Swale Borough Council

Retail and Leisure Needs Assessment

December 2018

Volume 2 of 2 – Appendices




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Appendices

Appendix A

Experian Mosaic Summary

Mosaic UK
Classifications

A City Prosperity	A01	World-Class Wealth	Global high flyers and families of privilege living luxurious lifestyles in London's most exclusive boroughs
	A02	Uptown Elite	High status households owning elegant homes in accessible inner suburbs where they enjoy city life in comfort
	A03	Penthouse Chic	City suits renting premium-priced flats in prestige central locations where they work hard and play hard
	A04	Metro High-Flyers	Ambitious 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities
B Prestige Positions	B05	Premium Fortunes	Influential families with substantial income established in distinctive, expansive homes in wealthy enclaves
	B06	Diamond Days	Retired residents in sizeable homes whose finances are secured by significant assets and generous pensions
	B07	Alpha Families	High-achieving families living fast-track lives, advancing careers, finances and their school-age kids' development
	B08	Bank of Mum and Dad	Well-off families in upmarket suburban homes where grown-up children benefit from continued financial support
	B09	Empty-Nest Adventure	Mature couples in comfortable detached houses who have the means to enjoy their empty-nest status
C Country Living	C10	Wealthy Landowners	Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners
	C11	Rural Vogue	Country-loving families pursuing a rural idyll in comfortable village homes while commuting some distance to work
	C12	Scattered Homesteads	Older households appreciating rural calm in stand-alone houses within agricultural landscapes
	C13	Village Retirement	Retirees enjoying pleasant village locations with amenities to service their social and practical needs
D Rural Reality	D14	Satellite Settlers	Mature households living in expanding developments around larger villages with good transport links
	D15	Local focus	Rural families in affordable village homes who are reliant on the local economy for jobs
	D16	Outlying Seniors	Pensioners living in inexpensive housing in out of the way locations
	D17	Far-Flung Outposts	Inter-dependent households living in the most remote communities with long travel times to larger towns

E Senior Security	E18	Legacy Elders	Time-honoured elders now mostly living alone in comfortable suburban homes on final salary pensions
	E19	Bungalow Haven	Peace-seeking seniors appreciating the calm of bungalow estates designed for the elderly
	E20	Classic Grandparents	Lifelong couples in standard suburban homes enjoying retirement through grandchildren and gardening
	E21	Solo Retirees	Senior singles whose reduced incomes are satisfactory in their affordable but pleasant owned homes
F Suburban Stability	F22	Boomerang Boarders	Long-term couples with mid-range incomes whose adult children have returned to the shelter of the family home
	F23	Family Ties	Active families with teens and adult children whose prolonged support is eating up household resources
	F24	Fledgling Free	Pre-retirement couples with respectable incomes enjoying greater space and spare cash since children left home
	F25	Dependable Me	Single mature owners settled in traditional suburban semis working in intermediate occupations
G Domestic Success	G26	Cafés and Catchments	Affluent families with growing children living in upmarket housing in city environs
	G27	Thriving Independence	Well-qualified older singles with incomes from successful professional careers in good quality housing
	G28	Modern Parents	Busy couples in modern detached homes juggling the demands of school-age children and careers
	G29	Mid-Career Convention	Professional families with children in traditional mid-range suburbs where neighbours are often older
H Aspiring Homemakers	H30	Primary Ambitions	Forward-thinking younger families who sought affordable homes in good suburbs which they may now be out-growing
	H31	Affordable Fringe	Settled families with children owning modest, 3-bed semis in areas where there's more house for less money
	H32	First-Rung Futures	Pre-family newcomers who have bought value homes with space to grow in affordable but pleasant areas
	H33	Contemporary Starts	Fashion-conscious young singles and partners setting up home in developments attractive to their peers
	H34	New Foundations	Occupants of brand new homes who are often younger singles or couples with children
	H35	Flying Solo	Bright young singles on starter salaries choosing to rent homes in family suburbs

Mosaic UK
Classifications

I Family Basics	I36	Solid Economy	Stable families with children renting better quality homes from social landlords
	I37	Budget Generations	Families supporting both adult and younger children where expenditure can exceed income
	I38	Childcare Squeeze	Younger families with children who own a budget home and are striving to cover all expenses
	I39	Families with Needs	Families with many children living in areas of high deprivation and who need support
J Transient Renters	J40	Make Do & Move On	Yet to settle younger singles and couples making interim homes in low cost properties
	J41	Disconnected Youth	Young people endeavouring to gain employment footholds while renting cheap flats and terraces
	J42	Midlife Stopgap	Maturing singles in employment who are renting short-term affordable homes
	J43	Renting a Room	Transient renters of low cost accommodation often within subdivided older properties
K Municipal Challenge	K44	Inner City Stalwarts	Long-term renters of inner city social flats who have witnessed many changes
	K45	Crowded Kaleidoscope	Multi-cultural households with children renting social flats in over-crowded conditions
	K46	High Rise Residents	Renters of social flats in high rise blocks where levels of need are significant
	K47	Streetwise Singles	Hard-pressed singles in low cost social flats searching for opportunities
	K48	Low Income Workers	Older social renters settled in low value homes in communities where employment is harder to find
L Vintage Value	L49	Dependent Greys	Ageing social renters with high levels of need in centrally located developments of small units
	L50	Pocket Pensions	Penny-wise elderly singles renting in developments of compact social homes
	L51	Aided Elderly	Supported elders in specialised accommodation including retirement homes and complexes of small homes
	L52	Estate Veterans	Longstanding elderly renters of social homes who have seen neighbours change to a mix of owners and renters
	L53	Seasoned Survivors	Deep-rooted single elderly owners of low value properties whose modest home equity provides some security

M Modest Traditions	M54	Down-to-Earth Owners	Ageing couples who have owned their inexpensive home for many years while working in routine jobs
	M55	Offspring Overspill	Lower income owners whose adult children are still striving to gain independence meaning space is limited
	M56	Self Supporters	Hard-working mature singles who own budget terraces manageable within their modest wage
N Urban Cohesion	N57	Community Elders	Established older households owning city homes in diverse neighbourhoods
	N58	Cultural Comfort	Thriving families with good incomes in multi-cultural urban communities
	N59	Asian Heritage	Large extended families in neighbourhoods with a strong South Asian tradition
	N60	Ageing Access	Older residents owning small inner suburban properties with good access to amenities
O Rental Hubs	O61	Career Builders	Motivated singles and couples in their 20s and 30s progressing in their field of work from commutable properties
	O62	Central Pulse	Entertainment-seeking youngsters renting city centre flats in vibrant locations close to jobs and night life
	O63	Flexible Workforce	Self-starting young renters ready to move to follow worthwhile incomes from service sector jobs
	O64	Bus-Route Renters	Singles renting affordable private flats away from central amenities and often on main roads
	O65	Learners & Earners	Inhabitants of the university fringe where students and older residents mix in cosmopolitan locations
	O66	Student Scene	Students living in high density accommodation close to universities and educational centres

Appendix B
Vitality and Viability
Health Check Methodology

1.0 NPPG Health Check Methodology

1.1 Introduction

1.1.1 This appendix contains the methodology for undertaking the vitality and viability health checks in line with national retail planning policy.

1.2 National Planning Policy Framework (NPPF)

1.2.1 The 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.

1.2.2 The NPPF identifies a number of factors which are of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 85 of the NPPF states that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaption. Paragraph 85 also requires planning policies to promote the long-term viability and vitality of town centres. It notes this should be achieved 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.

1.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

1.3.1 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.

1.2.3 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria have been published in the NPPG. 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. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- Diversity of uses – data on the diversity of uses was collated during fieldwork in May 2018.
- Proportion of vacant street level property – vacant properties were also identified during the undertaking of on-site surveys.
- Retailer representation – information on the current strength of the defined centres, retailer representation and retailer requirements has been derived from on-site surveys and various published sources.
- Commercial rents – where available rental data has been sourced from recognised UK property consultants.
- Pedestrian flows – general footfall and pedestrian flows were also observed during WYG's on-site surveys.
- Accessibility – consideration of access to and around the centres is informed by WYG's on-site surveys.
- Perceptions of safety and occurrence of crime – informed by our observations and initiatives present in each centre.
- Views and behaviour – Information on views is based on the NEMS household survey results and feedback from key stakeholders.
- State of town centre environmental quality – consideration of the quality of the buildings and public realm in the centre has also been informed by WYG's 'on the ground' observations.

1.4 Swale Borough Health Checks

1.4.1 For the purposes of this Study, the health check assessments are based on the Experian Goad boundary area of the town centres (surveys undertaken by Experian in September 2018). The use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data. It should however be noted that the Goad Plan boundaries differ slightly to the adopted town centre boundaries and cover slightly larger areas.

Appendix C

Experian Goad Land Use Plan - Sittingbourne Town Centre

SITTINGBOURNE
SURVEYED: 10 SEPTEMBER 2018

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SCALE 1:1000

0 12.5 25 37.5 50 m

Goad Paper Plans are for identification only and not to be scaled as a working drawing.

Mapping sourced from Ordnance Survey

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Appendix D
Experian Goad Land Use Plan - Faversham Town Centre

FAVERSHAM

SURVEYED: 10 SEPTEMBER 2018

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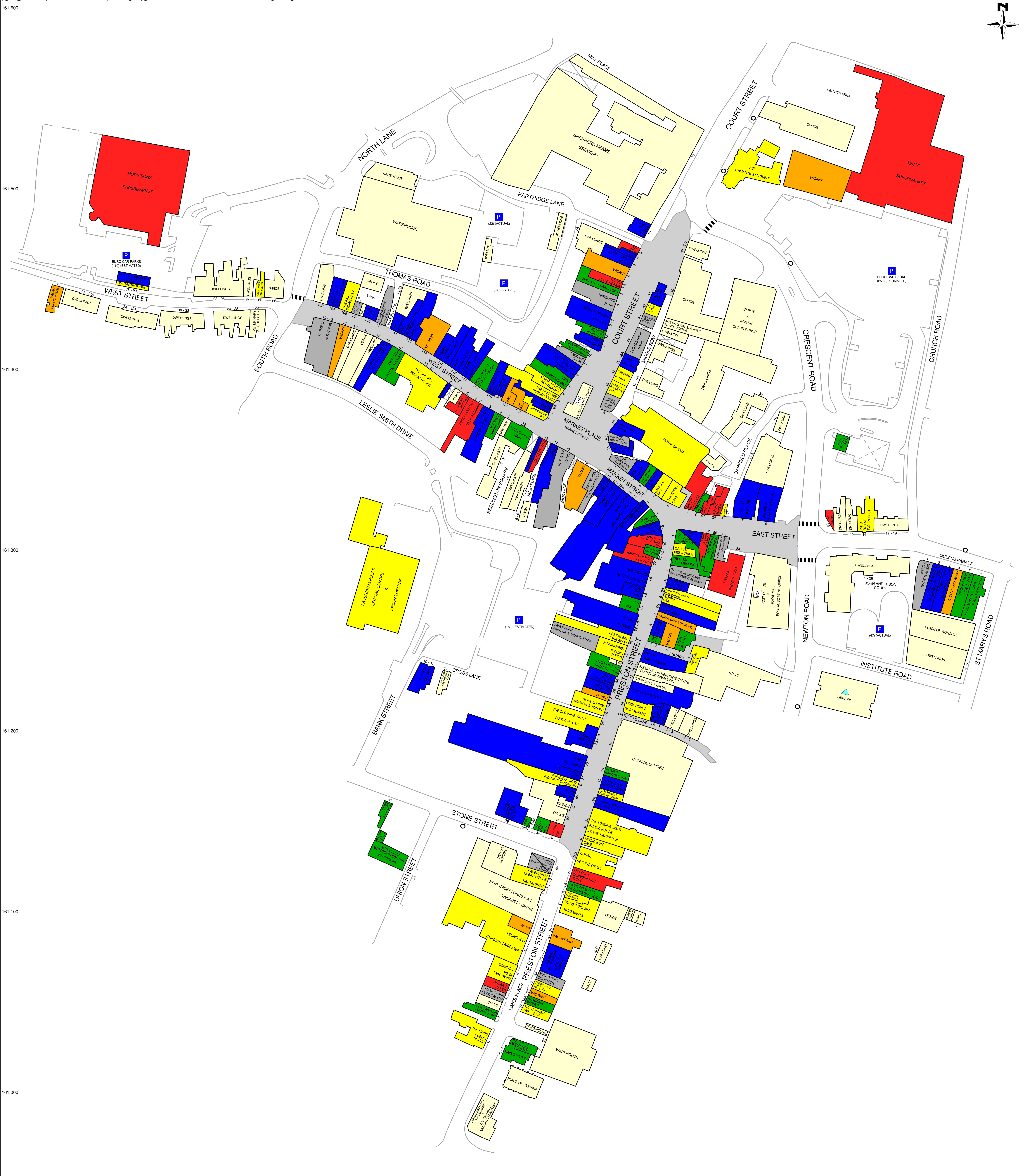

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Goad Paper Plans are for identification only and not to be scaled as a working drawing.
Mapping sourced from Ordnance Survey

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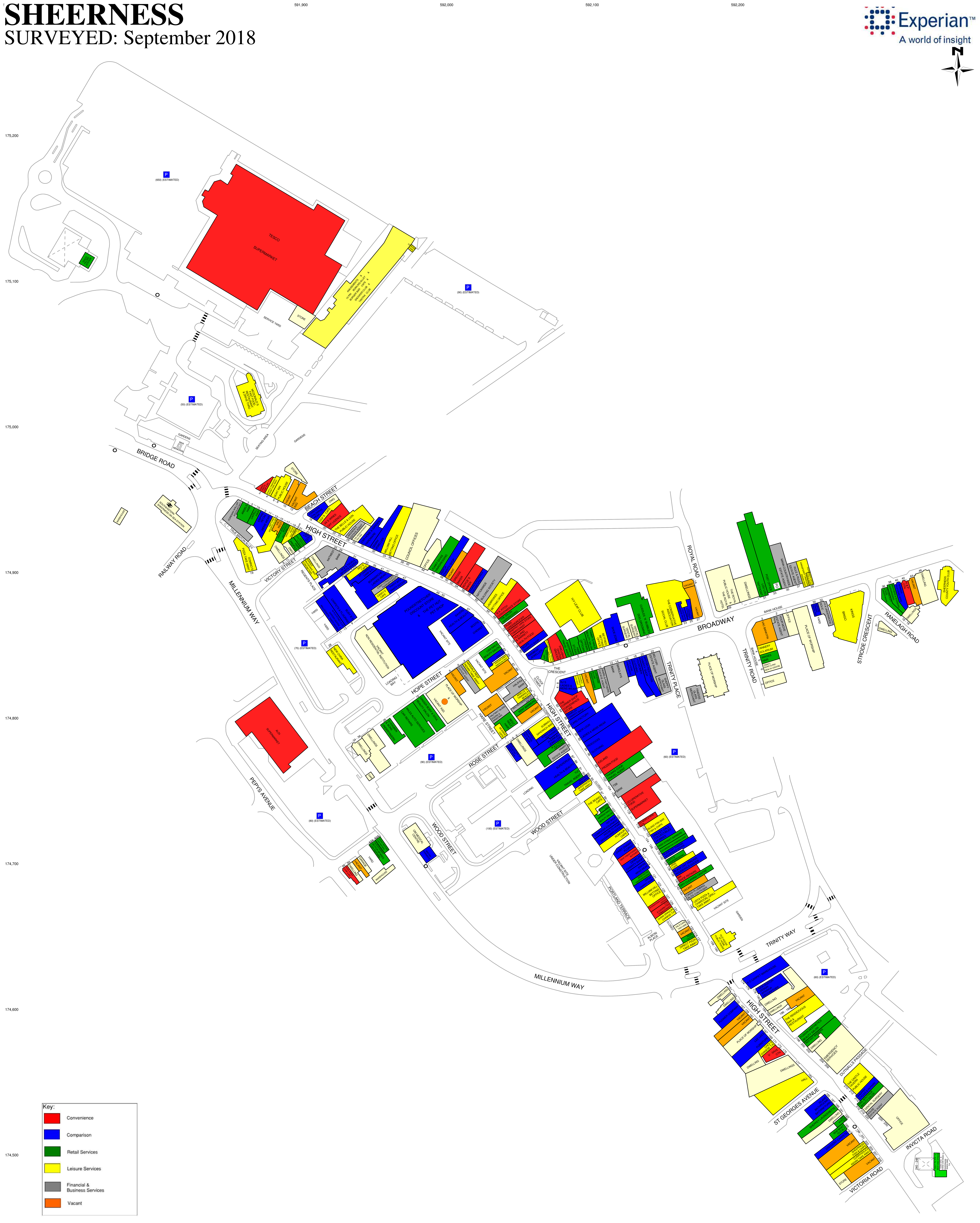
Appendix E

Experian Goad Land Use Plan - Sheerness Town Centre

SHEERNESS
SURVEYED: September 2018



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Appendix F

Local Centre Health Checks

Centre – Boughton-under-Blean Local Centre

No. of Units

Sector	No. of Units
Convenience	1
Comparison	0
Retail Service	2
Leisure Service	3
Financial & Business Service	0
Other	0
Vacant	1
Total	**7**

Comments

Retailer/Leisure Representation – Boughton-under-Blean is a small linear centre serving a local catchment in the far east of the Borough. The centre provides 7 retail/leisure units including a small convenience store (Village Store), two hair and beauty salons/hairdressers, a café, and two public houses. The retail/leisure units are generally interspersed with residential dwellings.

Pedestrian Activity – At the time of our visits reasonable footfall was observed in the vicinity of the Village Store. Lower levels of footfall were observed towards the western end of the centre.

Vacancy Rate – At the current time the centre contained just one vacant unit: the former Garden Hotel and Vines Restaurant. The reasonably large unit has been vacant for a period of time and detracts from the environmental quality of this part of the centre

Accessibility – Car parking is limited to on-street parking only although a small private car park is provided for patrons of The Queens Head public house. Bus stops are situated along The St providing services to Sittingbourne, Faversham, and Canterbury. No cycle parking appears to be provided in the centre.

Environmental Quality – The environmental quality of the centre is generally considered to be good albeit it is slightly marred by through traffic. There was no evidence of graffiti or litter at the time of our visits and, with the exception of the former Garden Hotel and Vines Restaurant, shop fronts are well maintained.

Summary – A small linear centre serving a local catchment, Boughton-under-Blean is considered to be in reasonably good health when considered against relevant vitality and viability indicators.

Centre –Halfway Houses

No. of Units

Sector	No. of Units
Convenience	2
Comparison	11
Retail Service	2
Leisure Service	13
Financial & Business Service	1
Other	2
Vacant	1
Total	**32**

Comments

Retailer/Leisure Representation – Halfway Houses is a local centre located at the junction of Minster Road, Halfway Road, The Crescent and Queenborough Road. It benefits from being on a main route and serves both the local community and a wider catchment. Providing some 32 units Halfway House is one of the larger local centres in the Borough. For a local centre, comparison goods retail and leisure service uses are reasonably well represented with a large number of takeaways and restaurants along with several hairdressers, barbershops and a nail salon. Comparison goods retailers include a car spares centre, DIY & trade shop and tyre garage. The centre also provides two convenience shops: Premier Off Licence and a Costcutter convenience store.

Pedestrian Activity – At the time of our visits, the highest footfall was observed on the corner of Minster Road and Halfway Road, outside the Costcutter store. The lowest levels of footfall were monitored along The Crescent.

Vacancy Rate – Only one vacant unit was recorded at the time of our visit.

Accessibility – A good level of free car parking is provided by a 41-space car park accessed off Minster Road. Limited off-street parking is provided on surrounding streets. Bus services stopping along Halfway Road and Minster run to Sheerness, Sittingbourne and other nearby settlements. Whilst the centre is accessible on foot from surrounding residential area pedestrian movement/circulation in the centre is hindered by through traffic.

Environmental Quality – The environmental quality of the centre is generally good but is dominated by the Minster Road/Halfway Road traffic light road junction. The majority of shop fronts are well maintained, especially the newly opened Mem's Mezze Restaurant in the old Halfway House pub building. A number of units could benefit from investment/improvements.

Summary –Halfway Houses serves the local community and a wider catchment, overall is considered to display reasonable levels of vitality and viability.

Centre – Leysdown on Sea

No. of Units

Sector	No. of Units
Convenience	2
Comparison	8
Retail Service	1
Leisure Service	16
Financial & Business Service	1
Other	1
Vacant	1
Total	**30**

Comments

Retailer/Leisure Representation – Leysdown on Sea is located on the north east coast of the Isle of Sheppey. The retail/leisure provision in the centre primarily caters for visitors/tourists and is well served by leisure and comparison goods uses. The centre is mainly formed of amusement arcades, cafes, pubs and restaurants along The Promenade with other uses, including an estate agent, Kent Mart convenience store, William Hill bookmakers and several gift shops amongst others, situated along Leysdown Road. With the exception of William Hill and a Premier Convenience store, the centre is made up of local and independent shops and businesses.

Pedestrian Activity – Pedestrian activity in the centre varies depending on the time of the year. Whilst low levels of footfall were recorded at the time of visit, which was undertaken in off-peak holiday season time, pedestrian footfall/activity is understood to be healthy during the peak holiday season.

Vacancy Rate – One vacant unit was observed at the time of our visit, a former off-licence.

Accessibility – A large pay and display car park providing 272 spaces is located off The Promenade and 2 other car parks within the centre offer limited free parking.

Environmental Quality – The environmental quality of the centre is considered to be mixed. The environmental quality of the centre benefits from The Spinney park/garden on the western side of The Promenade, however, several of the shops along Leysdown Road showed signs of needing maintenance. There was no evidence of litter, graffiti or vandalism in the centre at the time of our visit.

Summary – Leysdown on Sea's vitality and viability varies primarily due to its function as a visitor/tourist destination. The lack of footfall and activity during off-peak periods of the year impacts on the vibrancy of the centre. The level of services/shops serving the centre is considered reasonable given its catchment size.

Centre –Milton Regis		**No. of Units**
		

Sector	No. of Units
Convenience	1
Comparison	8
Retail Service	7
Leisure Service	7
Financial & Business Service	0
Other	4
Vacant	3
Total	**30**

Comments

Retailer/Leisure Representation – Milton Regis Local Centre is situated approximately 1km north of Sittingbourne Town Centre and serves the residential areas surrounding it. It has a linear form that primarily extends along the High Street. With the exception of McColls convenience store and Lloyds Pharmacy all operators are independents. Comparison goods retailers include a kitchen and bathroom shop, a carpet retailer, a women's clothing store and several small shops selling a variety of goods. Retail service providers include 2 barber shops, a dog grooming parlour, a tattooist and a mobile phone repair shop. Leisure service include a public house and several fast food/takeaway operators. The centre also contains the attractive 15th Century Court Hall Museum which is open from April through to September.

Pedestrian Activity – Pedestrian activity was primarily centred around the central car park and the McColls convenience store.

Vacancy Rate – Three units were recorded as vacant at the time of our visit with the unit next to the Happiness Inn being most notable.

Accessibility – A small central car park provides 10 pay and display spaces with other parking available in bays along High Street and along Brewery Road. Buses to Sheerness, Sittingbourne and other surrounding towns are available from bus stops along High Street. Generally pedestrian movement in the centre is considered to be good with a conveniently located pedestrian crossing located on the High Street. A number of cycle parking hoops are also provided in the centre assisting usability of the centre by bike.

Environmental Quality – An attractive historic centre with Court Hall Museum providing an attractive focal point. The centre benefits from street furniture including bins and benches. A number of trees are also present which contribute to its environmental quality.

Summary –Milton Regis serves a predominantly local catchment and is considered to be a healthy centre. It displays reasonably good levels of vitality and viability but would benefit from the re-occupation of the three vacant units.

Centre – Eastchurch

No. of Units

Sector	No. of Units
Convenience	2
Comparison	1
Retail Service	2
Leisure Service	2
Financial & Business Service	0
Other	1
Vacant	1
Total	**9**

Comments

Retailer/Leisure Representation – Located off the B2231, Rowetts Way, Eastchurch is a compact linear centre with retail/service offerings interspersed with residential dwellings along High Street. The centre offers two convenience stores, Londis and Costcutter. Other uses include two hairdressers, The Shurland Hotel restaurant, bar gym & spa, The Castle Inn, a tyre centre and a surgery/medical centre.

Pedestrian Activity – Reasonable levels of footfall were observed across the centre.

Vacancy Rate – One vacant unit was observed at the time of our visit, a former newsagent located next to the doctor’s surgery.

Accessibility – Car parking provision is limited to on-street parking along High Street although the Castle Inn and The Shurland Hotel both have reasonably sized private car parks. Busses to Sheerness, Leysdown, Sittingbourne and Minster are available from nearby bus stops.

Environmental Quality – The centre was generally attractive and well presented at the time of our visits. The majority of shop fronts were well maintained and there was no evidence of litter or graffiti.

Summary –Eastchurch is a small local centre offering important local facilities for its catchment. Overall, the centre is considered to be in reasonably good health.

Centre – Minster

No. of Units

Sector	No. of Units
Convenience	3
Comparison	3
Retail Service	1
Leisure Service	3
Financial & Business Service	0
Other	3
Vacant	0
Total	**13**

Comments

Retailer/Leisure Representation – Minster Local Centre is located at the junction of Minster Road and The Broadway and serves a relatively wide catchment area. Overall, it provides 13 retail/leisure units. A parade of shops along The Broadway comprises a butcher, pharmacy, gift shop, fast food takeaway, fish and chip shop, newsagent and a Londis convenience store. A dentist and veterinary surgery are on the opposite side of the road to the shopping parade and a doctor's surgery is located approximately 35 metres walking distance to the north. To the south, along Minster Road is the Harps Inn public House, a florist and a Costcutter convenience store.

Pedestrian Activity – Reasonable levels of footfall were observed along The Broadway with the highest levels observed outside the Costcutter. Lower levels of pedestrian activity were observed towards the northern end of the centre.

Vacancy Rate – There were no vacant units recorded during our visits.

Accessibility – The centre has a good level of car parking provision for its size with a 15-space car park outside the Costcutter store and florist and on street parking available along The Broadway. Bus stops are situated at the northern extent of the centre on The Broadway and to the south, opposite the Harps Inn. Direct bus services are provided to Sittingbourne, Sheerness, Maidstone and other smaller settlements.

Environmental Quality – Whilst architecturally the centre is not particularly attractive, its environmental quality is generally considered to be reasonable. There was no evidence of graffiti or litter at the time of our visits and the shops were reasonably well maintained.

Summary – Minster serves a relatively wide catchment and benefits from bus services to Sheerness and Sittingbourne. The centre is considered to be vital and viable and performs reasonably well against relevant vitality and viability health check indicators.

Centre –Newington

No. of Units

Sector	No. of Units
Convenience	1
Comparison	1
Retail Service	0
Leisure Service	3
Financial & Business Service	3
Other	0
Vacant	2
Total	**10**

Comments

Retailer/Leisure Representation – Newington is a small linear centre located on the busy A2 road to the west of Sittingbourne. The centre serves a localised catchment is anchored by a small Coop convenience store and offers a public house, a Chinese and an Indian take-away. The financial and business service sector is represented by two estate and letting agencies and an accountancy office whilst the comparison goods sector is represented by Newington Pharmacy.

Pedestrian Activity – At the time of our visits, footfall was relatively low with the most activity observed outside of the Coop convenience store.

Vacancy Rate – There were two vacant units in Newington at the time of our visits.

Accessibility – Pedestrian movements are restricted due to narrow pavements and the busy main road. There is very limited parking space within the centre and although some on street parking is available on side roads, a lack of public parking space limits accessibility. Newington is served by a railway station however, with services to London Victoria and Dover Priory.

Environmental Quality – The environmental quality of the centre is marred by through traffic using the A2. However, most of the units within the centre are well maintained with several well-preserved historic buildings being present

Summary – Overall, Newington Local Centre demonstrates a reasonable level of vitality and viability. As a small centre, it serves a localised catchment area. A good range of services is provided but its environmental quality can suffer during peak traffic periods due to through traffic using the A2.

Centre – Iwade Local Centre

No. of Units

Sector	No. of Units
Convenience	1
Comparison	1
Retail Service	1
Leisure Service	2
Financial & Business Service	0
Other	1
Vacant	0
Total	**6**

Comments

Retailer/Leisure Representation – This modern purpose-built centre to the north of Sittingbourne provides 6 retail/leisure units and serves a small, local catchment. The centre is anchored by a Nisa Local store and provides a pharmacy, health and beauty salon, takeaway outlet and a café. A nursery/pre-school is also located in the centre albeit accessed directly from School Mews. A separate Costcutter store is also located approximately 100 metres walking distance to the south of the centre off Ferry Road.

Pedestrian Activity – At the time of our visits pedestrian activity was monitored to be reasonably low albeit the School Mews car park was fully occupied. The highest levels of footfall were observed in the vicinity of the Nisa Local store.

Vacancy Rate – There were no vacant units recorded at the time of our visits.

Accessibility – The centre is easily accessible on foot from the surrounding residential area with drop kerb crossings provided on both School Lane and The St. In terms of parking, a 25 space car park is provided off School Mews with a number of on-street spaces also provided on School Mews. Cycle parking is also provided at the junction of School Lane/The St, albeit it was not being used at the time of our visits. The centre benefits from bus stops on Ferry Road which provide half hourly peak/hourly off-peak services to Sheerness and Sittingbourne.

Environmental Quality – The centre provides a modern attractive environment configured around a square. The public realm and shop fronts are well maintained with the centre providing a pedestrian friendly environment. There was no evidence of litter or graffiti at the time of our visits.

Summary – Iwade serves a small local catchment to the north of Sittingbourne. Overall, it is considered to display goods levels of vitality and viability.

Centre –Teynham

No. of Units

Sector	No. of Units
Convenience	2
Comparison	8
Retail Service	4
Leisure Service	5
Financial & Business Service	1
Other	4
Vacant	1
Total	**24**

Comments

Retailer/Leisure Representation – Linear in nature and arranged on either side of the A2, Teynham Local Centre provides a reasonably good range of local services that serve the village and its surrounding rural hinterland. Units are interspersed with housing and it is evident that several former shops have undergone conversion to dwellings. Comparison goods units include a reptile and aquatics shop, an antiques centre and a model shop whilst retail services include barber shops, laundry services and a denture centre. A Co-op store and a Costcutter provide the convenience goods retail offer while leisure services are provided by 3 public houses: The Swan; The George & New Territories and; The Dover Castle Inn. In addition to these pubs, the centre also provides a Chinese takeaway and a fish and chip restaurant/takeaway.

Pedestrian Activity – At the time of our visit, footfall was reasonably low across the centre with the busiest areas observed to be outside the Co-op store and outside Crispins Fish Bar.

Vacancy Rate – An empty unit next to the Costcutter store was the only vacancy observed at the time of our visit.

Accessibility – Limited on-road parking is available but customer car parks are provided by the public houses and by Crispins Fish Bar. The Local Centre benefits from a railway station (800 walking distance metres to north) with trains running to London and Dover. Bus stops provide services to Canterbury and Faversham to the east, and Sittingbourne and Maidstone to the west.

Environmental Quality – The environmental quality of the centre is generally good although it is somewhat marred at times by through traffic using the A2. The vacant retail unit next to Costcutter also slightly detracts from this part of the centre with the unit in need of refurbishment/investment.

Summary –Teynham serves local residents and the surrounding rural hinterland. It demonstrates reasonably good levels of vitality and viability.

Appendix G

Statistical Retail Tables - Population and Expenditure

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 1: Population Growth, by Zone

Zone	2016	2019	2024	2029	2034	2038	Change 2019-2024		Change 2019-2029		Change 2019-2034		Change 2019-2038	
							No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]	[14]
1 - Isle of Sheppey	45,025	46,412	48,688	50,710	52,477	53,860	2,276	4.9	4,298	9.3	6,065	13.1	7,448	16.0
2 - Borough West	14,452	15,004	15,864	16,664	17,429	17,928	860	5.7	1,660	11.1	2,425	16.2	2,924	19.5
3 - Sittingbourne	50,299	51,966	54,889	57,618	60,297	62,312	2,923	5.6	5,652	10.9	8,331	16.0	10,346	19.9
4 - Central Borough	11,140	11,519	12,139	12,664	13,110	13,520	620	5.4	1,145	9.9	1,591	13.8	2,001	17.4
5 - Faversham	20,193	20,833	21,857	22,789	23,601	24,175	1,024	4.9	1,956	9.4	2,768	13.3	3,342	16.0
6 - Borough East	5,411	5,612	5,921	6,219	6,492	6,693	309	5.5	607	10.8	880	15.7	1,081	19.3
Total	**146,520**	**151,346**	**159,358**	**166,664**	**173,406**	**178,488**	**8,012**	**5.3**	**15,318**	**10.1**	**22,060**	**14.6**	**27,142**	**18.1**

Notes:
[1] 2016 base population figure provided by Experian Retail Planner Area Profile Report for each zone (2011 Census)
[2], [3], [4], [5], [6] Population projection figures presently taken from Experian Retail Planner Area Profile Report for each zone (2011 Census)
[7] = [3] - [2]
[8] = [7] / [2]
[9] = [4] - [2]
[10] = [9] / [2]
[11] = [5] - [2]
[12] = [11] / [2]
[13] = [6] - [2]
[14] = [13] / [2]

Table 2: Per Capita Convenience Goods Expenditure, by Zone (£)

Zone	2019	2024	2029	2034	2038
1 - Isle of Sheppey	2,019	2,008	2,005	2,009	2,013
2 - Borough West	2,288	2,276	2,273	2,277	2,282
3 - Sittingbourne	1,934	1,924	1,921	1,925	1,929
4 - Central Borough	2,323	2,311	2,308	2,312	2,316
5 - Faversham	1,995	1,984	1,982	1,986	1,989
6 - Borough East	2,359	2,346	2,343	2,348	2,352

Notes
Per capita expenditure derived from Experian MMG3 data (November 2018)
Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 15
Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 15

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 3: Total Available Convenience Expenditure, by Zone (£m)

Zone	2019	2024	2029	2034	2038	Change 2019-24		Change 2019-29		Change 2019-34		Change 2019-38	
						No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]
1 - Isle of Sheppey	93.7	97.8	101.7	105.4	108.4	4.1	4.3	8.0	8.5	11.7	12.5	14.7	15.7
2 - Borough West	34.3	36.1	37.9	39.7	40.9	1.8	5.2	3.5	10.3	5.4	15.6	6.6	19.2
3 - Sittingbourne	100.5	105.6	110.7	116.1	120.2	5.1	5.1	10.2	10.1	15.6	15.5	19.7	19.6
4 - Central Borough	26.8	28.0	29.2	30.3	31.3	1.3	4.8	2.5	9.2	3.6	13.3	4.6	17.0
5 - Faversham	41.6	43.4	45.2	46.9	48.1	1.8	4.4	3.6	8.7	5.3	12.7	6.5	15.7
6 - Borough East	13.2	13.9	14.6	15.2	15.7	0.7	4.9	1.3	10.1	2.0	15.1	2.5	18.9
Total	**310.1**	**324.8**	**339.2**	**353.6**	**364.6**	**14.7**	**4.7**	**29.2**	**9.4**	**43.5**	**14.0**	**54.6**	**17.6**

Notes
[1] to [5] Calculated by multiplying population (Table 1) by per capita convenience goods expenditure (Table 2)
[6] = [2] - [1]
[7] = [2] / [1]
[8] = [3] - [1]
[9] = [3] / [1]
[10] = [4] - [1]
[11] = [4] / [1]
[12] = [5] - [1]
[13] = [5] / [1]

2016 Prices

Table 4a - Per Capita Comparison Goods Expenditure, by Category, 2016 (£)

Zone	Expenditure Category										Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	759	144	130	185	102	465	336	71	245	137	175	2,749
2 - Borough West	964	215	196	274	175	633	447	81	371	206	243	3,807
3 - Sittingbourne	819	146	138	204	138	477	361	73	261	140	190	2,947
4 - Central Borough	835	210	186	247	159	623	390	85	358	214	224	3,530
5 - Faversham	825	159	142	223	145	478	377	78	276	148	200	3,052
6 - Borough East	851	228	192	275	149	635	403	80	365	218	232	3,629

Table 4b - Per Capita Comparison Goods Expenditure, by Category, 2019 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	800	151	137	195	108	490	355	75	258	144	184	2,897
2 - Borough West	1,016	227	207	289	184	667	471	86	391	217	256	4,011
3 - Sittingbourne	863	154	145	215	145	503	380	77	275	148	201	3,105
4 - Central Borough	880	221	196	260	168	656	411	89	377	225	236	3,720
5 - Faversham	870	168	149	235	153	504	397	82	291	156	211	3,216
6 - Borough East	897	241	202	290	157	669	425	85	385	230	244	3,824

Table 4c: Per Capita Comparison Goods Expenditure, by Category, 2024 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	911	172	156	222	122	558	404	85	294	164	210	3,297
2 - Borough West	1,157	258	236	329	210	759	536	98	445	247	292	4,566
3 - Sittingbourne	983	175	165	245	165	573	433	87	313	168	228	3,535
4 - Central Borough	1,001	252	223	296	191	747	468	102	430	256	269	4,234
5 - Faversham	990	191	170	268	174	574	452	93	331	177	240	3,660
6 - Borough East	1,021	274	230	330	178	762	483	96	438	261	278	4,352

Table 4d: Per Capita Comparison Goods Expenditure, by Category, 2029 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	1,062	201	181	259	143	651	470	99	342	191	244	3,843
2 - Borough West	1,348	301	274	383	244	885	625	114	519	288	340	5,322
3 - Sittingbourne	1,145	204	192	285	192	667	504	102	365	196	266	4,120
4 - Central Borough	1,167	294	260	345	222	871	545	118	501	299	313	4,935
5 - Faversham	1,154	222	198	312	203	669	527	109	386	207	279	4,266
6 - Borough East	1,190	319	268	385	208	888	563	112	510	305	324	5,072

Table 4e: Per Capita Comparison Goods Expenditure, by Category, 2034 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	1,243	235	212	303	167	762	551	116	401	224	286	4,500
2 - Borough West	1,579	353	321	449	286	1,037	732	133	608	337	398	6,232
3 - Sittingbourne	1,341	239	225	334	225	782	591	119	428	229	312	4,825
4 - Central Borough	1,367	344	304	404	261	1,020	639	139	586	350	367	5,779
5 - Faversham	1,351	261	232	365	238	783	617	127	452	242	327	4,996
6 - Borough East	1,393	374	314	450	244	1,039	660	132	598	357	380	5,940

Table 4f: Per Capita Comparison Goods Expenditure, by Category, 2038 (£)

Zone	Expenditure Category											Total
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	Per Capita Expenditure
1 - Isle of Sheppey	1,411	267	241	344	190	865	625	132	455	254	325	5,108
2 - Borough West	1,792	400	365	510	325	1,177	831	151	690	383	452	7,074
3 - Sittingbourne	1,522	272	256	379	256	887	670	135	485	260	354	5,476
4 - Central Borough	1,551	391	346	458	296	1,157	725	158	665	397	416	6,560
5 - Faversham	1,533	296	264	415	270	889	701	145	513	275	371	5,671
6 - Borough East	1,582	424	357	511	276	1,180	749	149	678	405	431	6,743

Notes
2016 base expenditure taken from Experian MMG3 data (November 2018)
Comparison goods expenditure growth projected forward from 2016 base using the growth rates in Appendix 3 of Experian Retail Planner Briefing Note 15 .
Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 15.
2016 prices

Table 5a: Total Comparison Goods Expenditure, by Category, 2019 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - Isle of Sheppey	37.1	7.0	6.3	9.1	5.0	22.8	16.5	3.5	12.0	6.7	8.5
2 - Borough West	15.2	3.4	3.1	4.3	2.8	10.0	7.1	1.3	5.9	3.3	3.8
3 - Sittingbourne	44.9	8.0	7.5	11.2	7.5	26.1	19.8	4.0	14.3	7.7	10.4
4 - Central Borough	10.1	2.6	2.3	3.0	1.9	7.6	4.7	1.0	4.3	2.6	2.7
5 - Faversham	18.1	3.5	3.1	4.9	3.2	10.5	8.3	1.7	6.1	3.2	4.4
6 - Borough East	5.0	1.4	1.1	1.6	0.9	3.8	2.4	0.5	2.2	1.3	1.4
Total	**130.5**	**25.8**	**23.5**	**34.1**	**21.3**	**80.7**	**58.7**	**11.9**	**44.7**	**24.7**	**31.3**

Table 5b: Total Comparison Goods Expenditure, by Category, 2024 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - Isle of Sheppey	44.4	8.4	7.6	10.8	6.0	27.2	19.6	4.1	14.3	8.0	10.2
2 - Borough West	18.4	4.1	3.7	5.2	3.3	12.0	8.5	1.5	7.1	3.9	4.6
3 - Sittingbourne	53.9	9.6	9.1	13.4	9.1	31.4	23.7	4.8	17.2	9.2	12.5
4 - Central Borough	12.2	3.1	2.7	3.6	2.3	9.1	5.7	1.2	5.2	3.1	3.3
5 - Faversham	21.6	4.2	3.7	5.9	3.8	12.5	9.9	2.0	7.2	3.9	5.2
6 - Borough East	6.0	1.6	1.4	2.0	1.1	4.5	2.9	0.6	2.6	1.5	1.6
Total	**156.5**	**31.0**	**28.2**	**40.9**	**25.5**	**96.8**	**70.3**	**14.3**	**53.6**	**29.7**	**37.5**

Table 5c: Total Comparison Goods Expenditure, by Category, 2029 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - Isle of Sheppey	53.8	10.2	9.2	13.1	7.2	33.0	23.9	5.0	17.4	9.7	12.4
2 - Borough West	22.5	5.0	4.6	6.4	4.1	14.7	10.4	1.9	8.6	4.8	5.7
3 - Sittingbourne	66.0	11.8	11.1	16.4	11.1	38.5	29.1	5.9	21.0	11.3	15.3
4 - Central Borough	14.8	3.7	3.3	4.4	2.8	11.0	6.9	1.5	6.3	3.8	4.0
5 - Faversham	26.3	5.1	4.5	7.1	4.6	15.2	12.0	2.5	8.8	4.7	6.4
6 - Borough East	7.4	2.0	1.7	2.4	1.3	5.5	3.5	0.7	3.2	1.9	2.0
Total	**190.7**	**37.7**	**34.3**	**49.8**	**31.1**	**118.0**	**85.7**	**17.5**	**65.3**	**36.2**	**45.7**

Table 5d: Total Comparison Goods Expenditure, by Category, 2034 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - Isle of Sheppey	65.2	12.3	11.1	15.9	8.8	40.0	28.9	6.1	21.0	11.7	15.0
2 - Borough West	27.5	6.1	5.6	7.8	5.0	18.1	12.8	2.3	10.6	5.9	6.9
3 - Sittingbourne	80.9	14.4	13.6	20.2	13.6	47.1	35.6	7.2	25.8	13.8	18.8
4 - Central Borough	17.9	4.5	4.0	5.3	3.4	13.4	8.4	1.8	7.7	4.6	4.8
5 - Faversham	31.9	6.1	5.5	8.6	5.6	18.5	14.6	3.0	10.7	5.7	7.7
6 - Borough East	9.0	2.4	2.0	2.9	1.6	6.7	4.3	0.9	3.9	2.3	2.5
Total	**232.5**	**46.0**	**41.8**	**60.7**	**37.9**	**143.8**	**104.5**	**21.3**	**79.6**	**44.1**	**55.7**

Table 5e: Total Comparison Goods Expenditure, by Category, 2038 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1 - Isle of Sheppey	76.0	14.4	13.0	18.5	10.2	46.6	33.7	7.1	24.5	13.7	17.5
2 - Borough West	32.1	7.2	6.5	9.1	5.8	21.1	14.9	2.7	12.4	6.9	8.1
3 - Sittingbourne	94.9	16.9	15.9	23.6	15.9	55.3	41.8	8.4	30.2	16.2	22.0
4 - Central Borough	21.0	5.3	4.7	6.2	4.0	15.6	9.8	2.1	9.0	5.4	5.6
5 - Faversham	37.1	7.1	6.4	10.0	6.5	21.5	16.9	3.5	12.4	6.6	9.0
6 - Borough East	10.6	2.8	2.4	3.4	1.9	7.9	5.0	1.0	4.5	2.7	2.9
Total	**271.6**	**53.7**	**48.9**	**70.9**	**44.3**	**168.0**	**122.1**	**24.8**	**93.0**	**51.5**	**65.1**

Notes:
Total Expenditure = Population for each zone (Table 1) multiplied by per capita expenditure for each zone (Table 4b-4f)
2016 Prices

Appendix H

Statistical Retail Tables - Convenience Goods Capacity

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 1: Main and Top Up Food Shopping Market Share of Convenience Facilities by Zone, 2019 (%)

	Zone											
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East	
	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up
INSIDE BOROUGH	**99%**	**99%**	**75%**	**88%**	**98%**	**98%**	**97%**	**93%**	**89%**	**95%**	**65%**	**73%**
Sittingbourne Town Centre	**2%**		**25%**	**24%**	**39%**	**35%**	**29%**	**19%**	**4%**		**3%**	**3%**
Sainsbury's, Avenue of Remembrance	1%		15%	14%	19%	13%	9%	14%	0%		0%	1%
Aldi, East Street	1%		7%	6%	15%	9%	18%	6%	3%		3%	2%
Lidl, West Street			2%		3%	6%	2%		0%			
Iceland, High Street				3%	1%	2%	0%					
Other				1%	0%	5%						
Sittingbourne Other	**7%**	**5%**	**34%**	**28%**	**55%**	**57%**	**15%**	**8%**	**1%**		**2%**	**5%**
Asda, Trinity Trading Estate, Mill Way	4%	1%	17%	10%	25%	17%	4%				2%	2%
Morrisons, Mill Way	2%	2%	15%	13%	24%	19%	11%	4%				3%
M&S Foodhall, Sittingbourne Retail Park	0%	2%	1%	2%	1%	3%	1%	1%	1%			
Co-op, Church Road, Murston						8%						
Co-op, Grove Park, Gadby Road			1%		2%	3%						
Co-op, The Parade, Northwood Drive				4%		2%						
Tesco Express, Canterbury Road					4%	6%		3%				
Faversham Town Centre				**1%**	**1%**		**12%**	**19%**	**39%**	**65%**	**36%**	**42%**
Tesco, Crescent Road					1%		12%	12%	38%	39%	36%	32%
Co-op, Forbes Road								2%	0%	16%		7%
Iceland, East Street				1%			0%		1%	5%		
Other								5%		6%	1%	3%
Faversham Other	**0%**		**1%**		**0%**	**1%**	**40%**	**23%**	**46%**	**30%**	**23%**	**21%**
Sainsbury's, Bysing Wood Road			1%		0%	1%	31%	22%	24%	11%	13%	3%
Morrisons, North Lane	0%		0%				9%	1%	21%	19%	10%	9%
Other Faversham							0%		1%		0%	9%
Iwade Local Centre				**2%**								
Newington Local Centre			**1%**	**9%**								
Boughton-under-Blean Local Centre												**1%**
Teynham Local Centre							**1%**	**22%**				
Other			4%	22%		5%		1%			0%	
ISLE OF SHEPPEY												
Sheerness Town Centre	**68%**	**48%**	**7%**	**2%**	**3%**				**0%**			
Tesco, Bridge Road	45%	13%	7%	2%	3%							
Aldi, Millenium Way	21%	26%							0%			
Co-op, High Street		5%										
Iceland, High Street	2%	2%										
Other		2%										
Queenborough Local Centre		**1%**										
Halfway Houses Local Centre		**10%**										
Minster-on-Sea Local Centre		**1%**										
Neats Court Retail Park, Queenborough	**21%**	**24%**	**2%**		**0%**							
Iceland, Neats Court Retail Park		1%										
Morrisons, Neats Court Retail Park	21%	23%	2%		0%							
Other	**1%**	**10%**										
OUTSIDE BOROUGH	**1%**	**1%**	**25%**	**12%**	**2%**	**2%**	**3%**	**7%**	**11%**	**5%**	**35%**	**27%**
Canterbury	0%		1%		1%	1%	1%	2%	3%	3%	15%	5%
Gillingham	0%		16%	6%	0%						1%	
Whitstable			2%				1%	4%	8%	1%	14%	16%
Maidstone			4%	3%	1%							
Rainham			3%	2%								
Ashford							1%				5%	3%
Other Outside Borough	1%	1%	0%	2%	0%	1%	1%	1%				3%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Notes:
Main food market share figure derived from a 50:50 combined figure between Questions 1 & 2, NEMS Household Survey, September 2018
Top-up market share figure derived from Question 5, NEMS Household Survey, May 2018
Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
Figures may not add due to rounding
2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 2: Main and Top Up Food Shopping Turnover of Convenience Facilities, 2019 (£m)

	Zone											
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East	
	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up	Main	Top-up
INSIDE BOROUGH	**80.0**	**12.5**	**21.7**	**4.6**	**84.0**	**14.5**	**22.7**	**3.0**	**32.6**	**4.8**	**7.4**	**1.3**
Sittingbourne Town Centre	**1.8**		**7.3**	**1.3**	**33.3**	**5.2**	**6.8**	**0.6**	**1.5**		**0.4**	**0.1**
Sainsbury's, Avenue of Remembrance	0.7		4.4	0.8	16.4	2.0	2.1	0.4	0.2		0.1	0.0
Aldi, East Street	1.1		2.2	0.3	12.9	1.3	4.2	0.2	1.2		0.3	0.0
Lidl, West Street			0.7		2.8	0.8	0.4		0.1			
Iceland, High Street				0.1	0.9	0.2	0.1					
Other				0.1	0.3	0.8						
Sittingbourne Other	**5.5**	**0.7**	**9.9**	**1.5**	**47.3**	**8.5**	**3.6**	**0.3**	**0.2**		**0.2**	**0.1**
Asda, Trinity Trading Estate, Mill Way	3.4	0.2	5.0	0.5	21.5	2.5	0.8				0.2	0.0
Morrisons, Mill Way	1.8	0.2	4.4	0.7	20.3	2.8	2.6	0.1				0.1
M&S Foodhall, Sittingbourne Retail Park	0.2	0.3	0.4	0.1	0.8	0.4	0.1	0.0	0.2			
Co-op, Church Road, Murston						1.2						
Co-op, Grove Park, Gadby Road			0.2		1.5	0.4						
Co-op, The Parade, Northwood Drive				0.2		0.3						
Tesco Express, Canterbury Road					3.3	0.9		0.1				
Faversham Town Centre				**0.0**	**0.7**		**2.8**	**0.6**	**14.1**	**3.3**	**4.2**	**0.7**
Tesco, Crescent Road					0.7		2.7	0.4	13.7	2.0	4.1	0.6
Co-op, Forbes Road								0.1	0.1	0.8		0.1
Iceland, East Street				0.0			0.1		0.2	0.2		
Other								0.2		0.3	0.1	0.1
Faversham Other	**0.2**		**0.2**		**0.2**	**0.1**	**9.4**	**0.7**	**16.6**	**1.5**	**2.6**	**0.4**
Sainsbury's, Bysing Wood Road			0.2		0.2	0.1	7.2	0.7	8.9	0.6	1.5	0.1
Morrisons, North Lane	0.2		0.1				2.2	0.0	7.5	1.0	1.1	0.2
Other Faversham							0.1		0.2		0.0	0.2
Iwade Local Centre				**0.1**								
Newington Local Centre			**0.2**	**0.5**								
Boughton-under-Blean Local Centre												**0.0**
Teynham Local Centre							**0.1**	**0.7**				
Other			1.3	1.2		0.7		0.0			0.1	
ISLE OF SHEPPEY												
Sheerness Town Centre	**54.9**	**6.0**	**2.2**	**0.1**	**2.2**				**0.2**			
Tesco, Bridge Road	36.3	1.6	2.2	0.1	2.2							
Aldi, Millenium Way	17.1	3.3							0.2			
Co-op, High Street		0.6										
Iceland, High Street	1.5	0.2										
Other		0.3										
Queenborough Local Centre		**0.2**										
Halfway Houses Local Centre		**1.3**										
Minster-on-Sea Local Centre		**0.1**										
Neats Court Retail Park, Queenborough	**16.7**	**3.0**	**0.5**		**0.4**							
Iceland, Neats Court Retail Park		0.2										
Morrisons, Neats Court Retail Park	16.7	2.9	0.5		0.4							
Other	**0.8**	**1.3**										
OUTSIDE BOROUGH	**1.0**	**0.1**	**7.4**	**0.6**	**1.7**	**0.2**	**0.8**	**0.2**	**3.9**	**0.2**	**4.1**	**0.5**
Canterbury	0.3		0.2		0.6	0.1	0.1	0.1	1.1	0.2	1.7	0.1
Gillingham	0.2		4.6	0.3	0.3						0.2	
Whitstable			0.5				0.3	0.1	2.8	0.1	1.6	0.3
Maidstone			1.1	0.1	0.6							
Rainham			0.9	0.1								
Ashford							0.1				0.6	0.1
Other Outside Borough	0.5	0.1	0.1	0.1	0.3	0.1	0.1	0.0				0.1
Total	**81.0**	**12.7**	**29.1**	**5.3**	**85.7**	**14.8**	**23.5**	**3.3**	**36.5**	**5.1**	**11.5**	**1.8**

Notes:
Total convenience goods expenditure per zone taken from Table 3
Split in Main/Top-up expenditure derived from Questions 3 and 6, NEMS Household Survey, September 2018
Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
Figures may not add due to rounding
2016 Prices

Table 3: Total Turnover of Convenience Facilities, 2019

	Zone												Total Survey Derived Turnover
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	(£m)
INSIDE BOROUGH	**99**	**92.5**	**77**	**26.3**	**98**	**98.5**	**96**	**25.8**	**90**	**37.4**	**66**	**8.7**	**289.3**
Sittingbourne Town Centre	**2**	**1.8**	**25**	**8.6**	**38**	**38.4**	**28**	**7.4**	**4**	**1.5**	**3**	**0.4**	**58.1**
Sainsbury's, Avenue of Remembrance	1	0.7	15	5.2	18	18.4	10	2.6	0	0.2	1	0.1	27.1
Aldi, East Street	1	1.1	7	2.5	14	14.3	16	4.4	3	1.2	3	0.4	23.7
Lidl, West Street			2	0.7	4	3.6	2	0.4	0	0.1			4.9
Iceland, High Street			0	0.1	1	1.1	0	0.1					1.3
Other			0	0.1	1	1.1							1.1
Sittingbourne Other	**7**	**6.2**	**33**	**11.4**	**56**	**55.8**	**14**	**3.8**	**1**	**0.2**	**3**	**0.3**	**77.8**
Asda, Trinity Trading Estate, Mill Way	4	3.6	16	5.5	24	23.9	3	0.8			2	0.3	34.2
Morrisons, Mill Way	2	2.1	15	5.1	23	23.1	10	2.7			0	0.1	33.0
M&S Foodhall, Sittingbourne Retail Park	1	0.5	1	0.4	1	1.2	1	0.2	1	0.2			2.5
Co-op, Church Road, Murston					1	1.2							1.2
Co-op, Grove Park, Gadby Road			0	0.2	2	1.9							2.1
Co-op, The Parade, Northwood Drive			1	0.2	0	0.3							0.5
Tesco Express, Canterbury Road					4	4.2	0	0.1					4.3
Faversham Town Centre			**0**	**0.0**	**1**	**0.7**	**13**	**3.4**	**42**	**17.4**	**37**	**4.9**	**26.4**
Tesco, Crescent Road					1	0.7	12	3.1	38	15.7	35	4.7	24.1
Co-op, Forbes Road							0	0.1	2	0.9	1	0.1	1.1
Iceland, East Street			0	0.0			0	0.1	1	0.5			0.6
Other							1	0.2	1	0.3	1	0.1	0.6
Faversham Other	**0**	**0.2**	**1**	**0.2**	**0**	**0.4**	**38**	**10.2**	**44**	**18.2**	**22**	**3.0**	**32.2**
Sainsbury's, Bysing Wood Road			0	0.2	0	0.4	30	7.9	23	9.4	11	1.5	19.4
Morrisons, North Lane	0	0.2	0	0.1			8	2.2	20	8.5	9	1.2	12.3
Other Faversham							0	0.1	1	0.2	2	0.2	0.5
Iwade Local Centre			**0**	**0.1**									**0.1**
Newington Local Centre			**2**	**0.7**									**0.7**
Boughton-under-Blean Local Centre											**0**	**0.0**	**0.0**
Teynham Local Centre							**3**	**0.9**					**0.9**
Other			7	2.5	1	0.7	0	0.0			0	0.1	3.3
ISLE OF SHEPPEY													
Sheerness Town Centre	**65**	**60.9**	**7**	**2.3**	**2**	**2.2**			**0**	**0.2**			**65.5**
Tesco, Bridge Road	40	37.9	7	2.3	2	2.2							42.3
Aldi, Millenium Way	22	20.4							0	0.2			20.5
Co-op, High Street	1	0.6											0.6
Iceland, High Street	2	1.8											1.8
Other	0	0.3											0.3
Queenborough Local Centre	**0**	**0.2**											**0.2**
Halfway Houses Local Centre	**1**	**1.3**											**1.3**
Minster-on-Sea Local Centre	**0**	**0.1**											**0.1**
Neats Court Retail Park, Queenborough	**21**	**19.8**	**2**	**0.5**	**0**	**0.4**							**20.7**
Iceland, Neats Court Retail Park	0	0.2											0.2
Morrisons, Neats Court Retail Park	21	19.6	2	0.5	0	0.4							20.6
Other	**2**	**2.1**											**2.1**
OUTSIDE BOROUGH	**1**	**1.2**	**23**	**8.0**	**2**	**2.0**	**4**	**1.0**	**10**	**4.2**	**34**	**4.5**	**20.8**
Canterbury	0	0.3	1	0.2	1	0.7	1	0.2	3	1.3	14	1.8	4.6
Gillingham	0	0.2	14	4.9	0	0.3					1	0.2	5.6
Whitstable			2	0.5			2	0.4	7	2.9	14	1.9	5.8
Maidstone			4	1.2	1	0.6							1.8
Rainham			3	1.0									1.0
Ashford							1	0.1			5	0.6	0.8
Other Outside Borough	1	0.6	0	0.2	0	0.4	1	0.2			0	0.1	1.4
Total	**100**	**93.7**	**100**	**34.3**	**100**	**100.5**	**100**	**26.8**	**100**	**41.6**	**100**	**13.2**	**310.1**

Notes:
Derived from Table 2
Figures may not add due to rounding.

2016 Prices

Table 4. Survey-derived performance of convenience floorspace compared to expected benchmark performance at 2019

	Gross Floorspace (sq.m)	Net Sales (sq.m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq.m)	Benchmark Convenience Goods Turnover (£m)	Survey Turnover (£m)	Estimated Turnover from Outside Survey Area (£m)	Estimated Total Turnover (£m)	Overtrading (£m)
Sittingbourne Town Centre									
Sainsbury's, Avenue of Remembrance	5,985	3,657	3,070	11,126	34.2	27.1	0.3	27.4	-6.8
Aldi, East Street	1,352	938	856	10,303	8.8	23.7	0.1	23.8	15.0
Lidl, West Street	1,475	1,045	934	9,614	9.0	4.9	0.0	4.9	-4.1
Iceland, High Street	806	377	376	6,527	2.5	1.3		1.3	-1.1
Other	-	-	-	-	1.1	1.1	0.0	1.1	
Sittingbourne Other									
Asda, Trinity Trading Estate, Mill Way	4,569	2,763	2,295	12,999	29.8	34.2	0.2	34.3	4.5
Morrisons, Mill Way	6,739	3,943	3,279	12,044	39.5	33.0	0.2	33.2	-6.3
M&S Foodhall, Sittingbourne Retail Park	1,365	819	663	9,969	6.6	2.5	0.0	2.6	-4.1
Co-op, Church Road, Murston	278	181	160	10,301	1.6	1.2		1.2	-0.5
Co-op, Grove Park, Gadby Road	148	97	85	10,301	0.9	2.1		2.1	1.2
Co-op, The Parade, Northwood Drive	308	162	143	10,301	1.5	0.5		0.5	-1.0
Tesco Express, Canterbury Road	328	214	199	12,362	2.5	4.3		4.3	1.8
Faversham Town Centre									
Tesco, Crescent Road	4,756	2,924	2,334	12,362	28.9	24.1	0.6	24.7	-4.1
Co-op, Forbes Road	241	159	140	10,301	1.4	1.1		1.1	-0.3
Iceland, East Street	402	183	182	6,527	1.2	0.6		0.6	-0.6
Other	-	-	-	-	0.6	0.6	0.1	0.7	0.1
Faversham Other									
Sainsbury's, Bysing Wood Road	4,549	2,779	2,255	11,126	25.1	19.4	0.2	19.6	-5.5
Morrisons, North Lane	2,528	1,479	1,357	12,044	16.3	12.3	0.1	12.4	-3.9
Other Faversham	-	-	-	-	0.5	0.5		0.5	
Iwade Local Centre	-	-	-	-	0.1	0.1		0.1	
Newington Local Centre	-	-	-	-	0.7	0.7		0.7	
Boughton-under-Blean Local Centre	-	-	-	-	0.0	0.0		0.0	
Teynham Local Centre	-	-	-	-	0.9	0.9		0.9	
Other	-	-	-	-	3.3	3.3		3.3	
Sheerness Town Centre									
Tesco, Bridge Road	7,004	4,305	3,437	12,362	42.5	42.3	1.3	43.6	1.1
Aldi, Millenium Way	1,409	978	892	10,303	9.2	20.5	0.2	20.7	11.6
Co-op, High Street	524	266	235	10,301	2.4	0.6		0.6	-1.8
Iceland, High Street	504	322	321	6,527	2.1	1.8		1.8	-0.3
Other	-	-	-	-	0.3	0.3	0.0	0.3	
Queenborough Local Centre	-	-	-	-	0.2	0.2		0.2	
Halfway Houses Local Centre	-	-	-	-	1.3	1.3		1.3	
Minster-on-Sea Local Centre	-	-	-	-	0.1	0.1	0.0	0.2	0.0
Neats Court Retail Park, Queenborough									
Iceland, Neats Court Retail Park	835	388	386	6,527	2.5	0.2	0.0	0.2	-2.4
Morrisons, Neats Court Retail Park	5,116	2,993	2,490	12,044	30.0	20.6	0.4	21.0	-9.0
Other	-	-	-	-	2.1	2.1		2.1	
Total					**309.5**	**289.3**	**3.8**	**293.0**	**-16.5**

Notes:
Gross floorspace derived from Retail Studies, Retail Impact Assessments, VOA website, Experian Goad or WYG assessment
Net convenience floorspace derived from above sources where available or based on WYG professional judgement having regard to Experian Goad Data/WYG visits
Sales densities derived from information provided by GlobalData.
It has been assumed that all unnamed convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that ientified by the survey)
Survey derived performance of stores calculated by addiing together 'main' and 'top up' turnover as set out in Table 3

2016 Prices

TABLE 5: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN SITTINGBOURNE

Table 5a: Estimated 'Capacity' for Convenience Goods Facilities in Sittingbourne

Year	Benchmark Turnover £m[1]	Turnover £m[2]	Estimated Inflow £m	Surplus Expenditure £m
2019	137.9	135.9	0.8	-1.3
2024	137.9	142.3	0.8	5.2
2029	138.6	148.6	0.9	10.9
2034	139.2	154.9	0.9	16.7
2038	139.9	159.8	0.9	20.8

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15
2. Assumes constant market share claimed by Sittingbourne facilities

2016 prices

Table 5b: Quantitative Need for Additional Convenience Goods Floorspace in Sittingbourne

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-1.3	-100
2024	5.2	500
2029	10.9	1,000
2034	16.7	1,500
2038	20.8	1,900

Notes:
Average sales density assumed to be £10,679 per sq.m (@2019) based on the average sales density of all grocery operators - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15
2016 prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

TABLE 6: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN SITTINGBOURNE

Table 6a: Estimated 'Capacity' for Convenience Goods Facilities in Faversham

Year	Benchmark Turnover £m[1]	Turnover £m[2]	Estimated Inflow £m	Surplus Expenditure £m
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

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15
2. Assumes constant market share claimed by Faversham facilities
2016 prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Faversham

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-14.5	-1,400
2024	-11.6	-1,100
2029	-9.2	-900
2034	-6.8	-600
2038	-5.0	-500

Notes:
Average sales density assumed to be £10,679 per sq.m (@2019) based on the average sales density of all grocery operators - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15
2016 prices

TABLE 7: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN SHEERNESS (including Queenborough)

Table 7a: Estimated 'Capacity' for Convenience Goods Facilities in Sheerness

Year	Benchmark Turnover £m[1]	Turnover £m[2]	Estimated Inflow £m	Surplus Expenditure £m
2019	89.0	86.2	1.9	-0.8
2024	89.0	90.3	2.0	3.4
2029	89.4	94.3	2.1	7.0
2034	89.8	98.3	2.2	10.8
2038	90.2	101.4	2.3	13.5

Notes:
1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15
2. Assumes constant market share claimed by Sheerness facilities

2016 prices

Table 7b: Quantitative Need for Additional Convenience Goods Floorspace in Sheerness

Year	Surplus £m	Floorspace Requirement (sq m net)
2019	-0.8	-100
2024	3.4	300
2029	7.0	700
2034	10.8	1,000
2038	13.5	1,200

Notes:
Average sales density assumed to be £10,679 per sq.m (@2019) based on the average sales density of all grocery operators - derived by GlobalData
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15

2016 prices

Appendix I

Statistical Retail Tables - Comparison Goods Capacity

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 1: Expenditure pattern of clothing and footwear goods, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**38%**	**14.1**	**30%**	**4.5**	**23%**	**10.1**	**25%**	**2.5**	**12%**	**2.1**	**20%**	**1.0**	**34.4**
Sittingbourne	**6%**	**2.1**	**22%**	**3.4**	**22%**	**9.7**	**12%**	**1.3**	**1%**	**0.3**			**16.7**
Sittingbourne Town Centre	3%	1.0	22%	3.4	20%	8.9	7%	0.7	1%	0.3			14.3
Sittingbourne Out-of-Centre	3%	1.1			2%	0.8	5%	0.5					2.4
Faversham							**12%**	**1.2**	**10%**	**1.9**	**20%**	**1.0**	**4.1**
Faversham Town Centre							11%	1.1	10%	1.9	12%	0.6	3.5
Faversham Out-of-Centre							1%	0.1			8%	0.4	0.6
Sheerness	**32%**	**11.7**	**7%**	**1.0**									**12.8**
Sheerness Town Centre	28%	10.3	1%	0.1									10.4
Neats Court Retail Park, Queenborough	4%	1.5	6%	0.9									2.4
Local Centres			1%	0.1									0.1
Other inside Borough	1%	0.3			1%	0.4							0.7
OUTSIDE BOROUGH	**62%**	**23.0**	**71%**	**10.8**	**77%**	**34.8**	**75%**	**7.6**	**88%**	**16.0**	**80%**	**4.0**	**96.2**
Canterbury	2%	0.8	7%	1.0	12%	5.5	44%	4.5	75%	13.6	63%	3.2	28.7
Ashford	6%	2.3	2%	0.4	7%	3.4	9%	0.9	3%	0.5	4%	0.2	7.5
Gillingham			11%	1.7	7%	3.3	4%	0.4					5.4
Chatham	2%	0.8	8%	1.2	4%	1.8							3.8
Maidstone	26%	9.5	5%	0.8	11%	4.7	1%	0.1			5%	0.2	15.3
Hempstead	10%	3.6	15%	2.2	7%	3.3	1%	0.1					9.3
Aylesford											1%	0.0	0.0
Bluewater Shopping Centre	8%	3.1	17%	2.5	27%	12.3	4%	0.4	1%	0.1	2%	0.1	18.6
Lakeside					1%	0.4					2%	0.1	0.4
Central London	4%	1.5											1.5
Other	4%	1.4	6%	0.9			12%	1.3	10%	1.8	4%	0.2	5.6
Total	**100%**	**37.1**	**100%**	**15.2**	**100%**	**44.9**	**100%**	**10.1**	**100%**	**18.1**	**100%**	**5.0**	**130.5**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 2: Expenditure pattern of books, CDs and DVDs, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**66%**	**4.6**	**62%**	**2.1**	**55%**	**4.4**	**39%**	**1.0**	**43%**	**1.5**	**32%**	**0.4**	**14.1**
Sittingbourne	**6%**	**0.4**	**52%**	**1.8**	**51%**	**4.1**	**17%**	**0.4**	**3%**	**0.1**			**6.8**
Sittingbourne Town Centre	6%	0.4	52%	1.8	47%	3.8	17%	0.4	3%	0.1			6.5
Sittingbourne Out-of-Centre					4%	0.3							0.3
Faversham					**4%**	**0.3**	**23%**	**0.6**	**40%**	**1.4**	**32%**	**0.4**	**2.7**
Faversham Town Centre							18%	0.5	40%	1.4	29%	0.4	2.2
Faversham Out-of-Centre					4%	0.3	4%	0.1			3%	0.0	0.4
Sheerness	**53%**	**3.7**	**7%**	**0.2**									**4.0**
Sheerness Town Centre	51%	3.6	7%	0.2									3.8
Neats Court Retail Park, Queenborough	2%	0.2											0.2
Local Centres	7%	0.5											0.5
Other inside Borough			3%	0.1									0.1
OUTSIDE BOROUGH	**34%**	**2.4**	**38%**	**1.3**	**45%**	**3.6**	**61%**	**1.5**	**57%**	**2.0**	**68%**	**0.9**	**11.8**
Canterbury	3%	0.2	7%	0.2	31%	2.4	49%	1.2	51%	1.8	55%	0.7	6.7
Ashford													
Gillingham			3%	0.1									0.1
Chatham													
Maidstone	12%	0.8	11%	0.4	7%	0.6					7%	0.1	1.9
Hempstead	5%	0.3	2%	0.1									0.4
Aylesford											4%	0.1	0.1
Bluewater Shopping Centre	8%	0.5	11%	0.4	7%	0.6	7%	0.2					1.7
Lakeside													
Central London	5%	0.3											0.3
Other	2%	0.2	4%	0.1			4%	0.1	6%	0.2	2%	0.0	0.7
Total	**100%**	**7.0**	**100%**	**3.4**	**100%**	**8.0**	**100%**	**2.6**	**100%**	**3.5**	**100%**	**1.4**	**25.8**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 3: Expenditure pattern of furnishings and household textile goods, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**82%**	**5.2**	**57%**	**1.8**	**62%**	**4.7**	**49%**	**1.1**	**27%**	**0.9**	**3%**	**0.0**	**13.7**
Sittingbourne	**55%**	**3.5**	**52%**	**1.6**	**59%**	**4.5**	**42%**	**1.0**	**15%**	**0.5**			**11.0**
Sittingbourne Town Centre	4%	0.3	30%	0.9	35%	2.6	27%	0.6	11%	0.3			4.8
Sittingbourne Out-of-Centre	51%	3.2	22%	0.7	25%	1.9	15%	0.3	4%	0.1			6.2
Faversham							**7%**	**0.2**	**13%**	**0.4**	**3%**	**0.0**	**0.6**
Faversham Town Centre							7%	0.2	13%	0.4	3%	0.0	0.6
Faversham Out-of-Centre													
Sheerness	**28%**	**1.7**	**4%**	**0.1**									**1.9**
Sheerness Town Centre	25%	1.6											1.6
Neats Court Retail Park, Queenborough	2%	0.1	4%	0.1									0.2
Local Centres			2%	0.1									0.1
Other inside Borough					3%	0.2							0.2
OUTSIDE BOROUGH	**18%**	**1.1**	**43%**	**1.3**	**38%**	**2.9**	**51%**	**1.2**	**73%**	**2.3**	**97%**	**1.1**	**9.8**
Canterbury	3%	0.2	2%	0.1	9%	0.7	32%	0.7	58%	1.8	84%	1.0	4.5
Ashford							1%	0.0	3%	0.1	3%	0.0	0.2
Gillingham	6%	0.4			3%	0.2							0.6
Chatham									2%	0.1			0.1
Maidstone	4%	0.3	20%	0.6	6%	0.4					4%	0.0	1.4
Hempstead	3%	0.2	8%	0.2									0.5
Aylesford			1%	0.0			2%	0.1	1%	0.0			0.1
Bluewater Shopping Centre			3%	0.1	17%	1.3	1%	0.0	1%	0.0	4%	0.0	1.5
Lakeside			5%	0.2	2%	0.2	13%	0.3	2%	0.1	2%	0.0	0.7
Central London													
Other	1%	0.1	4%	0.1			1%	0.0	5%	0.1			0.4
Total	**100%**	**6.3**	**100%**	**3.1**	**100%**	**7.5**	**100%**	**2.3**	**100%**	**3.1**	**100%**	**1.1**	**23.5**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 4: Expenditure pattern of small household goods such as glassware and utensils, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**79%**	**7.1**	**55%**	**2.4**	**67%**	**7.5**	**60%**	**1.8**	**30%**	**1.4**	**17%**	**0.3**	**20.6**
Sittingbourne	**39%**	**3.5**	**55%**	**2.4**	**65%**	**7.2**	**27%**	**0.8**	**7%**	**0.4**			**14.3**
Sittingbourne Town Centre	8%	0.7	31%	1.4	50%	5.6	21%	0.6	2%	0.1			8.3
Sittingbourne Out-of-Centre	31%	2.8	23%	1.0	15%	1.7	6%	0.2	6%	0.3			6.0
Faversham							**33%**	**1.0**	**22%**	**1.1**	**17%**	**0.3**	**2.4**
Faversham Town Centre							33%	1.0	22%	1.1	17%	0.3	2.4
Faversham Out-of-Centre													
Sheerness	**40%**	**3.6**											**3.6**
Sheerness Town Centre	36%	3.3											3.3
Neats Court Retail Park, Queenborough	4%	0.3											0.3
Local Centres													
Other inside Borough					3%	0.3							0.3
OUTSIDE BOROUGH	**21%**	**1.9**	**45%**	**2.0**	**33%**	**3.7**	**40%**	**1.2**	**70%**	**3.4**	**83%**	**1.3**	**13.5**
Canterbury	1%	0.1	1%	0.0	4%	0.5	19%	0.6	56%	2.7	52%	0.8	4.7
Ashford							2%	0.1	5%	0.3	9%	0.1	0.5
Gillingham	2%	0.1	5%	0.2									0.3
Chatham	2%	0.2	6%	0.3	1%	0.1							0.6
Maidstone	8%	0.7	6%	0.3	1%	0.1							1.1
Hempstead	2%	0.1	7%	0.3			4%	0.1			4%	0.1	0.6
Aylesford													
Bluewater Shopping Centre	4%	0.3	15%	0.7	16%	1.8	3%	0.1	3%	0.1	2%	0.0	3.0
Lakeside	2%	0.2	5%	0.2	5%	0.5	4%	0.1	4%	0.2	6%	0.1	1.3
Central London											2%	0.0	0.0
Other	1%	0.1			6%	0.6	8%	0.2	3%	0.2	8%	0.1	1.3
Total	**100%**	**9.1**	**100%**	**4.3**	**100%**	**11.2**	**100%**	**3.0**	**100%**	**4.9**	**100%**	**1.6**	**34.1**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 5: Expenditure pattern of clocks, jewellery and watches, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**45%**	**2.3**	**24%**	**0.7**	**33%**	**2.5**	**55%**	**1.1**	**33%**	**1.1**	**14%**	**0.1**	**7.7**
Sittingbourne	**7%**	**0.3**	**24%**	**0.7**	**32%**	**2.4**	**33%**	**0.6**	**12%**	**0.4**			**4.4**
Sittingbourne Town Centre	7%	0.3	20%	0.5	32%	2.4	22%	0.4	12%	0.4			4.1
Sittingbourne Out-of-Centre			4%	0.1			11%	0.2					0.3
Faversham							**21%**	**0.4**	**21%**	**0.7**	**14%**	**0.1**	**1.2**
Faversham Town Centre							21%	0.4	21%	0.7	14%	0.1	1.2
Faversham Out-of-Centre													
Sheerness	**39%**	**1.9**			**1%**	**0.1**							**2.0**
Sheerness Town Centre	39%	1.9			1%	0.1							2.0
Neats Court Retail Park, Queenborough													
Local Centres													
Other inside Borough													
OUTSIDE BOROUGH	**55%**	**2.7**	**76%**	**2.1**	**67%**	**5.0**	**45%**	**0.9**	**67%**	**2.1**	**86%**	**0.8**	**13.6**
Canterbury	2%	0.1			9%	0.6	30%	0.6	55%	1.8	45%	0.4	3.5
Ashford													
Gillingham	5%	0.2	3%	0.1	3%	0.2							0.5
Chatham			4%	0.1	3%	0.3							0.4
Maidstone	6%	0.3	10%	0.3	6%	0.5	2%	0.0			10%	0.1	1.2
Hempstead	6%	0.3	12%	0.3	8%	0.6	3%	0.1	3%	0.1			1.4
Aylesford													
Bluewater Shopping Centre	25%	1.2	31%	0.9	34%	2.5	10%	0.2	4%	0.1	14%	0.1	5.1
Lakeside													
Central London			1%	0.0	3%	0.3			3%	0.1	3%	0.0	0.4
Other	12%	0.6	13%	0.4					3%	0.1	14%	0.1	1.2
Total	**100%**	**5.0**	**100%**	**2.8**	**100%**	**7.5**	**100%**	**1.9**	**100%**	**3.2**	**100%**	**0.9**	**21.3**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 6: Expenditure pattern of toys, games, bicycles and other recreational / sports goods, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**58%**	**13.2**	**69%**	**6.9**	**67%**	**17.6**	**19%**	**1.4**	**27%**	**2.8**	**31%**	**1.2**	**43.1**
Sittingbourne	**19%**	**4.3**	**49%**	**4.9**	**67%**	**17.6**	**11%**	**0.8**	**13%**	**1.3**			**28.9**
Sittingbourne Town Centre	16%	3.6	16%	1.6	58%	15.2	11%	0.8	9%	0.9			22.2
Sittingbourne Out-of-Centre	3%	0.6	34%	3.4	9%	2.3			4%	0.4			6.7
Faversham							**8%**	**0.6**	**14%**	**1.5**	**31%**	**1.2**	**3.3**
Faversham Town Centre							8%	0.6	14%	1.5	31%	1.2	3.3
Faversham Out-of-Centre													
Sheerness	**39%**	**8.9**	**11%**	**1.1**									**10.0**
Sheerness Town Centre	22%	5.0	8%	0.8									5.8
Neats Court Retail Park, Queenborough	17%	3.9	4%	0.4									4.3
Local Centres													
Other inside Borough			9%	0.9									0.9
OUTSIDE BOROUGH	**42%**	**9.6**	**31%**	**3.1**	**33%**	**8.6**	**81%**	**6.1**	**73%**	**7.7**	**69%**	**2.6**	**37.7**
Canterbury	2%	0.5	5%	0.5	4%	1.0	53%	4.0	65%	6.8	55%	2.1	14.8
Ashford									5%	0.5	2%	0.1	0.6
Gillingham	3%	0.6	3%	0.3									0.9
Chatham	4%	0.9	8%	0.8	3%	0.9			2%	0.3			2.8
Maidstone	8%	1.8	1%	0.1	5%	1.2	8%	0.6			5%	0.2	4.0
Hempstead			4%	0.4	1%	0.4							0.8
Aylesford	17%	3.8	1%	0.1	1%	0.3	8%	0.6					4.9
Bluewater Shopping Centre	6%	1.5	8%	0.8	15%	3.8	4%	0.3					6.3
Lakeside									1%	0.1			0.1
Central London													
Other	2%	0.5	1%	0.1	4%	1.0	8%	0.6			7%	0.3	2.5
Total	**100%**	**22.8**	**100%**	**10.0**	**100%**	**26.1**	**100%**	**7.6**	**100%**	**10.5**	**100%**	**3.8**	**80.7**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
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Table 7: Expenditure pattern of chemist goods (including health and beauty products), by Zone, 2018

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**92%**	**15.1**	**63%**	**4.4**	**91%**	**18.0**	**89%**	**4.2**	**97%**	**8.0**	**62%**	**1.5**	**51.2**
Sittingbourne	**10%**	**1.6**	**45%**	**3.2**	**91%**	**17.9**	**18%**	**0.8**	**5%**	**0.4**			**23.9**
Sittingbourne Town Centre	9%	1.4	41%	2.9	89%	17.5	18%	0.8	5%	0.4			23.1
Sittingbourne Out-of-Centre	1%	0.1	4%	0.3	2%	0.4							0.8
Faversham	**1%**	**0.1**	**1%**	**0.0**			**52%**	**2.4**	**92%**	**7.6**	**62%**	**1.5**	**11.7**
Faversham Town Centre	1%	0.1	1%	0.0			51%	2.4	91%	7.6	60%	1.4	11.6
Faversham Out-of-Centre							1%	0.0	1%	0.1	2%	0.0	0.1
Sheerness	**67%**	**11.1**	**2%**	**0.1**									**11.2**
Sheerness Town Centre	63%	10.3	2%	0.1									10.5
Neats Court Retail Park, Queenborough	5%	0.8											0.8
Local Centres	13%	2.1	14%	1.0			20%	0.9					4.0
Other inside Borough	1%	0.1	1%	0.0	1%	0.1							0.3
OUTSIDE BOROUGH	**8%**	**1.4**	**37%**	**2.6**	**9%**	**1.8**	**11%**	**0.5**	**3%**	**0.3**	**38%**	**0.9**	**7.5**
Canterbury			2%	0.2	5%	1.0	6%	0.3	2%	0.2	24%	0.6	2.2
Ashford													
Gillingham			3%	0.2	1%	0.1	1%	0.1					0.4
Chatham													
Maidstone	4%	0.6	4%	0.3							2%	0.1	1.0
Hempstead	2%	0.3	9%	0.6	1%	0.2							1.0
Aylesford													
Bluewater Shopping Centre	2%	0.4	3%	0.2	1%	0.2	2%	0.1					0.8
Lakeside													
Central London													
Other	1%	0.1	16%	1.1	2%	0.4	2%	0.1	1%	0.1	12%	0.3	2.1
Total	**100%**	**16.5**	**100%**	**7.1**	**100%**	**19.8**	**100%**	**4.7**	**100%**	**8.3**	**100%**	**2.4**	**58.7**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
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Table 8: Expenditure pattern of large household electrical items (white goods), by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**98%**	**3.4**	**75%**	**1.0**	**87%**	**3.5**	**69%**	**0.7**	**28%**	**0.5**	**12%**	**0.1**	**9**
Sittingbourne	**82%**	**2.9**	**73%**	**0.9**	**86%**	**3.4**	**64%**	**0.7**	**8%**	**0.1**	**5%**	**0.0**	**8**
Sittingbourne Town Centre	33%	1.1	24%	0.3	30%	1.2	27%	0.3	4%	0.1	5%	0.0	3.0
Sittingbourne Out-of-Centre	49%	1.7	49%	0.6	56%	2.2	37%	0.4	4%	0.1			5
Faversham							**6%**	**0.1**	**20%**	**0.3**	**8%**	**0.0**	**0**
Faversham Town Centre							6%	0.1	20%	0.3	8%	0.0	0
Faversham Out-of-Centre													
Sheerness	**16%**	**0.5**	**2%**	**0.0**									**1**
Sheerness Town Centre	16%	0.5	2%	0.0									1
Neats Court Retail Park, Queenborough													
Local Centres					1%	0.0							0
Other inside Borough													
OUTSIDE BOROUGH	**2%**	**0.1**	**25%**	**0.3**	**13%**	**0.5**	**31%**	**0.3**	**72%**	**1.2**	**88%**	**0.4**	**3**
Canterbury			1%	0.0	2%	0.1	19%	0.2	65%	1.1	70%	0.3	2
Ashford							9%	0.1	3%	0.0	3%	0.0	0
Gillingham			2%	0.0									0
Chatham	1%	0.0	4%	0.0	5%	0.2	1%	0.0	1%	0.0			0
Maidstone			2%	0.0	3%	0.1			1%	0.0	2%	0.0	0
Hempstead			4%	0.0									0
Aylesford					1%	0.1					3%	0.0	0
Bluewater Shopping Centre	1%	0.0	7%	0.1	1%	0.0	2%	0.0			10%	0.0	0.2
Lakeside													
Central London													
Other			4%	0.1					1%	0.0			0
Total	**100%**	**3.5**	**100%**	**1.3**	**100%**	**4.0**	**100%**	**1.0**	**100%**	**1.7**	**100%**	**0.5**	**11.9**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 9: Expenditure pattern of small electrical goods (cameras, tablets, hairdryers, blenders), by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**95%**	**11.4**	**62%**	**3.7**	**87%**	**12.4**	**77%**	**3.4**	**38%**	**2.3**	**15%**	**0.3**	**33.5**
Sittingbourne	**51%**	**6.1**	**60%**	**3.5**	**85%**	**12.1**	**55%**	**2.4**	**5%**	**0.3**	**4%**	**0.1**	**24.5**
Sittingbourne Town Centre	27%	3.3	35%	2.1	51%	7.3	24%	1.0	5%	0.3	4%	0.1	14.0
Sittingbourne Out-of-Centre	23%	2.8	25%	1.5	34%	4.9	31%	1.3					10.5
Faversham							**22%**	**1.0**	**33%**	**2.0**	**11%**	**0.2**	**3.2**
Faversham Town Centre							17%	0.7	29%	1.8	11%	0.2	2.8
Faversham Out-of-Centre							5%	0.2	3%	0.2			0.4
Sheerness	**45%**	**5.3**	**2%**	**0.1**	**1%**	**0.2**							**5.6**
Sheerness Town Centre	44%	5.2	2%	0.1									5.3
Neats Court Retail Park, Queenborough	1%	0.1			1%	0.2							0.3
Local Centres													
Other inside Borough					1%	0.1							0.1
OUTSIDE BOROUGH	**5%**	**0.6**	**38%**	**2.2**	**13%**	**1.9**	**23%**	**1.0**	**62%**	**3.8**	**85%**	**1.8**	**11.2**
Canterbury	2%	0.3	1%	0.1	2%	0.3	18%	0.8	55%	3.3	65%	1.4	6.2
Ashford							3%	0.1	3%	0.2	3%	0.1	0.4
Gillingham			1%	0.1									0.1
Chatham			2%	0.1			2%	0.1	1%	0.1			0.3
Maidstone					3%	0.4					9%	0.2	0.6
Hempstead			11%	0.7	3%	0.4							1.1
Aylesford											3%	0.1	0.1
Bluewater Shopping Centre	1%	0.1	19%	1.1	5%	0.7					1%	0.0	2.0
Lakeside													
Central London											2%	0.0	0.0
Other	1%	0.2	3%	0.2					3%	0.2	2%	0.0	0.6
Total	**100%**	**12.0**	**100%**	**5.9**	**100%**	**14.3**	**100%**	**4.3**	**100%**	**6.1**	**100%**	**2.2**	**44.7**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 10: Expenditure pattern of furniture, carpets and floor coverings, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**53%**	**4.5**	**53%**	**2.0**	**68%**	**7.1**	**43%**	**1.2**	**47%**	**2.1**	**13%**	**0.2**	**17.1**
Sittingbourne	**15%**	**1.3**	**53%**	**2.0**	**67%**	**7.0**	**30%**	**0.8**	**8%**	**0.3**	**5%**	**0.1**	**11.5**
Sittingbourne Town Centre	10%	0.9	27%	1.0	40%	4.2	13%	0.4	6%	0.3	5%	0.1	6.7
Sittingbourne Out-of-Centre	5%	0.4	26%	1.0	27%	2.8	17%	0.5	2%	0.1			4.8
Faversham							**9%**	**0.2**	**39%**	**1.7**	**9%**	**0.1**	**2.1**
Faversham Town Centre							9%	0.2	39%	1.7	9%	0.1	2.1
Faversham Out-of-Centre													
Sheerness	**35%**	**3.0**											**3.0**
Sheerness Town Centre	35%	3.0											3.0
Neats Court Retail Park, Queenborough													
Local Centres	2%	0.2			1%	0.1	5%	0.1					0.4
Other inside Borough													
OUTSIDE BOROUGH	**47%**	**4.0**	**47%**	**1.8**	**32%**	**3.3**	**57%**	**1.5**	**53%**	**2.3**	**87%**	**1.2**	**14.2**
Canterbury	2%	0.2	4%	0.2	3%	0.3	28%	0.8	43%	1.9	56%	0.8	4.1
Ashford			4%	0.2			3%	0.1			3%	0.0	0.3
Gillingham	16%	1.3	7%	0.3	14%	1.4	10%	0.3					3.3
Chatham			1%	0.0					2%	0.1			0.1
Maidstone	16%	1.3	21%	0.8	7%	0.7	8%	0.2	1%	0.1			3.1
Hempstead			1%	0.0									0.0
Aylesford	9%	0.8											0.8
Bluewater Shopping Centre	1%	0.1			1%	0.1	2%	0.1			1%	0.0	0.3
Lakeside			1%	0.0	3%	0.3			2%	0.1			0.4
Central London													
Other	3%	0.3	8%	0.3	4%	0.4	6%	0.1	5%	0.2	27%	0.4	1.7
Total	**100%**	**8.5**	**100%**	**3.8**	**100%**	**10.4**	**100%**	**2.7**	**100%**	**4.4**	**100%**	**1.4**	**31.3**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 11: Expenditure pattern of DIY (including gardening) goods, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**86%**	**5.7**	**73%**	**2.4**	**95%**	**7.3**	**77%**	**2.0**	**41%**	**1.3**	**18%**	**0.2**	**19.0**
Sittingbourne	**70%**	**4.7**	**72%**	**2.3**	**90%**	**6.9**	**65%**	**1.7**	**18%**	**0.6**	**5%**	**0.1**	**16.3**
Sittingbourne Town Centre	18%	1.2	23%	0.8	40%	3.1	34%	0.9	3%	0.1	5%	0.1	6.0
Sittingbourne Out-of-Centre	53%	3.5	49%	1.6	50%	3.8	31%	0.8	15%	0.5			10.2
Faversham					**1%**	**0.0**	**10%**	**0.3**	**21%**	**0.7**	**9%**	**0.1**	**1.1**
Faversham Town Centre					1%	0.0	10%	0.3	21%	0.7	9%	0.1	1.1
Faversham Out-of-Centre													
Sheerness	**14%**	**0.9**											**0.9**
Sheerness Town Centre	13%	0.8											0.8
Neats Court Retail Park, Queenborough	1%	0.1											0.1
Local Centres	1%	0.1			4%	0.3	1%	0.0			2%	0.0	0.4
Other inside Borough			1%	0.0			1%	0.0	2%	0.1	2%	0.0	0.2
OUTSIDE BOROUGH	**14%**	**1.0**	**27%**	**0.9**	**5%**	**0.4**	**23%**	**0.6**	**59%**	**1.9**	**82%**	**1.1**	**5.8**
Canterbury	1%	0.1	1%	0.0			8%	0.2	40%	1.3	59%	0.8	2.3
Ashford					1%	0.1	6%	0.2			6%	0.1	0.3
Gillingham	10%	0.7	21%	0.7	3%	0.3	4%	0.1	1%	0.0			1.8
Chatham			3%	0.1					1%	0.0			0.1
Maidstone			2%	0.1			1%	0.0			2%	0.0	0.1
Hempstead									2%	0.0			0.0
Aylesford											2%	0.0	0.0
Bluewater Shopping Centre													
Lakeside													
Central London													
Other	3%	0.2	1%	0.0	1%	0.0	4%	0.1	16%	0.5	14%	0.2	1.1
Total	**100%**	**6.7**	**100%**	**3.3**	**100%**	**7.7**	**100%**	**2.6**	**100%**	**3.2**	**100%**	**1.3**	**24.7**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 12: Comparison Goods Expenditure Pattern - Bulky Goods, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**73**	**13.6**	**64**	**5.4**	**81**	**17.9**	**61**	**3.9**	**42**	**3.9**	**15**	**0.5**	**45.1**
Sittingbourne	**47**	**8.9**	**63**	**5.3**	**79**	**17.3**	**50**	**3.2**	**11**	**1.1**	**5**	**0.1**	**35.9**
Sittingbourne Town Centre	17	3.2	25	2.1	38	8.5	24	1.5	4	0.4	5	0.1	15.8
Sittingbourne Out-of-Centre	30	5.7	39	3.2	40	8.9	26	1.6	7	0.7			20.1
Faversham					**0**	**0.0**	**9**	**0.5**	**30**	**2.8**	**9**	**0.3**	**3.6**
Faversham Town Centre					0	0.0	9	0.5	30	2.8	9	0.3	3.6
Faversham Out-of-Centre													
Sheerness	**24**	**4.5**	**0**	**0.0**									**4.5**
Sheerness Town Centre	24	4.4	0	0.0									4.4
Neats Court Retail Park, Queenborough	1	0.1											0.1
Local Centres	1	0.2			2	0.5	2	0.1			1	0.0	0.9
Other inside Borough			1	0.0			0	0.0	1	0.1	1	0.0	0.2
OUTSIDE BOROUGH	**27**	**5.1**	**36**	**3.0**	**19**	**4.2**	**39**	**2.5**	**58**	**5.4**	**85**	**2.7**	**22.8**
Canterbury	1	0.2	3	0.2	2	0.4	18	1.2	46	4.3	59	1.9	8.1
Ashford			2	0.2	0	0.1	5	0.3	1	0.0	4	0.1	0.7
Gillingham	11	2.0	12	1.0	8	1.7	6	0.4	0	0.0			5.1
Chatham	0	0.0	2	0.2	1	0.2	0	0.0	1	0.1			0.6
Maidstone	7	1.3	11	0.9	4	0.8	4	0.3	1	0.1	1	0.0	3.5
Hempstead			1	0.1					1	0.0			0.1
Aylesford	4	0.8			0	0.1					1	0.0	0.9
Bluewater Shopping Centre	1	0.1	1	0.1	1	0.2	1	0.1			2	0.1	0.5
Lakeside			1	0.0	1	0.3			1	0.1			0.4
Central London													
Other	3	0.5	4	0.4	2	0.4	4	0.2	8	0.7	17	0.5	2.8
Total	**100**	**18.7**	**100**	**8.4**	**100**	**22.1**	**100**	**6.3**	**100**	**9.3**	**100**	**3.1**	**68.0**

Notes:
Market share figures derived from NEMS Household Survey, September 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 13: Comparison Goods Expenditure Pattern - Non-Bulky Goods (excluding Clothing & Footwear), by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
INSIDE BOROUGH	**75**	**58.9**	**60**	**21.9**	**71**	**67.1**	**53**	**13.9**	**45**	**18.0**	**29**	**3.9**	**183.7**
Sittingbourne	**25**	**19.6**	**49**	**18.1**	**70**	**65.8**	**26**	**6.9**	**8**	**3.3**	**1**	**0.1**	**113.8**
Sittingbourne Town Centre	13	10.0	30	11.1	58	54.4	18	4.8	6	2.5	1	0.1	82.9
Sittingbourne Out-of-Centre	12	9.6	19	6.9	12	11.4	8	2.1	2	0.8			30.8
Faversham	**0**	**0.1**	**0**	**0.0**	**0**	**0.3**	**23**	**6.2**	**37**	**14.6**	**28**	**3.8**	**25.0**
Faversham Town Centre	0	0.1	0	0.0			22	5.8	36	14.3	28	3.7	24.0
Faversham Out-of-Centre					0	0.3	1	0.4	1	0.3	1	0.1	1.0
Sheerness	**46**	**36.4**	**5**	**1.8**	**0**	**0.3**							**38.4**
Sheerness Town Centre	39	30.9	4	1.3	0	0.1							32.3
Neats Court Retail Park, Queenborough	7	5.4	1	0.5	0	0.2							6.1
Local Centres	3	2.6	3	1.1			4	0.9					4.6
Other inside Borough	0	0.1	3	1.0	1	0.7							1.9
OUTSIDE BOROUGH	**25**	**19.7**	**40**	**14.6**	**29**	**27.4**	**47**	**12.4**	**55**	**21.6**	**71**	**9.4**	**105.1**
Canterbury	2	1.3	3	1.1	7	6.6	31	8.2	47	18.4	53	7.0	42.5
Ashford							1	0.2	3	1.0	2	0.3	1.6
Gillingham	2	1.4	2	0.9	1	0.5	0	0.1					2.9
Chatham	1	1.1	4	1.3	1	1.2	0	0.1	1	0.4			4.1
Maidstone	6	4.6	5	2.0	3	3.3	2	0.6			5	0.7	11.1
Hempstead	2	1.3	7	2.6	2	1.6	1	0.2	0	0.1	0	0.1	5.8
Aylesford	5	3.8	0	0.2	0	0.3	3	0.7	0	0.0	1	0.1	5.1
Bluewater Shopping Centre	5	4.0	11	4.1	12	10.9	3	0.9	1	0.3	2	0.2	20.4
Lakeside	0	0.2	1	0.4	1	0.7	2	0.4	1	0.4	1	0.1	2.2
Central London	0	0.3	0	0.0	0	0.3			0	0.1	1	0.1	0.8
Other	2	1.7	6	2.1	2	2.0	4	1.1	2	0.9	6	0.9	8.6
Total	**100**	**78.6**	**100**	**36.6**	**100**	**94.4**	**100**	**26.4**	**100**	**39.5**	**100**	**13.3**	**288.8**

Notes:
Derived from Tables 8, 10, 11, 12
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

SWALE BOROUGH COUNCIL
RETAIL AND LEISURE NEEDS ASSESSMENT

Table 14: Comparison Goods Expenditure Pattern - Combined, by Zone, 2019

	Zone												Total Survey Derived Turnover (£m)		Inflow	
	1 Isle of Sheppey		2 Borough West		3 Sittingbourne		4 Central Borough		5 Faversham		6 Borough East					
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	(%)	(£m)
INSIDE BOROUGH	**64**	**86.7**	**53**	**31.8**	**59**	**95.1**	**47**	**20.3**	**36**	**24.0**	**25**	**5.3**	**54**	**263.2**		
Sittingbourne	**23**	**30.5**	**44**	**26.7**	**58**	**92.9**	**26**	**11.3**	**7**	**4.7**	**1**	**0.2**	**34**	**166.3**		
Sittingbourne Town Centre	11	14.2	28	16.6	44	71.8	16	7.0	5	3.2	1	0.2	23	113.0	2	2.3
Sittingbourne Out-of-Centre	12	16.3	17	10.2	13	21.1	10	4.3	2	1.5			11	53.3	1	0.3
Faversham	**0**	**0.1**	**0**	**0.0**	**0**	**0.3**	**19**	**7.9**	**29**	**19.2**	**24**	**5.1**	**7**	**32.8**		
Faversham Town Centre	0	0.1	0	0.0	0	0.0	17	7.4	28	19.0	21	4.6	6	31.2	8	2.5
Faversham Out-of-Centre					0	0.3	1	0.5	0	0.3	2	0.5	0	1.6	1	0.0
Sheerness	**39**	**52.6**	**5**	**2.8**	**0**	**0.3**							**11**	**55.7**		
Sheerness Town Centre	34	45.6	2	1.4	0	0.1							10	47.1	3	1.2
Neats Court Retail Park, Queenborough	5	7.0	2	1.4	0	0.2							2	8.6	1	0.1
Local Centres	2	2.9	2	1.2	0	0.5	3	1.1			0	0.0	1	5.6		
Other inside Borough	0	0.5	2	1.1	1	1.1	0	0.0	0	0.1	0	0.0	1	2.8		
OUTSIDE BOROUGH	**36**	**47.8**	**47**	**28.4**	**41**	**66.3**	**53**	**22.5**	**64**	**43.0**	**75**	**16.1**	**46**	**224.1**		
Canterbury	2	2.3	4	2.3	8	12.5	32	13.8	54	36.3	56	12.0	16	79.3		
Ashford	2	2.3	1	0.5	2	3.4	3	1.4	2	1.6	3	0.6	2	9.8		
Gillingham	3	3.4	6	3.6	3	5.6	2	0.8	0	0.0			3	13.4		
Chatham	1	1.9	4	2.6	2	3.3	0	0.1	1	0.5			2	8.4		
Maidstone	11	15.4	6	3.7	5	8.9	2	1.0	0	0.1	4	0.9	6	29.9		
Hempstead	4	4.9	8	4.9	3	4.9	1	0.3	0	0.1	0	0.1	3	15.2		
Aylesford	3	4.6	0	0.2	0	0.3	2	0.7	0	0.0	1	0.2	1	6.1		
Bluewater Shopping Centre	5	7.3	11	6.8	14	23.4	3	1.4	1	0.4	2	0.4	8	39.6		
Lakeside	0	0.2	1	0.4	1	1.4	1	0.4	1	0.5	1	0.2	1	3.1		
Central London	1	1.8	0	0.0	0	0.3			0	0.1	0	0.1	0	2.3		
Other	3	3.6	6	3.4	2	2.4	6	2.6	5	3.4	7	1.6	3	17.0		
Total	**100**	**134.4**	**100**	**60.2**	**100**	**161.4**	**100**	**42.8**	**100**	**67.0**	**100**	**21.5**	**100**	**487.3**		

Notes:
Derived from Tables 2, 3, 4, 5, 6, 7, 9
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2016 Prices

TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN SITTINGBOURNE

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities in Sittingbourne

Year	Benchmark Turnover £m[1]	Turnover - £m[2]	Estimated Inflow - £m	Surplus Expenditure - £m
2019	168.8	166.3	2.5	0.0
2024	184.9	199.4	3.0	17.5
2029	206.2	243.1	3.7	40.6
2034	229.9	296.2	4.5	70.9
2038	250.8	346.1	5.3	100.6

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15
2. Assumes constant market share claimed by Sittingbourne facilities from Study Area

2016 prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace in Sittingbourne

Year	Surplus £m	Floorspace Requirement	
		Min[1]	Max[2]
2019	0.0	0	0
2024	17.5	2,900	5,300
2029	40.6	6,000	11,100
2034	70.9	9,500	17,300
2038	100.6	12,300	22,600

Notes:

1. Average sales density assumed to be £5,500 per sq.m which WYG considers to be towards the higher end of what could be achieved in Sittingbourne
2. Average sales density assumed to be £3,000 per sq.m which WYG considers to be towards the lower end of what could be achieved in Sittingbourne

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15

2016 prices

TABLE 16: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN FAVERSHAM

Table 16a: Estimated 'Capacity' for Comparison Goods Facilities in Faversham

Year	Benchmark Turnover £m[1]	Turnover - £m[2]	Estimated Inflow - £m	Surplus Expenditure - £m
2019	35.3	32.8	2.5	0.0
2024	38.6	39.3	3.0	3.7
2029	43.1	47.9	3.7	8.5
2034	48.0	58.3	4.5	14.8
2038	52.4	68.2	5.2	21.0

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15
2. Assumes constant market share claimed by Faversham facilities from Study Area

2016 prices

Table 16b: Quantitative Need for Additional Comparison Goods Floorspace in Faversham

Year	Surplus £m	Floorspace Requirement	
		Min[1]	Max[2]
2019	0.0	0	0
2024	3.7	600	1,100
2029	8.5	1,300	2,300
2034	14.8	2,100	3,600
2038	21.0	2,700	4,700

Notes:

1. Average sales density assumed to be £5,250 per sq.m which WYG considers to be towards the higher end of what could be achieved in Faversham
2. Average sales density assumed to be £3,000 per sq.m which WYG considers to be towards the lower end of what could be achieved in Faversham

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15

2016 prices

TABLE 17: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN SHEERNESS

Table 17a: Estimated 'Capacity' for Comparison Goods Facilities in Sheerness

Year	Benchmark Turnover £m[1]	Turnover - £m[2]	Estimated Inflow - £m	Surplus Expenditure - £m
2019	59.2	55.7	3.5	0.0
2024	64.8	66.8	4.2	6.1
2029	72.3	81.4	5.1	14.2
2034	80.6	99.2	6.2	24.8
2038	87.9	115.9	7.3	35.3

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15
2. Assumes constant market share claimed by Faversham facilities from Study Area

2016 prices

Table 17b: Quantitative Need for Additional Comparison Goods Floorspace in Sheerness

Year	Surplus £m	Floorspace Requirement	
		Min[1]	Max[2]
2019	0.0	0	0
2024	6.1	1,100	1,900
2029	14.2	2,200	3,900
2034	24.8	3,500	6,100
2038	35.3	4,500	7,900

Notes:

1. Average sales density assumed to be £5,250 per sq.m which WYG considers to be towards the higher end of what could be achieved in Sheerness
2. Average sales density assumed to be £3,000 per sq.m which WYG considers to be towards the lower end of what could be achieved in Sheerness

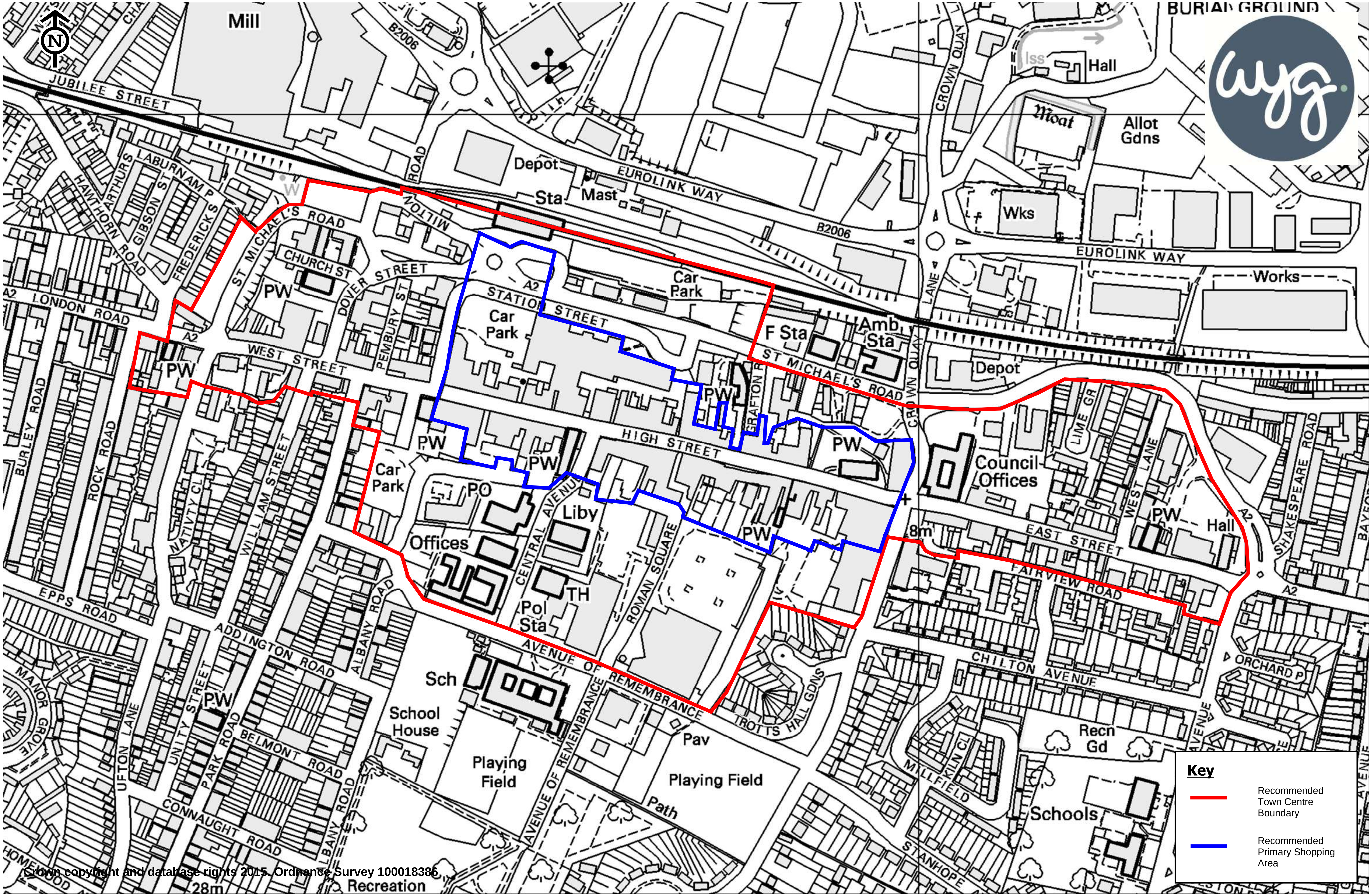
Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15

2016 prices

Appendix J
Recommended Town Centre Boundaries and Primary Shopping Area

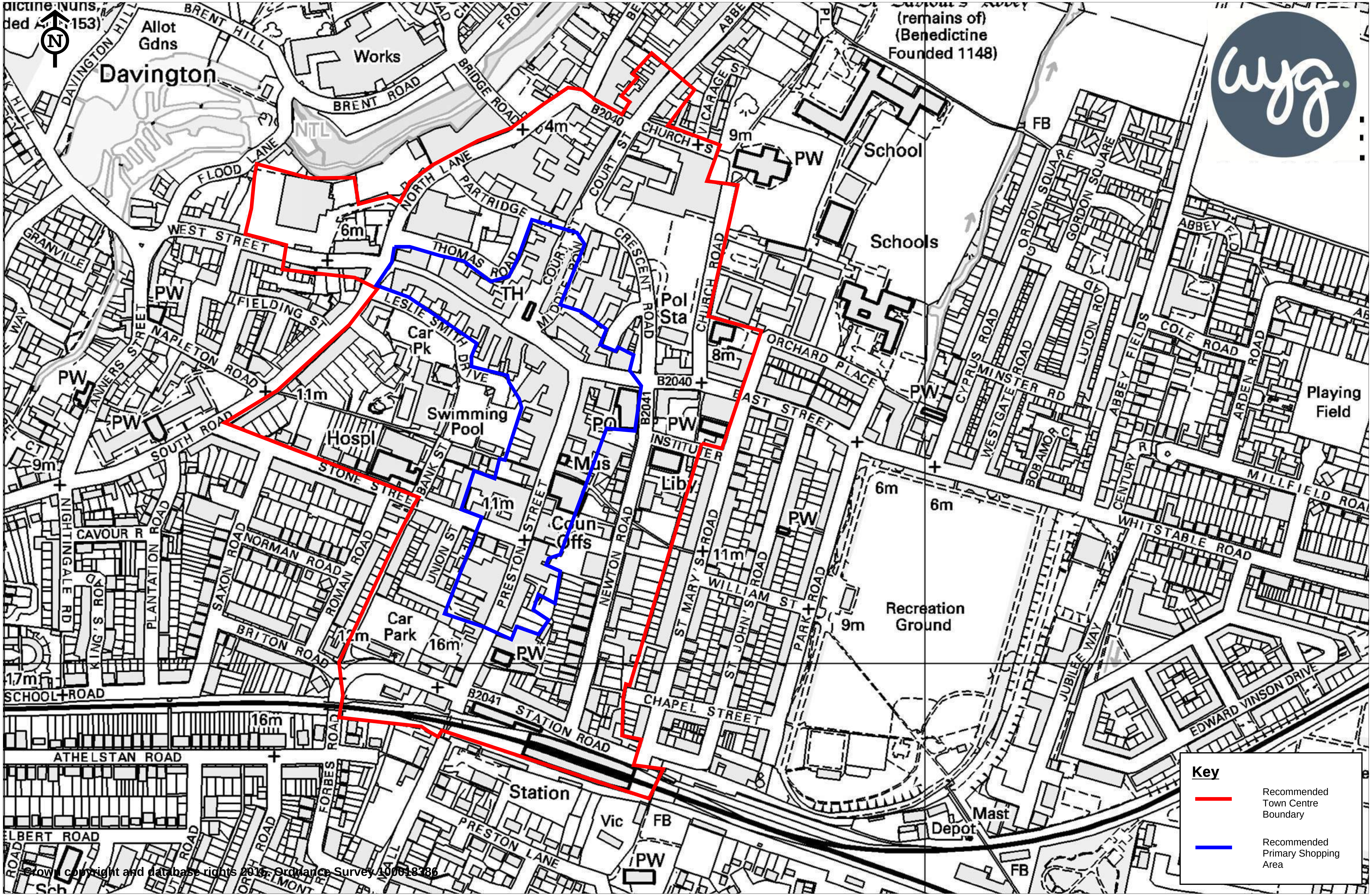
Sittingbourne Town Centre

Scale: NTS



Faversham Town Centre

Scale: NTS



Sheerness Town Centre | Scale: NTS