multiple and independent occupiers.
- Investigate site/unit opportunities to meet the commercial leisure and retail needs identified in this study. In doing so it will be important to take into account the need to attract a mix of additional land uses (most notably offices and residential) beyond retail/leisure to the town centre.
- Continue to engage with The Spirit of Sittingbourne team to seek the full letting of retail/leisure units proposed in the redevelopment scheme and that the overall mixed-use scheme is fully realised.
- Develop a marketing strategy to seek to improve the perception of the town centre. The marketing strategy should provide an assessment to understand potential options for further promoting existing facilities and improving marketing.
- Undertake a Parking Strategy for the Town Centre to assess whether the provision of car parks in the town meets with current and future demand. If there is a potential over supply, consider options for redeveloping for alternative uses which would support the town centre as a community hub.
- Undertake a Public Realm Assessment to investigate potential opportunities to improve the quality of the town centre environment.

Faversham Town Centre

- Identify site/unit opportunities to meet the identified (albeit limited) comparison retail goods and health and fitness needs. Again, in doing so it will be important to take into account the need to attract uses beyond retail/leisure to the town centre to enhance its role as a community hub.
- Embrace the strong independent offering in the town centre and where possible seek to enhance it, particularly the comparison goods offer.
- Undertake a review of the town centre market to ascertain whether there are potential opportunities of enhancing/promoting it.
- Investigate ways to improve the pedestrian linkage (Preston Street) between the primary shopping area and the railway station.

Sheerness Town Centre

- Investigate site/unit opportunities to meet the identified (albeit limited) comparison retail goods, restaurant, and health and fitness needs. Again, like the other two town centres, in doing so it will be important to take into account the need to attract uses beyond retail/leisure to the town centre to enhance its role as a community hub.
- Consult with owners of properties which currently detract from the environmental quality of the centre to establish potential opportunities for their enhancements.
- Undertake a public realm improvement study to investigate potential opportunities to improve the quality of the town centre environment including consideration to part pedestrianisation/ pedestrian priority zones and public realm improvements/linkages by the railway station. It will be important to engage with stakeholders, town centre occupiers and residents.
- Undertake annual monitoring composition checks of the town centre to make sure the number of takeaway outlets does not have a negative impact on its vitality and viability.

12.6.3 In addition to the above, the Council, in partnership with its stakeholders, should continue to promote the town centres in the Borough (particularly through the internet (e.g. www.Faversham.org)) as not just places to shop and eat/drink but also places to work, stay and live.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
CTN	Shops selling Confectionary, Tobacco and newspapers
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	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.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count

	for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	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.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2016; all prices are or have been adjusted to 2016 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.

Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of 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.